PeopleSoft Financials and Supply Chain Management 9.2

PeopleSoft Project Costing

G47351-01
March 2026

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G47351-01

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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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see Understanding Locally Installed PeopleSoft Online Help.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. 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 three main types of common help are:

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- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

Most product families 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 family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, 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: 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.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

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.

Typographical Convention	Description
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.

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Typographical Convention	Description
⇒	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, Country, 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.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

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Industry Identifiers

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

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft FSCM Related Links

Oracle Help Center

Hosted Online Help

PeopleSoft Information Portal

My Oracle Support

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the Application Fundamentals: Understanding Keyword Search within Components topic.

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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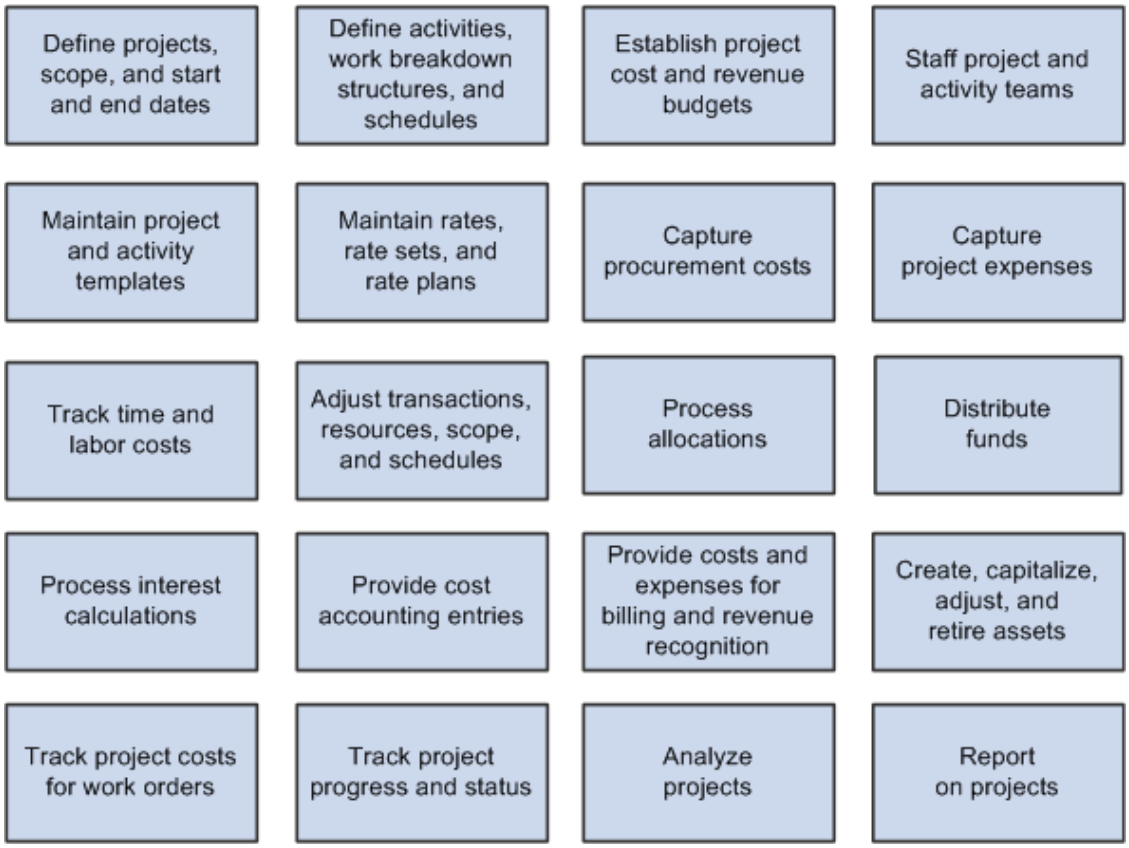
1

Getting Started with PeopleSoft Project Costing

PeopleSoft Project Costing Business Processes

The PeopleSoft Project Costing business processes are shown in this diagram:

This diagram illustrates the PeopleSoft Project Costing business processes. These business processes include defining setup data, maintaining setup data, creating transactions, and analyzing transaction data.



These business processes are discusses in the business process topics for PeopleSoft Project Costing.

PeopleSoft Project Costing Integration Touchpoints

To use PeopleSoft Project Costing to full advantage, it is important to understand the integration points between Project Costing and the other PeopleSoft applications that you have purchased, such as the ones that are shown in this diagram:

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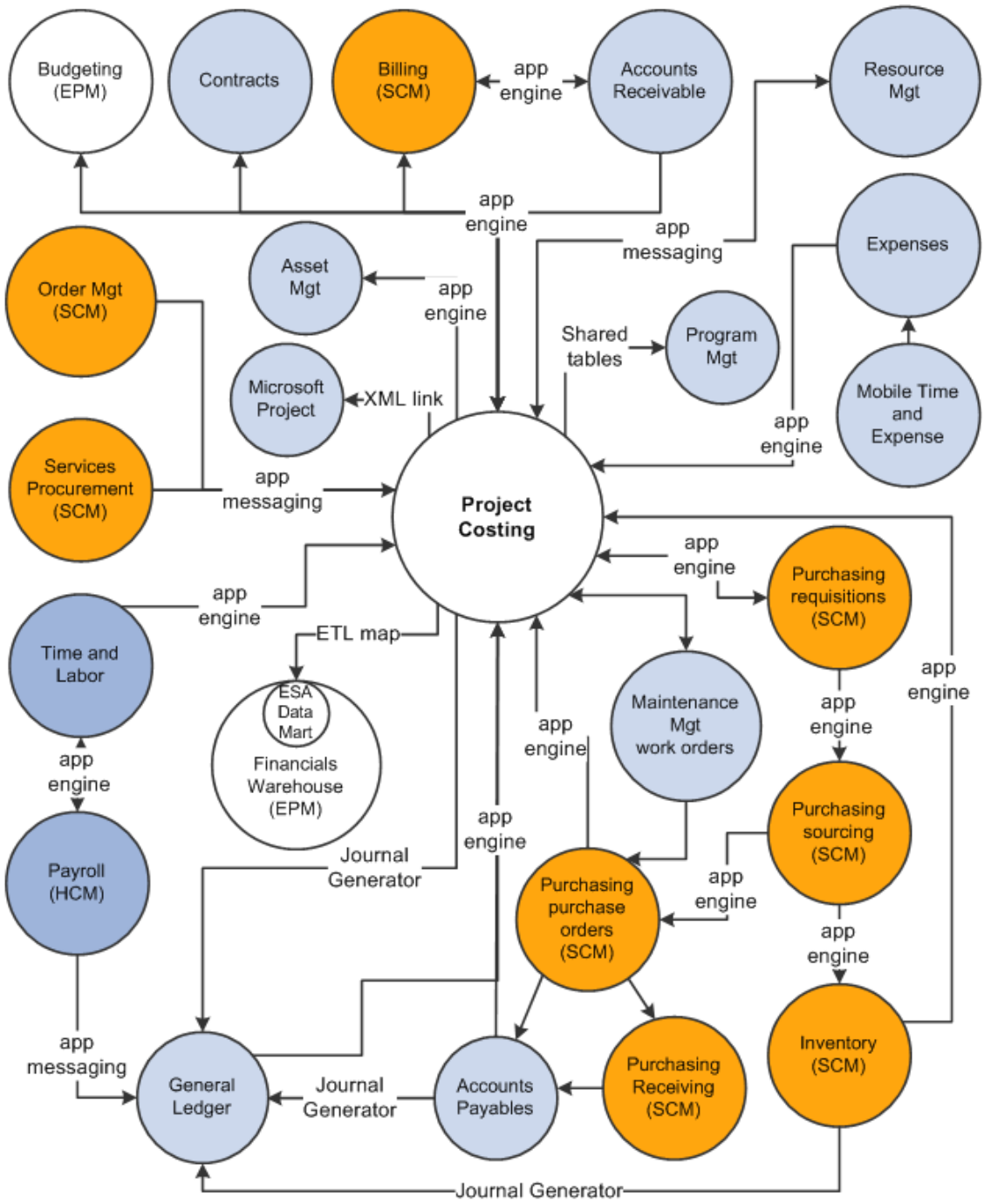
Applications that integrate with PeopleSoft Project Costing



Integration considerations are discussed in the implementation topics of the Project Costing subject.

Supplemental information about third-party application integration is located on Oracle's My Oracle Support website.

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PeopleSoft Project Costing Implementation

Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Project Costing also provides component interfaces to help you load data from the existing system into Project Costing tables. You can use the Excel to Component Interface utility with these component interfaces to populate Project Costing tables:

Component	Component Interface	Reference
Define Standard Activities (FS_ACTIVITY_TBL)	PC_STD_ACT_INTFC	See Setting Up Activity-Related Information.
Project Costing Options (PC_BUS_UNIT_OPT)	PROJECT_BU_OPTIONS	See Defining Project Options.
Rate Sets (PC_RATE)	PC_RATE_INTFC	See Defining Rate Set Categories, Rate Sets, and Rate Plans.
Rates by Employee (PC_RATE_EMPL)	PC_RATE_EMPL_INTFC	See Defining Rates for Employees, Job Codes, and Project Roles.
Rates by Job Code (PC_RATE_JOBC)	PC_RATE_JOBC_INTFC	See Defining Rates for Employees, Job Codes, and Project Roles.
Categories (PROJ_CATG_DEFN)	PC_CATG_DEFN_INTFC	See Setting Up Project ChartFields.
Source Types (PROJ_RES_TYPE)	PC_RES_TYPE_INTFC	See Setting Up Project ChartFields.
Subcategories (PROJ_SUBCAT_DEFN)	PC_SUBCAT_DEFN_INTFC	See Setting Up Project ChartFields.
Accounting Rules (PSA_ACCT_SETUP)	PSA_ACCT_SETUP_CI	See Defining Accounting Rules.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface with information on where to find the most current version of each.

In addition, you should become familiar with *PeopleTools: PeopleSoft Setup Manager* and *PeopleTools: PeopleSoft Component Interfaces*.

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2

Navigating in PeopleSoft Project Costing

PeopleSoft Project Costing Custom Navigation

Project Costing provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

> **Note**
>
> In addition to the Project Costing custom navigation pages, PeopleSoft provides menu navigation and standard navigation pages.

See *PeopleTools: PeopleSoft Applications User's Guide*

Pages Used to Navigate in PeopleSoft Project Costing

This table lists the custom navigation pages that you use to navigate in Project Costing:

Page Name	Navigation	Usage
Project Costing Center	**Project Costing**, and then **Project Costing Center**	Access the key areas to manage Project Costing data.
Accounting	Click the **Accounting** link on the Project Costing Center page.	Assign accounting information to transactions that contain project-related adjustments. Initiate the process to select undistributed rows in the Project Transaction table and match them to the appropriate accounting rules that are set up to write journal entries. Review Project Costing accounting entries that have been sent to PeopleSoft General Ledger. View associated journal information. Review Project Costing accounting lines that have not been sent to PeopleSoft General Ledger. Delete erroneous lines.
Asset Capitalization	Click the **Asset Capitalization** link on the Project Costing Center page.	Manage asset capitalization.

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Page Name	Navigation	Usage
Express Capitalization Setup	Click the **Express Capitalization Setup** link on the Asset Capitalization page.	Set up express asset filter criteria, express asset definition, and the Express Capitalization process.
Manage Asset Capitalization	Click the **Manage Asset Capitalization** link on the Asset Capitalization page.	Review assets, define assets, relate assets by project, assign transactions to assets, complete the manual capitalization review, send assets to PeopleSoft Asset Management, and retire assets.
Configuration	Click the **Configuration** link on the Project Costing Center page.	Access options to configure Project Costing.
Activity Options	Click the **Activity Options** link on the Configuration page.	Set up activity types, activity status, activity type status paths, and quality types.
Common Definitions	Click the **Common Definitions** link on the Configuration page.	Set up interest types, period calculation factors, transaction codes, transaction types, report summarization options, and Structured Query Reports.
General Options	Click the **General Options** link on the Configuration page.	Set up the organization hierarchy, accounting rules, transaction summary templates, express asset filter criteria, asset profiles, and budget items.
Installation and Business Unit	Click the **Installation and Business Unit** link on the Configuration page.	Set up project business unit definitions, Project Costing options, Program Management options, Project Costing integration options, Project Costing installation options, Program Management installation options, and general installation options.
Pricing Structure	Click the **Pricing Structure** link on the Configuration page.	Set up rate plans, rate sets, rates by employee, rates by job code, and rates by role.
Project Options	Click the **Project Options** link on the Configuration page.	Set up integration templates, project types, status types, project type status paths, project roles, phase types, events, and project status default values.
Project Security	Click the **Project Security** link on the Configuration page.	Set up security profiles, security options, and row level security.

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Page Name	Navigation	Usage
Sharing Structure	Click the **Sharing Structure** link on the Configuration page.	Set up sharing options, employee exceptions, employee attribute exceptions, sharing rules, project team exceptions, project exceptions, project attribute exceptions, and organization exceptions.
Transaction Options	Click the **Transaction Options** link on the Configuration page.	Set up analysis types, analysis groups, source types, source groups, categories, subcategories, and transaction identifiers. Relate source types to categories, and relate categories to subcategories.
Cost and Revenue Collection	Click the **Cost and Revenue Collection** link on the Project Costing Center page.	Link to other PeopleSoft products for cost and revenue collection.
Cost Collection	Click **Cost Collection** on the Cost and Revenue Collection page.	Request processes to retrieve approved expense information from PeopleSoft Expenses, vouchers from PeopleSoft Payables, requisitions or purchase orders from PeopleSoft Purchasing, purchase order and requisition adjustments from PeopleSoft Purchasing, time and expense transactions from PeopleSoft Services Procurement, estimated gross labor costs and actual labor distributed costs from PeopleSoft Time and Labor, fulfilled demands from PeopleSoft Inventory, customer orders from PeopleSoft Order Management, tools usage data from PeopleSoft Maintenance Management, and post entries or retrieve posted journals from PeopleSoft General Ledger.
Revenue Collection	Click **Revenue Collection** on the Cost and Revenue Collection page.	Request processes to retrieve billing items from PeopleSoft Billing, summarized revenue and billing information from PeopleSoft Contracts, revenue from PeopleSoft Contracts, and accounts receivable items and revenue related adjustments.
Preferences	Click the **Maintain Preferences** link on the Project Costing Center page.	Modify and view user preferences for managing projects.
My Projects	Click the **My Projects** link on the Project Costing Center page.	Create a personalized list of projects.

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Page Name	Navigation	Usage
Project and Activity	Click the **Project and Activity** link on the Project Costing Center page.	Create, modify, and view project and activity information.
Activity Definitions	Click the **Activity Definitions** link on the Project and Activity page.	Create, modify, and view project activities, activity general information, activity status, activity team, and funds distribution.
Project Definitions	Click the **Project Definitions** link on the Project and Activity page.	Create, modify, and view project, project general information, project status, project team, organization, projects list, project initiation checklist, and project milestones.
Project Budgeting	Click the **Project Budgeting** link on the Project Costing Center page.	Create, modify, and finalize project budget plans, details, and versions. Request processes to create and post commitment control budget journals, transfer PeopleSoft Planning and Budgeting transactions to Project Costing, and send project budget amounts to Planning and Budgeting.
Project Transactions	Click the **Project Transactions** link on the Project Costing Center page.	Add projects transactions, review cost transactions, and adjust projects.
Reports and Analysis	Click the **Reports and Analysis** link on the Project Costing Center page.	Review project costing data using reports and interactive reports.
Interactive Reports	Click the **Interactive Reports** link on the Reports and Analysis page.	View project costing interactive reports for flexible analysis, manager transaction review, budget versus actual, and transactions in progress.
Reports	Click the **Reports** link on the Reports and Analysis page.	View project costing reports for analysis group, analysis types, activity types, linked transaction elements, report summarization options, reporting options, transactions, finances, transaction level reports, project budget reviews, and configuring Structured Query Reports.
Utilities	Click the **Utilities** link on the Project Costing Center page.	Use calculation, performance, and third-party integration utilities.

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Page Name	Navigation	Usage
Third-Party Integrations	Click the **Third-Party Integrations** link on the Utilities page.	Load projects, activities, and transaction data into staging tables, review and modify project, activity, and transaction details, create and modify projects from Microsoft Project, update Microsoft Project with project data, manage the Microsoft Project integration details, and administer Microsoft integrators.
Utilities	Click the **Utilities** link on the Utilities page.	Request processes to price rows, calculate percent complete, distribute funds, refresh summary tables, convert currency, compress project data, and delete projects. Copy projects, calculate interest, review the project deletion utility log, identify detailed and summary transactions to archive, and refresh budget summary data.

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3

Setting Up Project Business Units

Understanding the PeopleSoft Project Costing Operational Structure

A business unit in Project Costing is defined as an operational subset of the organization. Defining business units in this way enables you to plan projects and gather business data around the way that you work, without the constraints of the enterprise's standard accounting procedures for financial posting and reporting. Thus, you can organize information to best facilitate project management, analysis, reporting, and accounting.

To decide how to map the operational business structure in Project Costing, you need to examine how the business functions operationally, or how the work gets done.

After mapping the business structure and determining which tablesets to use, you can create business units. Consider these factors when you determine how many business units to create:

- Each project tree is associated with a single project business unit.

  If you want to group projects in one tree for summary reporting, all of the projects should be in the same project business unit. You can do consolidated reporting with many business units, but it is easier to use a tree.

  Because trees are used for allocations, reporting, analysis, and security, it is important to consider the potential impact of maintaining multiple trees.
- A single project business unit can post to as many general ledger (GL) business units as necessary, because you specify an integration template for each project.

> **Note**
>
> This topic contains only part of what you need to know to define the operational structure. Other relevant information is located in the *PeopleSoft Application Fundamentals* subject.

Related Topics

- Understanding PeopleTools Security
  To provide Project Costing users with access to application functions that are essential to performing their jobs, you create security roles and assign them to individual user profiles. Attached to each security role are permission lists which provide access to application pages and processes that are required to perform the job tasks.
- Understanding Project Trees
  PeopleSoft Tree Manager is a PeopleTools utility that is useful with many PeopleSoft applications, including Project Costing. Project trees define how projects are related to one another. The relationships between projects determine the level of detail achieved when tracking and reporting costs.

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- Application Fundamentals: Understanding Oracle's PeopleSoft Allocations Process (FS_ALLC)
- Application Fundamentals: PeopleSoft Application Fundamentals Overview

Understanding Open Period Control

Open period control is used for transactions that are imported into Project Costing from interfacing applications, for transaction adjustments, and for transactions that you add through the Add Transactions functionality in Project Costing. If you use open period control in Project Costing and the accounting date on transactions that you import from other applications falls outside of the open periods that you define for Project Costing, the system modifies the accounting date on the Project Transaction table row so that it falls within the defined periods.

For open period accounting, when you enter a transaction in Project Costing through integration from other applications, the inbound Application Engine process triggers the Accounting Date Validation Application Engine process (PC_DATE) to validate the accounting date. The process of entering transactions online in Project Costing also uses the Accounting Date Validation process to validate accounting dates. The Accounting Date Validation process determines if the accounting period is open or closed by looking up the calendar ID defined at the business unit level, and resets the accounting date, if necessary.

You create calendars at the SetID level by using the menu navigation **Setup Financials/ Supply Chain**, and then **Common Definitions**, and then **Calendars/Schedules.**

See Application Fundamentals: Understanding Accounting Calendars Based on Open and Close Periods.

Both the Process Project Accounting (PSA_ACCTGGL) and the Send to Asset Management (PC_AM) Application Engine processes do not validate open periods.

Example of Open Period Control

Assume that you enable open period control and select *Projects* as the open period source. When you use the PeopleSoft Payables feeder system to send transactions to Project Costing, the Payables to Project Costing Application Engine process (PC_AP_TO_PC) triggers the Accounting Date Validation process to validate the transactions against the Project Costing open period and reset the accounting date. This example contains two transaction rows. For both rows, the Payables to Project Costing process sends a Payables accounting date that is outside of the open period. The Accounting Date Validation process validates and updates the accounting date as shown in the column titled Project Transaction Table Accounting Date:

Project Costing Open Period	Payables Open Period	Payables Accounting Date	Project Transaction Table Accounting Date	Explanation
January 2006 to February 2006	January 2001 to December 2007	December 15, 2005	January 2, 2006	Payables accounting date is earlier than the first Project Costing open period date. The system resets the accounting date to the first work day of the first open period.

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Project Costing Open Period	Payables Open Period	Payables Accounting Date	Project Transaction Table Accounting Date	Explanation
January 2006 to February 2006	January 2001 to December 2007	March 16, 2006	February 28, 2006	Payables accounting date is later than the last Project Costing open period date. The system resets the accounting date to the last work day of the last open period.

Creating Project Business Units

To create project business units, use the Project Costing Business Unit Definition component (PC_BU_DEFN).

Page Used to Create Project Business Units

Page Name	Definition Name	Usage
Project Costing Definition Page	BUS_UNIT_TBL_PC	Create, define, and modify project business units.

Prerequisite

You must establish at least one GL business unit.

Related Topics

- PeopleSoft General Ledger: Understanding General Ledger Business Units and Options

Project Costing Definition Page

Use the Project Costing Definition page (BUS_UNIT_TBL_PC) to create, define, and modify project business units.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Definition**

This example illustrates the fields and controls on the Project Costing Definition page.

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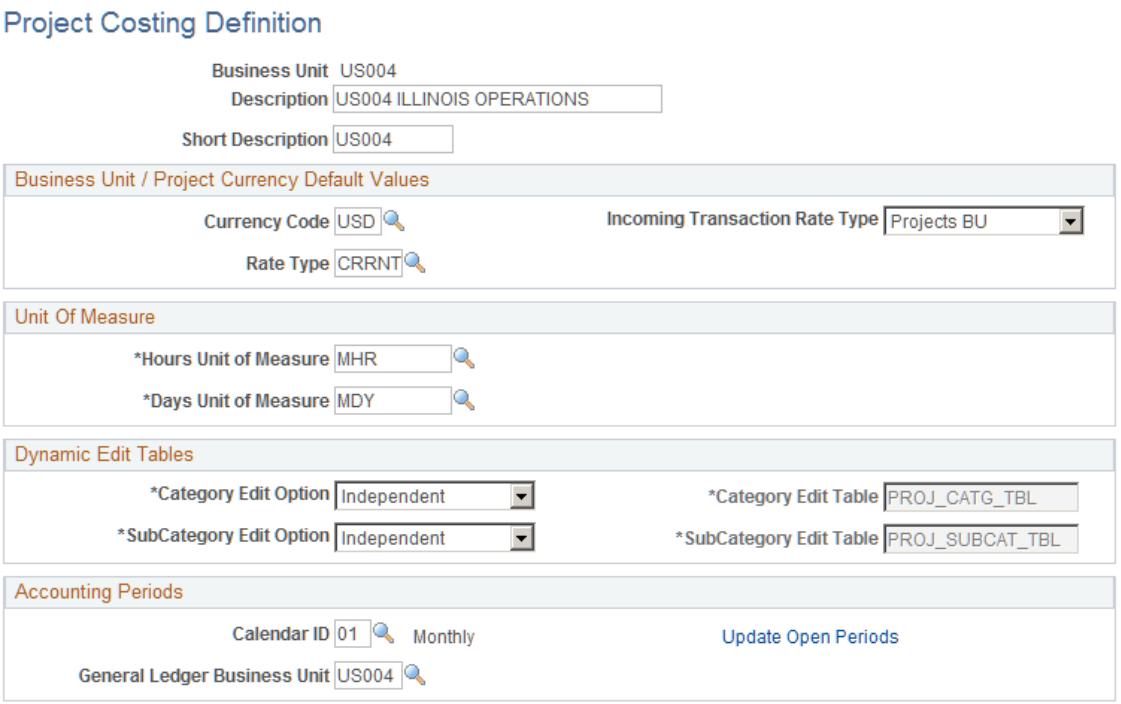

> **Note**
>
> Create business unit IDs that are exactly five characters long. Depending on the operating system, performance degradation can occur if business unit IDs have fewer than five characters.

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Field or Control	Description
Default SetID	Enter the default SetID from the available values to associate with this business unit. To establish a new SetID, enter the same name as the business unit ID that you are creating. The default SetID is used to set up tableset sharing by determining the SetID that is assigned to each record group for the new business unit. The SetID that is assigned to a record group determines which tableset is used to determine valid values for that specific business unit. You can modify the default SetID for the record group on the TableSet Control - Record Group page. This field is available in Add mode. However, if you create a new project business unit with the same name as an existing business unit in PeopleSoft General Ledger or PeopleSoft Receivables, then the **Description** field is automatically populated and the **Default SetID** field does not appear. **Note:** Until you create the business unit, you cannot attach the calendar and GL business unit to the new business unit. SetIDs are defined on the TableSet Control page in PeopleSoft PeopleTools. See *PeopleTools: System and Server Administration*
Create FS BU (create Financials business unit)	Click to create the business unit. This button appears only in Add mode.

Business Unit / Project Currency Default Values

Field or Control	Description
Currency Code	Enter the base currency for this business unit. This field serves two purposes. First, for all new projects created for this business unit, this currency code becomes the default currency code for the newly created project. You can override this default value during project creation. Second, this value is the base currency for the business unit. For all transactions that are stored in the Project Transaction table (PROJ_RESOURCE), the system stores two amounts. The Project Transaction table stores the source transaction amount (the foreign amount) and then converts this amount to the base currency identified at the project business unit level. A project's currency code can differ from the project business unit's base currency. Currency codes are defined on the Currency Code page. See PeopleSoft Global Options and Reports: Maintaining Currency Tables.

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Field or Control	Description
Incoming Transaction Rate Type	Select the rate type on which multicurrency processing is based. Available options are: • *Projects BU:* Use the project business unit's conversion method as defined in the **Rate Type** field on this page. • *Source:* Use the conversion method that is used by the feeder application from which the incoming transaction originates. Valid options are based on either the project business unit or the source transaction with the default value set at the project business unit. If you select the *Source* option, all multicurrency conversions will use the rate type that is passed with the source transaction. If you select *Projects BU,* all multicurrency conversions will be performed based on the rate type chosen at the project business unit level. Multicurrency conversions only occur when the feeder system's base currency is different than the Project Costing business unit currency. If the base currency of the feeder system is the same as the Project Costing business unit currency, then the multicurrency conversion process does not occur and the base amount becomes the Project Costing resource amount. For Contracts-related billing and revenue priced rows, the contract currency code and rate type determines the final priced amount.
Rate Type	Enter the default rate type to use for currency conversions that occur for this business unit. Rate types are defined on the PeopleSoft Global Options and Reports: Rate Type Pagelocated at **Setup Financials/Supply Chain**, and then **Common Definitions**, and then **Market Rates**, and then **Market Rate Type.** For more information about market rates, see PeopleSoft Global Options and Reports: Defining Market Rates

Unit of Measure

Use this group box to define default values that are used for analysis and PeopleSoft Program Management scheduling. The system uses these fields to convert all units of measure into hours or days.

Field or Control	Description
Hours Unit of Measure	Enter the unit of measure that represents hours for the organization. Units of measure are defined on the Units of Measure page. The default value is *MHR* (Work Hour). See Application Fundamentals: Defining Additional Common Information.
Days Unit of Measure	Enter the unit of measure that represents days for the organization. The default value is *MDY* (Person Day).

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Dynamic Edit Tables

Field or Control	Description
Category Edit Option	Specify whether category prompt lists display all values that are in the system, or a subset based on dependencies that are established among source types, categories, and subcategories. Available options are: *Independnt* (independent): All categories that are in the system are available for selection. Project Costing uses the Project Resource Category record (PROJ_CATG_TBL) to populate prompt lists. *Override:* Categories that are available for selection are restricted by established criteria. Project Costing uses the selected category edit table to populate prompt lists. *Related:* Categories that are available for selection are restricted by predefined relationships with source types. Project Costing uses the Project Type Category record (PROJ_TYPE_CATVW) to populate prompt lists. You can select the *Related* option only if the Source Type ChartField is selected on the Standard ChartField Configuration page. If you select *Related* and Source Type ChartField is inactive, an error message appears when you save the page, indicating that you cannot specify a Category Edit Option of *Related* because the Source Type ChartField is inactive. Available category edit options are based on the translate values in the Category Edit Options field (CAT_EDIT_OPTION) properties. The default value is *Independnt*.

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Field or Control	Description
SubCategory Edit Options	Specify whether subcategory prompt lists display all values that are in the system, or a subset based on dependencies that are established among source types, categories, and subcategories. Values are: *Independnt* (independent): All subcategories that are in the system are available for selection. Project Costing uses the Project Resource SubCategory record (PROJ_SUBCAT_TBL) to populate prompt lists. *Override:* Subcategories that are available for selection are restricted by established criteria. Project Costing uses the selected subcategory edit table to populate prompt lists. *Related:* Subcategories that are available for selection are restricted by predefined relationships with resource category types. Project Costing uses the Project Category SubCategory record (PROJ_CAT_SUB_VW) to populate prompt lists. You can select the *Related* option only if the Category ChartField is selected on the Standard ChartField Configuration page. If you select *Related* and the Category ChartField is inactive, an error message appears when you save the page, indicating that you cannot specify a SubCategory Edit Option of *Related* because the Category ChartField is inactive. Available values are based on the translate values in the SubCategory Edit Options field (SUB_EDIT_OPTION) properties. The default value is *Independnt.*

Accounting Periods

Field or Control	Description
Calendar ID	After you create the business unit, select the calendar that is used for such things as open period accounting and allocations from the Project Transaction table. See Define Allocation Step - Pool Page.
Update Open Periods	Click to access the Open Period Update page in a new browser window in PeopleSoft General Ledger to modify project source transaction settings for open period validation. You must create the business unit before you can access the Open Period Update page. Close the new browser window to return to the Project Costing Definition page.

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Field or Control	Description
General Ledger Business Unit	If open period control is enabled on the Installation Options - Project Costing page, enter the GL business unit for the selected calendar ID that the system uses to validate accounting dates. You must select a calendar ID before you select a general ledger business unit. If open period is enabled and the open period source is *Projects*, when you select the calendar ID and associated GL business unit, the system creates a row in the Open Periods by Products table (FIN_OPEN_PERIOD) and Business Unit Mapping table (FIN_BU_MAPPING). This enables you to update the project calendar for open period control. See Application Fundamentals: Defining and Updating Open Periods and Adjustment Periods.

Related Topics

- Processing Multiple Currencies
- Understanding General Control Data
  By using control data, you can group Project Costing elements to facilitate system processing, increase system performance, and aid in analyzing and reporting project data. This topic provides an overview of three kinds of general control data:
- Application Fundamentals: Defining and Updating Open Periods and Adjustment Periods

Defining Project Options

To define project options for business units, use the Project Costing Options component (PC_BUS_UNIT_OPT). Use the Project Costing Business Unit Options component interface (PROJECT_BU_OPTIONS) to load data into the tables for this component.

Pages Used to Define Project Options

Page Name	Definition Name	Usage
Project Costing Options Page	BUS_UNIT_OPT_PC	Establish project-related transaction fields that are required for importing transactions from other PeopleSoft applications. Establish the method for calculating the percent complete value for all projects and activities in the business unit.

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Page Name	Definition Name	Usage
Budget Row Versioning Page	PC_BUD_VER_HST_CFG	Enable budget row versioning for the business unit, and define the sequence of analysis types that the system uses to distinguish historical cost and revenue budget plan versions.
Copy Template Option 1 Page	PC_CPY_TMPL_PNL1	Specify the project tables that the system copies into a new project from a template.
Copy Template Option 2 Page	PC_CPY_TMPL_PNL2	Specify the activity and transaction tables that the system copies into a new project from a template, and define parameters analysis groups.
Delete Utility Tables Page	PC_DEL_PROJ_REC_PG	Define the parameters for deleting projects, activities, and transactions for a specified business unit.

Project Costing Options Page

Use the Project Costing Options page (BUS_UNIT_OPT_PC) to establish project-related transaction fields that are required for importing transactions from other PeopleSoft applications.

Establish the method for calculating the percent complete value for all projects and activities in the business unit.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Options**

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

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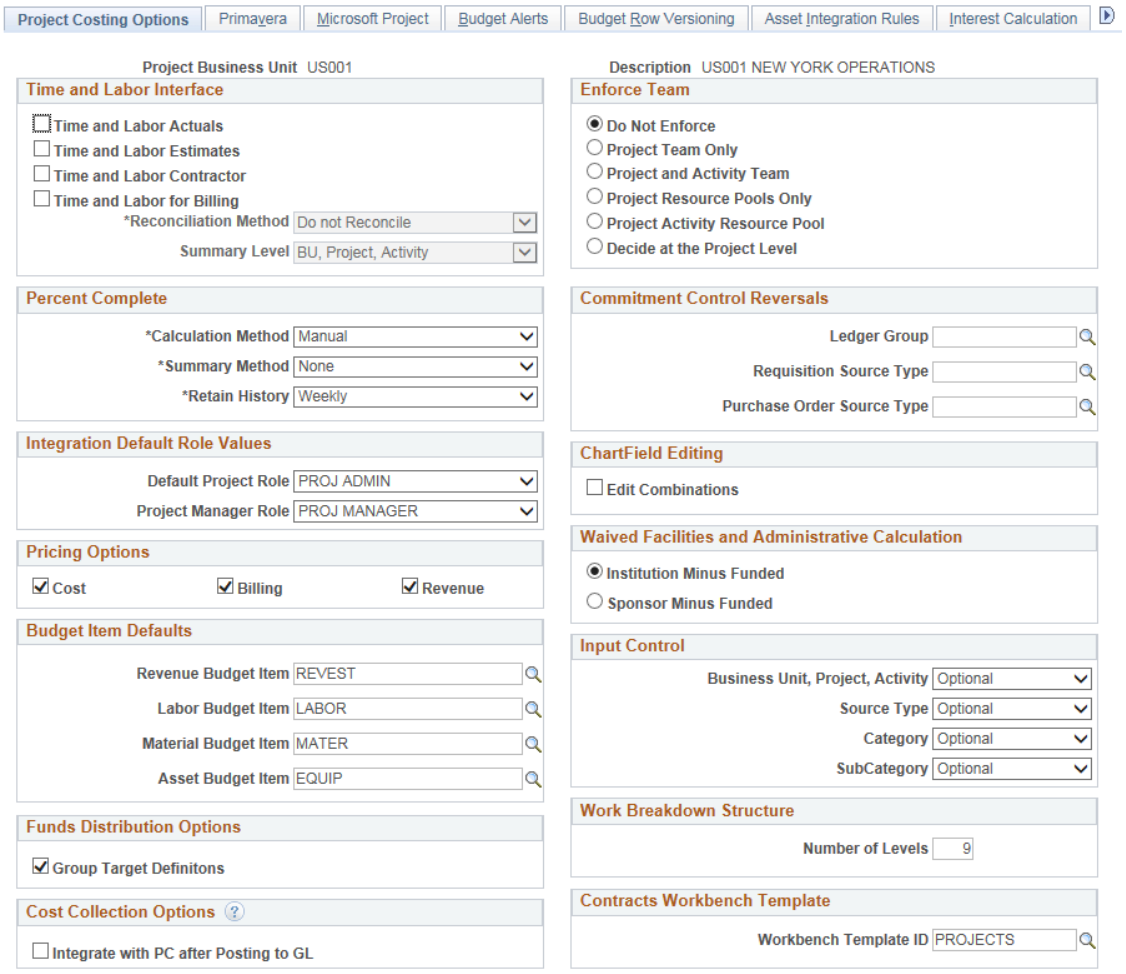

Use the Project Costing Options page to define required criteria relating to transactions that enter Project Costing from other PeopleSoft applications.

If you modify the settings on the Project Costing Options page, the system does not modify existing project settings. The system applies the modified settings only to new projects.

Time and Labor Interface

Select the type of data to import from PeopleSoft Time and Labor into PeopleSoft Project Costing. If you select **Time and Labor for Billing,** also select a reconciliation method.

You select the analysis types for rows that you import from PeopleSoft Time and Labor on the Installation Options - Project Costing Integration page.

Field or Control	Description
Time and Labor Actuals	Select to import payroll expenses into PeopleSoft Project Costing after the close of a payroll period.
Time and Labor Estimates	Select to import estimates into Project Costing for the open pay period.
Time and Labor Contractor	Select to import contractor time and labor for this business unit after the close of a payroll period.

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Field or Control	Description
Time and Labor for Billing and **Reconciliation Method**	Select to create separate time and labor for billing rows after the close of a payroll period as part of estimate processing. Amounts are subject to change. If you select this option, also select from the list of **Reconciliation Method** options to reconcile the difference between actual time and labor costs with previously entered estimated time and labor costs. Each reconciliation creates a delta row in the Project Transaction table with the same analysis type as the transaction that you are reconciling. Available options are: • *Both Quantity and Amount* (reconcile by both quantity and amount) • *Do Not Reconcile* • *Reconcile by Amount* • *Reconcile by Quantity*
Reconciliation Method	Select a reconciliation method to use as a default for the business unit. **Note:** If using Time and Labor summarization, this option is not applicable because all existing estimates are reversed and new estimates, or actual, payroll expenses are inserted and summarized based on the summarization template, regardless of the value selected in this field. Time and Labor summarization is indicated by selecting the Time and Labor check box in the Summarization Options group box on the Project Costing Integration page.

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Field or Control	Description
Summary Level	Select the level at which the system summarizes reconciliations. This affects the number of delta rows that are created during the reconciliation process. If the reconciliation method is not *Do Not Reconcile,* the selection of a summary level is defaulted into the project business unit options at save time with a default value of business unit, project, and activity. At a minimum, if you enable reconciliation, delta transaction rows are grouped by employee ID, business unit, project, and activity, and they cascade down from there. For example, if you summarize by category, then the transaction rows are grouped by employee ID, business unit, project, activity, and category. This field is not available if you select *Do Not Reconcile* as the reconciliation method for the **Time and Labor for Billing** option. **Note:** If using Time and Labor summarization, this option is not applicable because all existing estimates are reversed and new estimates, or actual, payroll expenses are inserted and summarized based on the summarization template, regardless of the value selected in this field. Time and Labor summarization is indicated by selecting the Time and Labor check box in the Summarization Options group box on the Project Costing Integration page.

Enforce Team

Determine who can charge time, expenses, or both, to a project or activity based on the team membership. Define at what level (business unit level or project level) the decision is made to enforce team restrictions, and to what extent.

If you select any option other than the *Decide at Project Level* option on the Project Costing Options page, the selection applies to all future projects that you create for the business unit and cannot be modified at the project level. If you select the *Decide at Project Level* option at the business unit level, users can specify a team security option on the Project Costing Definition Page for each project.

Field or Control	Description
Do Not Enforce	Select to make the team restriction decision at the business unit level for all projects that belong to the business unit. There is no restriction on charging time or expenses to projects, so the **Products** drop-down list box does not appear when you select this option. You cannot override this option at the project and activity team level.

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Field or Control	Description
Project Team Only	Select to make the team restriction decision at the business unit level for all projects that belong to the business unit, and restrict the charging of time and expenses to project team members. The **Products** drop-down list box appears when you select this option. You cannot override this option at the project and activity team level.
Project and Activity Team	Select to make the team restriction decision at the business unit level for all projects that belong to the business unit, and restrict the charging of time and expenses to project or activity team members based on the **Enforce Team** option that you select on the Activity Definitions - Definition page. The **Products** drop-down list box appears when you select this option. You cannot override this option at the project and activity team level.
Project Resource Pools Only	Select to enable only resources that belong to the project's resource pools to charge time and expense against the project in the PeopleSoft Expenses application. This option is available only for the PeopleSoft Expenses application and not the PeopleSoft Time and Labor application. Therefore, if you select this option, the *Expenses* value appears in the **Products** field and is not editable. This option appears only if both PeopleSoft Program Management and PeopleSoft Resource Management are installed. **Note:** Project managers use the Project Resource Pool page to specify project resource pools. For more information about resource pools, see the PeopleSoft Program Management: Project Resource Pools Page topic.

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Field or Control	Description
Project Activity Resource Pool	Select to enable only resources that belong to the activity's resource pools to charge time and expense against the activity in the PeopleSoft Expenses application. This option is available only for the PeopleSoft Expenses application and not the PeopleSoft Time and Labor application. Therefore, if you select this option, the *Expenses* value appears in the **Products** field and is not editable. You cannot select this option if the Activity Costing Level option is selected as the project charging level on the Program Management Options page. This option appears only if both PeopleSoft Program Management and PeopleSoft Resource Management are installed. **Note:** Project managers use the Activity Resource Pool page to specify resource pools for each of the project's activities. See PeopleSoft Program Management: Program Management Options Page. See PeopleSoft Program Management: Activity Resource Pools Page.
Decide at the Project Level	Select to defer the decision to restrict charges to the project manager for each project that belongs to the business unit. The project manager uses the Project Costing Definition page to specify the extent to which restrictions are imposed. The **Products** drop-down list box does not appear when you select this option.
Products	Available product options are: *Exp and TL* Expenses and Time and Labor): Select to allow project and activity team members to charge to the project from both PeopleSoft Expenses and PeopleSoft Time and Labor. *Expenses:* Select to allow project and activity team members to charge to the project only from PeopleSoft Expenses. *Time&Labor:* Select to allow project and activity team members to charge to the project only from PeopleSoft Time and Labor.

Note

PeopleSoft Time and Labor does not enforce project activity team. If you select the **Project and Activity Team** option, and select the *Exp and TL* or *Time&Labor* product option, the system restricts PeopleSoft Time and Labor users for projects to which they can charge time. However, PeopleSoft Time and Labor users can charge time to any activity on a particular project if they have security access to the project.

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> **Note**
>
> Prompt tables are synchronized between the Financial Management Solutions (FMS) and Human Capital Management (HCM) by using the PROJECT_FULLSYNC message in application messaging. If project team enforcement takes place at the business unit level, you must run the PROJECT_FULLSYNC process manually.

Percent Complete

You can manually enter the percent complete for a project and activities, or have the system automatically calculate this value.

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Field or Control	Description
Calculation Method	Select a method to calculate the percent complete value. Available options are: *Budget Amount:* This option bases the calculation on budgeted and actual amounts. Use the analysis group that you specify in the **Cost Budget** field on the Project Costing Definition page to determine what constitutes the budgeted amount. There must be a finalized budget posted to the Project Transaction table for the calculation to return a value. The percent complete equation is: (Actual Amount ÷ Budgeted Amount) × 100 *Budget Hours:* This option behaves similarly to the Budget Amount option, except that it bases the calculation on the number of hours that are budgeted to complete the activity, as in this equation: (Actual Hours ÷ Budgeted Hours) × 100 *Duration:* This option is available only if you use PeopleSoft Program Management. It bases the calculation on the number of days that are allotted to complete the activity, as in this equation: ((Total Days − Remaining Days) ÷ Total Days) × 100 *Forecast Amount:* This option compares the actual amount against the estimate at completion (EAC). The EAC is actual amount plus the estimate to completion (ETC). Use the analysis group that you specify in the **Forecast** field on the Project Costing Definition page to determine what constitutes the EAC amount. ETC transactions must be loaded to the Project Transaction table for the calculation to return a value. The equation for this option is: (Actual Cost Amount ÷ EAC Amount) × 100 *Forecast Hours:* This option behaves similarly to the **Forecast Amount** option, except that it compares hours instead of amounts. The equation is: (Actual Cost Hours ÷ EAC Hours) × 100 *Manual:* This option bases the calculation on manual entry of percent complete. If you select this option, only the *None* and *Straight-Line* summary methods are available for selection in the **Summary Method** field. If you select the *Budget Amount* or *Forecast Amount* option, the percent complete calculation includes only transactions with the same unit of measure (UOM) as specified in the **Hours Unit of Measure** field on the Project Costing Definition page for the business unit, or that have a conversion rate defined for the project business unit hours UOM on the Unit of Measure page. If you use PeopleSoft Program Management and select a project charging level of *Activity*

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Field or Control	Description
	Costing Level on the Program Management Options page, the Percent Complete Application Engine process (PC_PERCENT) evaluates only activities in the project charging level that have transactions associated with them. The system ignores planning activities. This affects the percent calculation if you select *Budget Amount, Budget Hours, Forecast Amount,* or *Forecast Hours* as the calculation method. Finalizing Budgets See Project Definitions - Project Costing Definition Page. See Application Fundamentals: Units of Measure Page. See PeopleSoft Program Management: Understanding Project Charging Levels.
Summary Method	Select a method that the system uses to roll up activity completion percentages to the project. Available methods are: • *None:* The system does not summarize the percent complete value. • *Straight-Line:* Adds the individual activity percent complete values for the project, and divides that amount by the total number of activities. • *Weighted:* Adds the actual amounts, duration, or units for all activities, and divides that amount by the total budgeted value for the project. (Total Hours Worked for each Activity ÷ Total Hours Budgeted for each Activity) × 100

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Field or Control	Description
Retain History	Select the frequency in which the system retains the percent complete data. Available options are: *Daily:* The system retains the results of the final run of the Percent Complete process each day in the Project Percent Complete (PC_PROJ_PERCENT) and Activity Percent Complete (PC_ACT_PERCENT) history tables. For example, if the Percent Complete process runs five times a day, the system retains the values from the fifth run of the day in the history tables with an effective date of that day. *Monthly:* The system retains the results of the final run of the Percent Complete process each month in the history tables with an effective date of the first day of the month. The calendar is specified in the **Monthly Calendar** field in the **Reporting Roll Up Calendars** group box on the Installation Options - Project Costing page. *Quarterly:* The system retains the results of the final run of the Percent Complete process each quarter in the history tables. The calendar is specified in the **Quarterly Calendar** field in the **Reporting Roll Up Calendars** group box on the Installation Options - Project Costing page. *Weekly:* The system retains the results of the final run of the Percent Complete process each week in the history tables. This is the default value. The calendar is specified in the **Weekly Calendar** field in the **Reporting Roll Up Calendars** group box on the Installation Options - Project Costing page. **Note:** If the percent complete calculation method is *Manual*, the system retains the percent complete value that you enter on the Project Definitions - General Information, Activity Definitions - General Information, and Project Activities pages in the history tables based on the selected retain history option.

Commitment Control Reversals

To set up reversal amounts for project commitments, select a Commitment Control ledger group, requisition source type, and purchase order source type. The Purchasing Adjustment Application Engine process (PC_POADJUST) uses the Ledger Group field, and Requisition Source Type or Purchase Order Source Type fields, in addition to the purchase order or requisition numbers from the Project Transaction table, to identify rows in the Commitment Control Liquidation table (KK_LIQUIDATION). The process copies the corresponding rows to the Project Transaction table.

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Integration Default Role Values

Field or Control	Description
Default Project Role	Specify the default project role for the system to use when copying project and activity team members from third-party applications to Project Costing.
Project Manager Role	This field is no longer used

ChartField Editing

Select the **Edit Combinations** check box to enable ChartField combination editing when integrating with PeopleSoft General Ledger.

Pricing Options

Select options in this group box that the Pricing Application Engine process (PC_PRICING) uses when it is triggered by incoming Application Engine processes or through the Add Transactions functionality in Project Costing. Examples of incoming Application Engine processes are the Payables to Project Costing process (PC_AP_TO_PC) and the Time and Labor to Project Costing process (PC_TL_TO_PC). In this case, the Pricing process uses the pricing options that you select on this page for the business unit of each transaction row that it processes. The Pricing process triggers the Limits Application Engine process (CA_LIMIT), which processes the same type of transaction rows (revenue, billing, or both).

Field or Control	Description
Cost	Select to use this option as a default pricing option for the business unit on the Pricing run control page. You can override this pricing option when you run the process.
Billing	Select to use the billing option as a default pricing option for the business unit on the Pricing run control page. You can override this option on the run control page.
Revenue	Select to use the revenue option as a default pricing option for the business unit on the Pricing run control page, and as a default processing option on the Limits run control page in PeopleSoft Contracts if you run the Limits process manually. You can override this option on the run control pages.

Waived Facilities and Administrative Calculation

Select either **Institution Minus Funded** or **Sponsor Minus Funded** to tell the system how you want to calculate waived and cost-shared facilities and administration amounts. The system uses this option only if you choose to calculate waived or cost shared amounts in the Facilities Admin Options page in PeopleSoft Grants.

This group box appears only if you install PeopleSoft Grants.

See PeopleSoft Grants: Establishing Facilities and Administration and Direct-Cost Cost-Sharing Options.

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Budget Item Defaults

Field or Control	Description
Revenue Budget Item	Select the revenue budget item that the Distribute Costs to Budgets Application Engine process (PGM_SPREAD) uses as the default budget item when it creates revenue budget rows. The default value is *REVEST.* The revenue budget item that you enter on this page appears in the Bill tab on the PeopleSoft Program Management: Resources by Activity Page. **Note:** To create cost budget rows, the Distribute Costs to Budgets process uses budget items that you specify for each resource row in the Cost tab of the Resources by Activity page.
Labor Budget Item	Select the default budget item for labor resources that are loaded via the Third-Party Loader process (PC_INTF_GEN).
Material Budget Item	Select the default budget item for material resources that are loaded via the Third-Party Loader process (PC_INTF_GEN).
Asset Budget Item	Select the default budget item for asset resources that are loaded via the Third-Party Loader process (PC_INTF_GEN).

Input Control

Specify the fields that are required when you enter transactions for this business unit in PeopleSoft cost feeder applications and directly in Project Costing through the Add Transactions page. Values are *Required* or *Optional.*

> **Note**
>
> A project business unit, project, and activity are always required when you enter transactions directly in Project Costing.
>
> If you select *Required* for **Category** or **SubCategory** input control for any business unit, you cannot inactivate those ChartFields on the Standard ChartField Configuration page.

Work Breakdown Structure

The work breakdown structure (WBS) is a visual representation of a project, typically in a hierarchical view or Gantt chart view, that shows project activities. The WBS level is stored in the PROJ_ACTIVITY table.

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Field or Control	Description
Number of Levels	Select the number of WBS levels for the business unit. The maximum number of levels is 26. You can create a structure on the Project Activities page up to the number of levels that you enter. The maximum number of levels is also available when using the Expand option on the Project Activities page.

Funds Distribution Options

If the **Enable Funds Distribution** check box is selected on the Application Fundamentals: Installation Options - Project Costing Integration Page, then this group box is shown.

If the **Enable Fund Distribution** check box is deselected on the Project Costing Integration page, then this group box is hidden.

Field or Control	Description
Group Target Definition	The initial value of this field defaults from the Installation Options - Project Costing Integration page. You can override the value set at the installation level for individual Project Costing business units on this page. The saved value of this field defaults to the Project Costing Definition page. Select to indicate that the funding source rules can be grouped manually. Each target definition can be associated to a set of rules. Deselect to indicate that each funding source rule will be associated with separate target definition.

See Also, Understanding Projects and Understanding Funds Distribution.

Cost Collection Options

Field or Control	Description
Integrate with PC after Posting to GL	Select this check box as an indication for the system to integrate with Project Costing only after posting the transactions in General Ledger. The transactions here refer only to the voucher accounting entries from Payables and expense reports from Expenses.

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Contracts Workbench Template

Field or Control	Description
Workbench Template ID	Enter the template ID that the system uses when a user views Project Costing data in the Contracts Workbench for this business unit. The only templates that are available to choose from are those where *Project Costing* was selected in the **Workbench Type** field. PeopleSoft delivers the PROJECTS template, which is the default template for all Project Costing business units.

Related Topics

- Application Fundamentals: Understanding ChartField Combination Editing
- PeopleSoft Grants: Project Costing Options Page

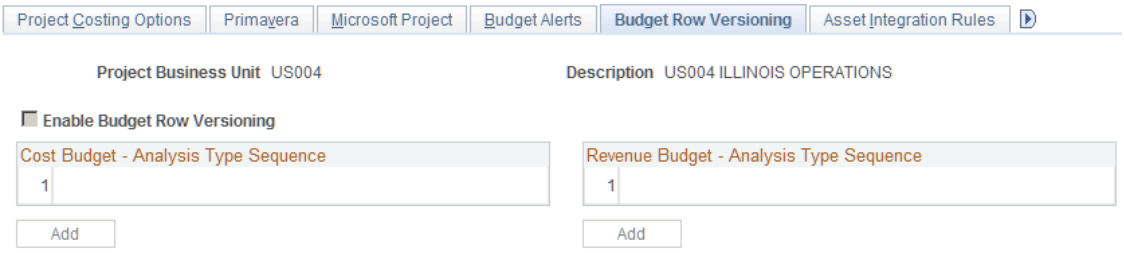
Budget Row Versioning Page

Use the Budget Row Versioning page (PC_BUD_VER_HST_CFG) to enable budget row versioning for the business unit, and define the sequence of analysis types that the system uses to distinguish historical cost and revenue budget plan versions.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Options**, and then **Budget Row Versioning**

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



> **Note**
>
> Before you can define the analysis types and sequences to use to create budget plan versions, you must set up analysis types in the Analysis Types component (PROJ_ANALYSIS_TYPE) to use to distinguish budget rows for particular budget plan versions.

See Analysis Types Page.

This PeopleSoft application delivers a series of analysis types and groups that you can use to distinguish historical cost and revenue budget versions.

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See Budget Plan Versions.

The system uses two different analysis type sequences to distinguish budget plan versions—one sequence for cost budget plan versions and one for revenue budget plan versions.

Field or Control	Description
Enable Budget Row Versioning	Select to activate budget row versioning for the business unit. When this option is active, historical versions of finalized cost and revenue budget plans are stored in the Project Transaction table for analysis or reporting. You cannot enable budget row versioning if Commitment Control is enabled for Project Costing on the Application Fundamentals: Installation Options - Products Page.
Cost Budget Analysis Type Sequence and **Revenue Budget Analysis Type Sequence**	Enter a series of analysis types to represent historical cost and revenue budget versions. You can use the analysis types that are delivered with the system for this purpose, or create your own sequences. Enter as many analysis types as needed for each sequence. You must enter analysis types in the order that you want them to be assigned by the system to historical budget versions. When budget row versioning is enabled, the first time that you finalize a project budget for the business unit, the system assigns the first analysis type in the cost or revenue budget sequence on this page to a copy of the budget plan rows. Each subsequent time that you finalize the budget for this project, the system updates a copy of the new finalized budget rows with the next available analysis type from the sequence. The budget version is assigned on a project-by-project basis. You cannot enter an analysis type that is associated with an analysis group that you specify for **Cost Budget, Revenue Budget, Actual Cost,** or **Actual Revenue** in the **Analysis Group Defaults** group box on the Installation Options - Project Costing page.
Add	Click to append analysis types to the sequence.

After you enter analysis types and save the page, you can append analysis types to the sequence, but you cannot change an existing analysis type or change the sequence order.

You are not required to create an analysis type sequence in ascending alphanumeric order. The system maintains a separate sequence number for each analysis type on this page. Each time that you add an analysis type, the system increments the Sequence Number field (SEQ_NBR) for the budget type (cost or revenue). The **Sequence Number** field is not visible on the user interface. The system uses the field to determine the next available budget version analysis type when you finalize a project budget plan.

Related Topics

- Maintaining Budget Plan Versions

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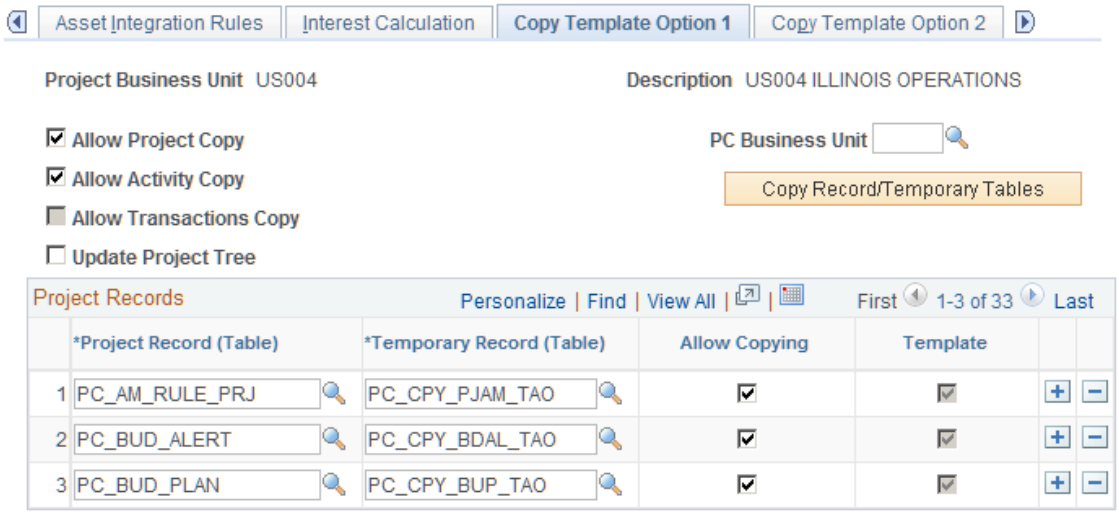
Copy Template Option 1 Page

Use the Copy Template Option 1 page (PC_CPY_TMPL_PNL1) to specify the project tables that the system copies into a new project from a template.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Options**, and then **Copy Template Option 1**

This example illustrates the fields and controls on the Copy Template Option 1 page. You can find definitions for the fields and controls later on this page.



Use this page to configure both the Project Copy and Project Templating features. Also use this page to specify the tables that contain field values that the system copies into a new project that you create from a template.

For Project Copy, you can select the **Allow Project Copy, Allow Activity Copy,** and **Allow Transaction Copy** check boxes to enable this feature at the project business unit level. Then, you indicate at the project business unit level which records are eligible for copying field values from one project to another.

The Project Templating feature does not use the **Allow Project Copy, Allow Activity Copy,** or **Allow Transaction Copy** check boxes to determine if you can create a project from a template. The system makes that determination based on security for project creation. The eligible records that the system uses to create projects and field values from templates are based on the selected records in the Template column.

Field or Control	Description
Allow Project Copy	Select to include project definitions in a project that you copy from an existing project. The system copies the field values from the tables that are listed in the **Project Records** grid from the existing project to the new project.

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Field or Control	Description
Allow Activity Copy	Select to include activity definitions in a new project that you create from an existing project. The system copies the field values from the tables that are listed in the **Activity Records** grid on the Copy Template 2 page from the existing project to the new project.
Allow Transactions Copy	Select to include transactions in a new project that you create from an existing project. The system copies the transactions from the tables that are listed in the **Transaction Records** grid on the Copy Template 2 page from the existing project to the new project. You cannot copy transactions from one project to another if you use Commitment Control or Projects Budgeting. Therefore, the **Allow Transactions Copy** check box is not available for selection if Commitment Control is enabled for Project Costing on the Installation Options - Products page.
Update Project Tree	Select to insert the new project into a project tree.
PC Business Unit (project business unit)	Enter a business unit to use with **Copy Record/Temporary Tables** function.
Copy Record/Temporary Tables	Click to copy record settings of the business unit that is selected in the **PC Business Unit** field to this template. **Note:** Project Costing delivers standard and temporary Project Records in Business Unit US003, which you can use as a guideline for all Project Records that can be used in the Project Copy and Project Templating features.
Allow Copying	Select the check box corresponding to the project-level records from which you want to copy field values for an existing project into a new project. **Note:** You must also select the **Allow Project Copy** option for the system to copy the selected records and their field values.
Template	When you select the **Allow Copying** check box for a row, the system automatically selects the **Template** check box if the record is eligible to be copied to create projects from templates. This check box is not editable. This column does not restrict data that is saved in the database tables for a project template.

This table lists the records and temporary records that are available for performing the project copy and project templating process:

Project Record (Table)	Temporary Record (Table)	Used for Project Copy, Project Templating, or Both
PC_AM_RULE_PRJ	PC_CPY_PJAM_TAO	Both
PC_BUD_ALERT	PC_CPY_BDAL_TAO	Both

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Project Record (Table)	Temporary Record (Table)	Used for Project Copy, Project Templating, or Both
PC_BUD_PLAN	PC_CPY_BUP_TAO	Both
PC_PIC_ADD_TBL	PC_CPY_PICA_TAO	Copy
PC_PIC_STUS_TBL	PC_CPY_PICS_TAO	Copy
PC_PROJHEALTH	PC_CPY_HLTH_TAO	Both
PC_SR_DATES	PC_CPY_SRDT_TAO	Copy
PC_SR_FRQS	PC_CPY_SRFQ_TAO	Copy
PGM_ACTION_PLAN	PC_CPY_RKAP_TAO	Copy
PGM_PRL_QL_ATTR	PC_CPY_ATTR_TAO	Both
PGM_PRL_QL_ATVL	PC_CPY_ATVL_TAO	Both
PGM_PRL_QL_COMP	PC_CPY_COMP_TAO	Both
PGM_PRL_QL_DEG	PC_CPY_DEG_TAO	Both
PGM_PRL_QL_LIC	PC_CPY_LIC_TAO	Both
PGM_PRL_QL_LNG	PC_CPY_LNG_TAO	Both
PGM_PRL_QL_MEM	PC_CPY_MEM_TAO	Both
PGM_PRL_QL_NOTE	PC_CPY_NOTE_TAO	Both
PGM_PROJ_RISK	PC_CPY_RISK_TAO	Copy
PGM_RISK_NOTES	PC_CPY_RKNT_TAO	Copy
PGM_RISK_TRIGGR	PC_CPY_RKTG_TAO	Copy
PROJ_APPROVAL	PC_CPY_PJAP_TAO	Both
PROJ_DOCUMENT	PC_CPY_PDOC_TAO	Copy
PROJ_EV_APPROVE	PC_CPY_EVAP_TAO	Both
PROJ_JUSTIFY	PC_CPY_PJUS_TAO	Both
PROJ_LOCATION	PC_CPY_PLOC_TAO	Both
PROJ_TEAM_SCHED	PC_CPY_TMSC_TAO	Both
PROJECT	PC_CPY_PROJ_TAO	Both
PROJECT_DESCR	PC_CPY_DESC_TAO	Both
PROJECT_MGR	PC_CPY_MGR_TAO	Both
PROJECT_SCHED	PC_CPY_PSCH_TAO	Both
PROJECT_STATUS	PC_CPY_PSTA_TAO	Both
PROJECT_TEAM	PC_CPY_TEAM_TAO	Both
PSA_ORGPRJ_DEFN	PC_CPY_PORG_TAO	Copy

Copy Template Option 2 Page

Use the Copy Template Option 2 page (PC_CPY_TMPL_PNL2) to specify the activity and transaction tables that the system copies into a new project from a template, and define parameters analysis groups. This page enables you to define parameters for copying activities, transactions, and analysis groups as well.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Options**, and then **Copy Template Option 2**

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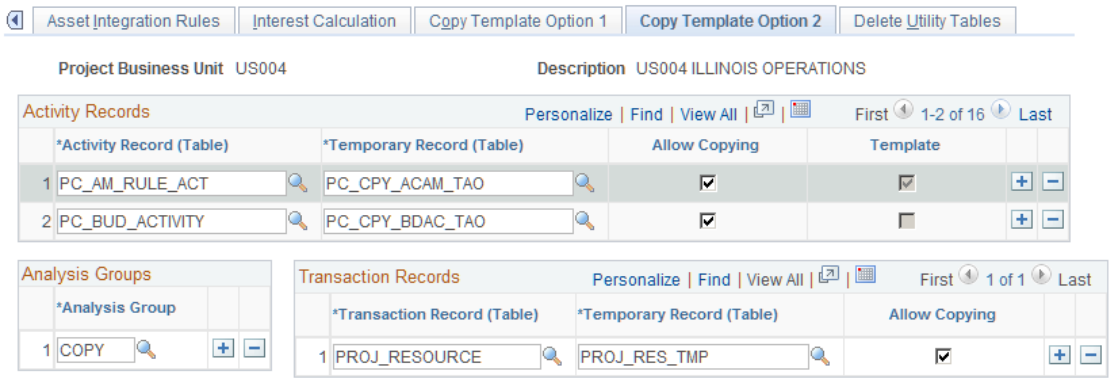
This example illustrates the fields and controls on the Copy Template Option 2 page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Allow Copying	Select the check box corresponding to the activity-level records from which you want to copy field values for an existing project into a new project. The system copies the selected records and their field values only if you select the **Allow Activity Copy** option on the Copy Template 1 page.
Template	When you select the **Allow Copying** check box for a row, the system automatically selects the **Template** check box if the record is eligible to be copied to create projects from templates. This check box is not editable.
Analysis Group	Enter the analysis group that the system uses for mapping analysis types from the template project or activity to the new project or activity. When you copy transaction rows from one project to another, the analysis group indicates which transaction rows to copy. The system copies only those rows with an analysis type that is in the selected analysis group. The Template Copy analysis group (COPY) selects actual cost rows (with an analysis type of ACT) and maps them to total cost budget rows (with an analysis type of BUD). Thus, the system selects ACT rows from the template project and copies them to the new project as BUD rows. The COPY analysis group is delivered as system data; however, you can use any analysis group. See Analysis Groups Page.

Activity Records

This table lists the activity record and temporary records that are necessary for performing the copy process:

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Activity Record (Table)	Temporary Record (Table)	Used for Project Copy, Project Templating, or Both
PC_AM_RULE_ACT	PC_CPY_ACAM_TAO	Both
PC_BUD_ACTIVITY	PC_CPY_BDAC_TAO	Copy
PC_BUD_ALERT	PC_CPY_BDAL_TAO	Both
PC_BUD_DETAIL	PC_CPY_BDTL_TAO	Both
PC_BUD_ITEM	PC_CPY_BDIT_TAO	Both
PC_DELIVERABLES	PC_CPY_DELV_TAO	Both
PC_PRICE_R_PLAN	PC_CPY_PRCP_TAO	Both
PC_PRICE_RATES	PC_CPY_ARAT_TAO	Both
PGM_ACT_DEP	PGM_CPY_ATD_TAO	Both
PROJ_ACT_DESCR	PC_CPY_ADES_TAO	Copy
PROJ_ACT_LOC	PC_CPY_ALOC_TAO	Both
PROJ_ACT_STATUS	PC_CPY_ASTA_TAO	Both
PROJ_ACT_TEAM	PC_CPY_ACTM_TAO	Both
PROJ_ACTIVITY	PC_CPY_ACTY_TAO	Both
PROJ_QUALITY	PC_CPY_QUAL_TAO	Both
PSA_ORGPRJ_ACT	PC_CPY_OGAC_TAO	Copy

Transaction Records

Field or Control	Description
Transaction Record (Table) and **Temporary Record (Table)**	The only transaction record that is necessary for performing the copy process is PROJ_RESOURCE. The corresponding temporary record is PROJ_RES_TMP. The system copies the selected records and field values only if you select the **Allow Transactions Copy** option on the Copy Template 1 page.

Delete Utility Tables Page

Use the Delete Utility Tables page (PC_DEL_PROJ_REC_PG) to define the parameters for deleting projects, activities, and transactions for a specified business unit.

The Project Delete utility provides an effective means of removing projects, activities, and transactions from the database. Before you can use the utility, you must set up utility tables for each business unit that is on the Delete Utility Tables page, which is accessible to managers or power users who have permission to implement the Project Delete utility.

Navigation:

Setup Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Options**, and then **Delete Utility Tables**

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

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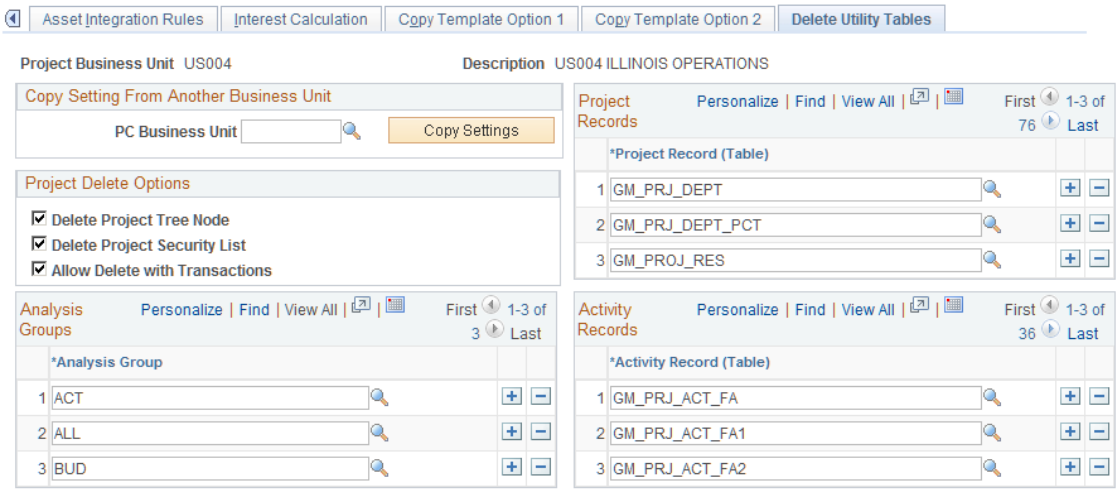

Use this page to set up the system to allow the deletion of:

- All or selected transactions based on the project, activity, and analysis group.
- All or selected activities based on the project.
- A project and all associated project data.
- A project node from a specified project tree.

The Project Delete utility does not purge project-related data from feeder systems or modules that interface with Project Costing.

> **Warning**
>
> Give thoughtful consideration to the process of setting up the Project Delete utility. Project deletions are permanent and irreversible.

Field or Control	Description
Project Business Unit	To copy the settings of the **Analysis Groups, Project Records,** and **Activity Records** group boxes from another project business unit to the business unit that is listed at the top of the page, enter the business unit that is to be copied and click **Copy Settings.**
Delete Project Tree Node	Select to delete the corresponding project node from the business unit's project tree structure when the project is deleted.
Delete Project Security List	Select to delete the corresponding rows from the Project Security table (SEC_PROJLST_CLS). When you delete a project, the system also removes project team members from the Project Security table who are associated with the project.

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Field or Control	Description
Allow Delete with Transactions	Select to delete projects and activities even if transaction rows exist. When you attempt to delete a project or activity, a warning appears indicating that transaction rows are present and are deleted along with the project or activity. deselect the **Allow Delete with Transactions** option to restrict users from deleting a project or activity if a transaction row is present.
Analysis Group	Enter the type of transactions, by analysis group, that you can delete at the transaction level. At this level, project and activity tables remain unchanged.

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Field or Control	Description
Project Records	Enter the project records from which data is purged when you delete a project and its activities at the project level. To prevent data fragmentation, include these records in the **Project Records** group box: • GM_PRJ_DEPT • GM_PRJ_DEPT_PCT • GM_PROJ_RES • GM_PROJ_RES_DT • PC_AM_ASSET • PC_AM_ASSET_SUM • PC_AM_RULE_PRJ • PC_BUD_PLAN • PC_BUD_PLAN_LNG • PC_BUD_PLN_HIST • PC_BUDPLHST_LNG • PC_CHC_INFO • PC_GNT_PROJ • PC_IM_ATTCH_LNG • PC_IM_ATTCH_TBL • PC_IM_HIST_LNG • PC_IM_HIST_TBL • PC_IM_ISSUE_LNG • PC_IM_ISSUE_TBL • PC_IM_NOTE_LNG • PC_IM_NOTE_TBL • PC_IM_RSLTN_LNG • PC_IM_RSLTN_TBL • PC_PIC_ADD_LNG • PC_PIC_ADD_TBL • PC_PIC_NOTE_LNG • PC_PIC_NOTE_TBL • PC_PIC_STUS_TBL • PC_PROJHEALTH • PC_SR_DATES • PC_SR_FRQS • PC_TEAM_IP_SCHD • PC_TEAM_IPSC_LG • PC_TEAM_SC_LANG • PGM_ACTION_PLAN • PGM_BUDANALFACT • PGM_BUD_AUDIT • PGM_BUD_AUDT_LG • PGM_BUD_DETAIL • PGM_BUD_DOC • PGM_BUD_DOC_LG • PGM_BUD_PERIOD • PGM_BUD_PLAN • PGM_BUD_PLAN_LG • PGM_CHC_BUD_LG • PGM_CHC_HDR_LG • PGM_CHC_PRD_LG

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Field or Control	Description
	• PGM_CHC_REQ_BUD • PGM_CHC_REQ_HDR • PGM_CHC_REQ_PRD • PGM_CHC_REQ_RES • PGM_CHC_RES_LG • PGM_PRJ_RISK_LG • PGM_PROJ_RISK • PGM_RISK_ATTACH • PGM_RISK_ATT_LG • PGM_RISK_NOTES • PGM_RSK_NOTE_LG • PGM_RISK_TRIGGR • PGM_RSK_TRIG_LG • PROJECT • PROJECT_DESCR • PROJECT_LANG • PROJECT_MGR • PROJECT_SCHED • PROJECT_STATUS • PROJECT_TEAM • PROJ_APPROVAL • PROJ_DOCUMENT • PROJ_EV_APPROVE • PROJ_FUNDING • PROJ_JUSTIFY • PROJ_LOCATION • PROJ_TEAM_LANG • PROJ_TEAM_SCHED • PSA_ORGPRJ_DEFN You can copy project record settings from the sample database that this PeopleSoft application delivers.

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Field or Control	Description
Activity Records	Enter the activity records from which rows are purged when you delete data at the activity level. To prevent data fragmentation, include these records in the **Activity Records** group box: • GM_PRJ_ACT_FA • GM_PRJ_ACT_FA1 • GM_PRJ_ACT_FA2 • GM_PRJ_ACT_FA3 • PC_AM_PROJ_DEFN • PC_AM_RULE_ACT • PC_BUD_ACTIVITY • PC_BUD_ALERT • PC_BUD_ALRT_LNG • PC_BUD_DETAIL • PC_BUD_DTL_HIST • PC_BUD_ITEM • PC_BUD_SUMMARY • PC_PRICE_R_PLAN • PC_DELIVERABLES • PC_DELIVER_LANG • PC_DELV_DOC • PC_DELV_DOC_LNG • PC_PRICE_RATES • PC_RES_FUND • PC_SR_SUM_DTL • PC_SR_SUMDTL_AF • PGM_ACT_DEP • PGM_CHC_ACT_LG • PGM_CHC_ARL_LG • PGM_CHC_REQ_ACT • PGM_CHC_REQ_ARL • PGM_CHC_REQ_ETC • PROJ_ACTIVITY • PROJ_ACTIVTY_LG • PROJ_ACT_DESCR • PROJ_ACT_LOC • PROJ_ACT_STATUS • PROJ_ACT_TEAM • PROJ_QUALITY • PSA_ORGPRJ_ACT Activity record settings can be copied from the sample database that this PeopleSoft application delivers.

Setting Up Other Project Business Unit Options

Additional pages in the Project Costing Options component (PC_BUS_UNIT_OPT) are discussed in business process topics for this subject. This table lists the additional component pages and provides a link to the discussion:

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Project Options Component Page	Location of Page Discussion
Microsoft Project	See Microsoft Project Page.
Budget Alerts	See Project Costing Options - Budget Alerts (business unit) Page.
Asset Integration Rules	See Project Costing Options - Asset Integration Rules Page. See Project Costing Options - Asset Integration Rules Page.
Interest Calculation	See Interest Calculation Page.

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4

Setting Up PeopleSoft Project Costing Control Data

Understanding Project ChartFields

ChartFields store the chart of accounts and provide the basic structure to segregate and categorize transactional and budget data.

See Application Fundamentals: Understanding PeopleSoft ChartFields.

The PeopleSoft system provides these six project ChartFields:

- Project Business Unit (BUSINESS_UNIT_PC)
- Project (PROJECT_ID)
- Activity (ACTIVITY_ID)
- (Optional) Source Type (RESOURCE_TYPE)
- (Optional) Category (RESOURCE_CATEGORY)
- (Optional) Subcategory (RESOURCE_SUB_CAT)

Use the Standard ChartField Configuration page (STANDARD_CF_TMPLT) to modify these project ChartField attributes:

- Field display order.

  You can change the placement of the group of project ChartFields when they appear in a grid with all other general ledger ChartFields. All project ChartFields move together in a block when you change the order of the Project ChartField.

- Status (active or inactive).
  - The Project ChartField must remain active if you use PeopleSoft Expenses, Resource Management, or Project Costing.
  - Source Type, Category, and Subcategory ChartFields must remain active if you specify on the Project Costing Options page that these are required fields for the project business unit.
  - The Source Type ChartField must remain active if you specify on the Project Costing Definition page that Category field values are related to the Source Type.
  - The Category ChartField must remain active if you specify on the Project Costing Definition page that Subcategory field values are related to the Category.
- Default field label.
- Field display length.

The Project Business Unit, Activity, Source Type, Category, and Subcategory ChartFields do not appear for selection in the **IntraUnit Related ChartField** drop-down list on the Standard ChartField Configuration page.

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> **Note**
>
> The Analysis Type field (ANALYSIS_TYPE) is not a project ChartField; therefore, it does not appear in the Standard ChartField Configuration page. However, the Journal Lines page (JOURNAL_LN_FS) includes the Analysis Type field with the project ChartFields in the Journal Line Data grid. If you reorder the project ChartFields on the Standard ChartField Configuration page, the Analysis Type field retains its position between the Activity and Source Type ChartFields on the Journal Lines page.

Source Types

Project Costing uses transactions to track, analyze, and report on actual and planned project costs. You assign source types to individual transactions to identify the transaction's purpose.

Source types can be as general or as specific as needed. For example, you can use a Labor source type to track total project labor costs, or use overtime labor and standard labor source types to track overtime and standard labor separately.

PeopleSoft delivers the following source types as default; however, if you do not need any of the functionality provided with the source types, then they can be modified or removed.

Source Type	Description
AFUDC	AFUDC Interest
DIRCT	Direct Costs
LABOR	Labor
MATER	Materials
OVER	Overhead

Categories and Subcategories

Categories and subcategories further define source types. You can combine categories and subcategories in source groups for reporting and analysis. Although defining categories and subcategories is optional, using them provides greater flexibility and granularity for tracking and analyzing costs.

For example, you can divide a labor source type into different categories of labor, such as architect labor, carpenter labor, and plumber labor, and use subcategories for regular hours and overtime hours. By using these categories and subcategories, you can track items such as total labor costs for a project, total overtime hours, architect overtime hours, and carpenter standard hours.

Relating Source Types, Categories, and Subcategories

Source types, categories, and subcategories provide flexibility for defining transactions. You can define relationships between these fields to control data-entry options for specific fields, which reduces the possibility of error.

The relationships can be one-to-one or one-to-many. If you relate source types to specific categories, and assign a source type to a transaction, you can assign a category only if it is related to the source type. For example, a transaction with a labor source type can only be

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entered in a category that is related to labor by its definition. The same is true for relationships between categories and subcategories.

To enable relationships between source types, categories, and subcategories, select *Related* as the **Category Edit Option** and **SubCategory Edit Option** on the Project Costing Definition page (BUS_UNIT_TBL_PC).

See Creating Project Business Units.

Defining relationships between source types, categories, and subcategories is optional. If you do not establish relationships, the system does not limit the categories and subcategories that are available for selection.

Understanding General Control Data

By using control data, you can group Project Costing elements to facilitate system processing, increase system performance, and aid in analyzing and reporting project data. This topic provides an overview of three kinds of general control data:

- Asset profiles
- Transaction codes
- Transaction types

Asset Profiles

Asset profiles are templates that contain standard depreciation criteria for an asset type and its corresponding asset books. Profiles help reduce data entry and ensure consistency and accuracy when you add assets. You can use profile data as default values, and you can override any field that is in the asset profile when you enter assets into the system. You set up asset profiles in PeopleSoft Asset Management if you use that application. If you don't use PeopleSoft Asset Management, you must set up asset profiles in Project Costing before you can summarize transactions by profile or by asset.

You must set up at least one asset profile before any assets can be added to the system. Set up asset profiles to match most, if not all, of the major asset categories you track on the books. Asset profiles can range from standard categories, such as land or furniture and fixtures, to more detailed categories, such as computers, phones, and fax machines.

Each asset profile has a unique profile ID that the system uses to group profiles by type. For example, you can define automobile profiles as autos, autos-luxury, and autos-leased.

Related Topics

- Understanding Asset Capitalization Processes
  PeopleSoft Project Costing manages the transaction costs associated with assets from inception to cost value adjustment to retirement. Full lifecycle asset management provides detailed cost control, from defining the physical asset to placing it in service, maintaining it, and retiring it. You can create assets from project transactions by using either express capitalization or manual capitalization.
- Asset Profile Page
  Use the Asset Profile page (PROFILE_DEFN_PC) to create asset profiles in PeopleSoft Project Costing if you do not use PeopleSoft Asset Management.

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Transaction Codes

You can use transaction codes to deal with exceptions and specific cases without creating a transaction type for each case. Add transaction codes to resource transactions as an additional key, and define accounting rules for transactions containing those transaction codes. The accounting rules for those resource transactions can then use the same transaction types but specify different accounts. For example, transaction codes can identify costs specifically for month-end or year-end processing.

Using transaction codes is optional.

Transaction Types

Accounting rules determine how project transactions are translated into entries that are sent to the general ledger. Transaction types define generic transactions that are used to define an accounting rule.

Transaction rows that belong to the transaction type are assigned to a general ledger account based on an accounting rule. By defining transaction types in a separate table, you save time and reduce errors when you define accounting rules.

Standard transactions involve moving money from one account to another within the same general ledger business unit. Intercompany transactions involve moving money from an account in one general ledger business unit to an account in another general ledger business unit. Additional transaction rows are required for intercompany transactions.

Understanding Project-Related Control Data

Project-related control data consists of required and optional information that you use primarily to create new projects. This topic provides overviews of:

- Integration templates
- Project types
- Project and processing statuses
- Project type status paths
- Phase types
- Project events

Integration Templates

Project Costing uses integration templates to share projects across multiple business units in PeopleSoft Asset Management, Purchasing, and General Ledger. For example, if you create an integration template that points to multiple general ledger business units, you can share a project across those specific business units. Integration templates also establish business units that are assigned to transactions by default.

You must assign an integration template to each new project. For example, if a company has an aerospace division and a utilities division, aerospace projects may use one general ledger business unit and utilities projects may use another general ledger business unit. Therefore, you will set up two integration templates—one to define the business unit integration for aerospace projects and one to define the business unit integration for utilities projects.

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Each project integration template contains a specific set of general ledger business units. Integration templates provide the flexibility to define the integration between project business units and general ledger business units that best fit the organization's needs. You can set up the project and general ledger integration so that:

- One project business unit can post to many general ledger business units.
- Many project business units can post to a single general ledger business unit.
- Each project business unit can post to a different general ledger business unit.

The system also uses integration templates to control access to general ledger business units. You can post transactions for a project only to a general ledger business unit that is specified in the integration template that is assigned to the project. The same control applies to purchasing business units. You can create requisitions in PeopleSoft Purchasing for a project only if the purchasing business unit is defined on the integration template for the project.

Project Types

The system uses project types to categorize projects for reporting and analysis. Additionally, you can assign a default rate set or rate plan to a project type for specific business units. When you create a new project and specify the project type, the system automatically attaches the default rate set or rate plan that is associated with the project type and business unit combination.

Using project types is optional.

Related Topics

- Project Definitions - Rates Page
  Use the Project Definitions - Rates page (PROJECT_SERVICES) to track billing, costing, and burdening project rates and view contracts integration information that is associated with a project.

Project and Processing Statuses

Project Costing uses two statuses to convey where a project is in its life cycle—project status and processing status:

- Status field (PROJECT_STATUS)

  This required, user-defined field identifies the conditions that you want to track for projects and activities. The status also defines project events, such as conditional changes that require approval.

  You can define status types or use the system-delivered status types.

- Processing Status field (PROCESSING_STATUS)

  This system-defined field is used by the system to restrict incoming transactions. For example, you can charge cost transactions from feeder systems to projects with an *active* processing status but not to projects with a *pending* processing status.

  Valid processing status values are *Pending, Active, Inactive,* and *Template.* You map the user-defined status types to any system-defined processing status except the *Template* processing status. When you update a project status, the system automatically updates the processing status based on this mapping. You cannot change the processing status of a project directly.

You can map these system-defined processing status types to project status types:

- Active

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- Pending
- Inactive

This table lists the status types that Project Costing delivers as sample data and their mappings to processing status types:

Status Type	Corresponding Processing Status Type	Status Effective Date
A (Approved)	Active	01/01/1900
B (Budgeted)	Pending	01/01/1900
C (Closed)	Inactive	01/01/1900
F (Forecasted)	Pending	01/01/1900
H (Hold)	Pending	01/01/1900
I (In Service)	Active	01/01/1900
O (Open)	Active	01/01/1900
P (Proposed)	Pending	01/01/1900
Z (Frozen)	Inactive	01/01/1900

Every project status must map to a processing status. You can modify project status types and the delivered mappings, but you must not delete or modify the delivered processing statuses.

Status Effective Dates

The status of a project is effective-dated. When you assign a new project status and effective date, the Project - Processing Status Link Application Engine program (PC_STAT_LINK) assigns the corresponding processing status based on the effective-dated mapping that you defined for the project status type.

When you create a new project manually in Project Costing, if the project start date equals or precedes the current date, the system assigns the project status effective date based on the project start date. If the project start date is in the future, the system assigns the project status effective date based on the current date.

You cannot change the project start date to an earlier date if there is no valid project status assigned to the project based on the effective date. In this situation, adjust the project status effective date before you change the project start date.

You can modify the project status on the Project Definitions - General Information page until you save a new project. After that, you must enter a new effective-dated row on the Project Definitions - Status page to change the project status.

Default Project Statuses for Integration with Other Applications

Use the Project Status Defaults page to specify default project statuses for each system-defined processing status for projects that are programmatically created by these applications:

- PeopleSoft Resource Management.
- PeopleSoft Contracts.
- PeopleSoft Grants.
- PeopleSoft Proposal Management.
- PeopleSoft Project Portfolio Management (for projects that are created by project requests in a costing or declined status).

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- PeopleSoft Program Management (for projects that are created by project requests in a costing or declined status).

Also use the Project Status Defaults page to specify both default project and processing statuses for projects that are programmatically created by project requests in an approved status in PeopleSoft Project Portfolio Management or PeopleSoft Program Management. Otherwise, the project request approval process fails.

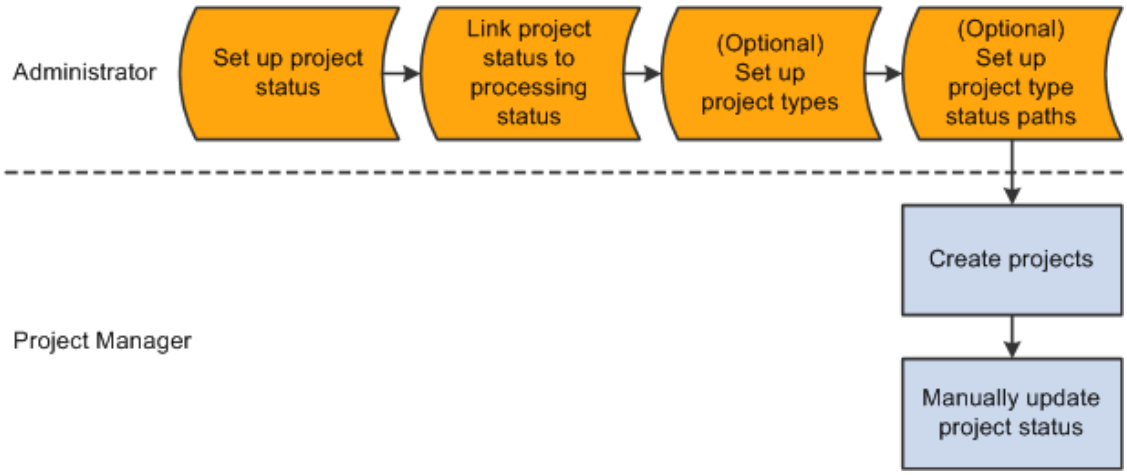
As an example of using default project statuses for integration with other applications, assume that you create a project to model costs for a proposal in PeopleSoft Proposal Management. The system assigns the pending processing status, and assigns the default project status that is set up for pending projects that are created by project requests in PeopleSoft Proposal Management.

To change the project status for a project that is created by PeopleSoft Resource Management, Grants, Proposal Management, Project Portfolio Management, or Program Management, you select a project status that is mapped to a processing status on the Project Status Defaults page.

Process Flow

This diagram shows the process flow to set up project and processing statuses and to update a project status:

The diagram illustrates that an administrator sets up project statuses, links the project status to a processing status, optionally sets up project types, and optionally sets up project type status paths. Then a project manager creates projects and manually updates the project status.



After you update the project status, the system:

1. Determines if the corresponding processing status is a valid change based on the previous processing status.

   The processing status:

   - Can change from Active to Active.
   - Can change from Active to Inactive.
   - Can change from Inactive to Inactive.
   - Can change from Inactive to Active.

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- Can change from Pending to Pending.
- Can change from Pending to Active.
- Can change from Pending to Inactive.
- Can not change from Active to Pending.
- Can not change from Inactive to Pending.

2. Determines if the project status effective date is current or future-dated.

   An Application Engine process monitors project status effective dates and updates the processing status as necessary.

3. Determines if a processing status change is valid.

   If the change is not valid, an error message appears.

4. Determines if a project type status map exists for the project type.

   If a project type status map exists, the system determines if the project status change is valid based on the project type status path for that project type.

5. Determines if a project event is defined for this project status change.

   If a project event is defined, the system triggers approval workflow.

6. Updates project status and processing status.

Project Type Status Paths

Project type status paths combine project types and project status types to control the status progression through the life cycle of a project and activity. You can define custom project status paths for each project type and business unit combination.

For example, assume that you set up a project type status path for the project type of R&D (research and development) to manage the project life cycle. The status progression for this project type is:

1. Proposed
2. Budgeted
3. Active or Closed
4. Closed

In this example, users can change an R&D project from a proposed status only to a budgeted status. In other words, you cannot approve a project until it has been budgeted. You can change an R&D project from a budgeted status to an active status if the budget is approved, or to a closed status if the budget is not approved. When the R&D project is complete, you can change the status from active to closed. This project type status path restricts users from changing a closed project to any other status. In this way, you prevent users from reopening projects that were previously closed.

Select the **Use Status Path** check box on the Project Types page to use a project type status path for a specific project type. Use the Project Type Status Path page to define status paths.

After the system determines if a project status and the corresponding processing status are valid changes, the system determines if the project type status path is valid.

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> **Note**
>
> You must coordinate the default project status for new projects with the project type status path rules that you enable for project types. For example, if the default project status for new projects is *Proposed,* the project type status path must include a valid path for projects in a *Proposed* status. You define the default project status for new projects on the Project Status Defaults page.

Phase Types

When you enter dates in a project schedule, the phase of the project that those dates represent can be useful information. For example, for a phase type of Clean Up, you can enter a begin cleanup date and an end cleanup date in the project schedule to track the time that is spent specifically on the Clean Up phase. Using phase types is optional.

Project Events

Project events are changes in the status of a project or an activity. For example, you can define a change in project status from Proposed to Approved as a project event that requires approval. A project event can be a change in project status between two consecutive status types, such as Proposed and Approved, or two nonconsecutive status types, such as Proposed and Closed. You must define project status types before you define project events. Using project events is optional.

Understanding Activity-Related Control Data

Activity-related control data consists of required and optional information that you use primarily to create new activities. This topic provides overviews of:

- Quality types
- Standard activities

Quality Types

Quality types identify the criteria on which you can rate activities for quality. For example, you can rate projects for quality based on accuracy, on-time performance, safety, or usability. Set up quality types that you can use to group and analyze activities with quality ratings that are based on the same criteria. Using quality types is optional.

Standard Activities

You can limit the number and types of activities that users can assign to projects, which facilitates reporting and analysis. Standard activities are predefined, keyed by SetID, and based on project type. You can require users to select from a list of standard activities when they assign activities to projects.

To use standard activity functionality:

- Define standard activities on the Standard Activities page.
  1. Select the **Projects** option for each activity that you want to use in Project Costing.
  2. Assign a specific project type to each activity that you want to use in Project Costing.

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- Create a project and on the Project Definitions - General Information page assign a project type that is associated with the standard activities that you want to add to the project.
- On the Project Costing Definition page for the project, select the **Standard Activities** option to enable the standard activity functionality.

Using standard activities is optional.

Related Topics

- Project Definitions - Project Costing Definition Page
  Use the Project Definitions - Project Costing Definition page (PROJECT_GEN_01) to define various project options, project currency, and analysis groups.

Understanding Transaction-Related Control Data

Transaction-related control data consists of required and optional information that you use primarily to create transactions. This topic provides overviews of:

- Analysis types
- Analysis groups
- Transaction identifiers

Analysis Types

With the exception of programs (summary projects), each project is composed of, at the most basic level, transactions. Transaction rows in the Project Transaction table (PROJ_RESOURCE) contain the quantity and amounts associated with each transaction and all of the identifying information that accompanied those costs. Analysis types are assigned to individual transactions to identify different types of transactions, such as estimated costs, budgeted amounts, actual costs, and billed costs. For example, you can create an analysis type for the calculation of total budgeted amounts of the project compared to total actual costs, to see if the project is over or under budget at any time during the project.

A single transaction can result in multiple transaction rows as it moves through the system. For example, assume that a project has 1,000 USD budgeted for project labor. The actual cost of labor is 1,500 USD, and the amount of billing for the labor is 1,700 USD. The result is three transaction rows that record the same labor transaction as it moves from stage to stage through the project, as shown in this table:

Analysis Type	Transaction Type	Amount
BUD (Budget)	LABOR	1,000.00 USD
ACT (Actual costs)	LABOR	1,500.00 USD
BIL (Billing)	LABOR	1,700.00 USD

Many of the following analysis types are necessary for Project Costing analysis groups, reports, and processes to function properly. If you choose not to implement these analysis types, you still must configure these features. You can create additional analysis types for processing and analysis purposes.

Analysis Type	Description
ACT	Actual Cost
ASP	Express Asset % Distributions

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Analysis Type	Description
BAJ	Billing Adjustment
BD1 through BD8	Total Cost Budget - Scenario 1 through Total Cost Budget - Scenario 8
BIL	Billable Amount
BLD	Billed Amount
BRT	Billing Retainage
BUD	Total Cost Budget
CAC	Cost Sharing Actuals
CAJ	Cost Share Commitment Adjust
CBA	Cost Budget Adjustments
CBU	Cost Sharing Budget
CCA	Closed Commitment Adjustments
CCO	Cost Sharing Commitment
CCR	Cost Share Commitment Reversal
CFA	Cost Sharing Finance and Administration
CGE	Cost Sharing General Ledger Expense
CLS	Asset Cost Summary
COM	Commitment including Purchase Order & Subcontractor
COR	Cost of Removal of Asset
CPY	Cost Share Payroll
CQR	Cost Share Requisition Reversal
CRQ	Cost Sharing Requisition
CRR	Cost of Removal Cost Summary
CRV	Commitment Reversals
CST	Costing (without PeopleSoft Contracts)
CV1 through CV4	Historical Cost Budget Version 1 through Historical Cost Budget Version 4
DEF	Billing Deferred Amount
DSC	Billing Discount
ESB	Proposal Management Bill Estimate
ESC	Proposal Management Cost Estimate
ETB	Bill Estimate to Complete
ETC	Cost Estimate to Complete
EXP	Expenses
FBD	Fixed Cost Billed Amount
FCC	Completion Cost
FDF	Federal Distribution
FDL	Local Distribution
FDR	Fund Distribution Reversals
FDS	State Distribution

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Analysis Type	Description
FND	Funds Distribution
FRD	Forward Pricing for Revenue
FRV	Fixed Cost Revenue Amount
FTC	Forecast Cost to Complete
GLE	GL (General Ledger) Expense
GLR	GL Revenue
GNT	Grant Reimbursement
IUP	Inter/Intra-Unit Payable
IUR	Inter/intra-Unit Receivable
MBA	Manual Billing Adjustment
MMC	Maintenance Management Costs
MRA	Manual Revenue Adjustment
NPY	No Pay Time and Labor Actual
ODL	Over Distribution Limit
OFA	Offset Revenue
OLT	Over Limit Amount
ORD	Order
PAY	Time and Labor Actual
PCA	Profile Adjustment
PCL	Profile Cost Summary
PFS	Proceeds from Sale of Asset
PMR	Proposal Management Reversal
PRV	Billing Provisional Pricing
PSD	Purchase/Sold Time Discount
PSR	Proceeds from Sale Summary
PST	Purchase/Sold Time
RAJ	Released Retainage Adjustment
RB1 through RB3	Revenue Budget 1 through Revenue Budget 3
RBD	Revenue Budget
REB	Rebate
REQ	Requisition
RET	Retirement Cost
REV	Revenue
ROL	Revenue Over Limit
RRT	Released Billing Retainage
RRV	Requisition Reversals
RV1 through RV4	Historical Revenue Budget Version 1 through Historical Revenue Budget Version 4
SFA	Sponsor Finance and Administration
SHD	Shared Discount
SHR	Shared Revenue

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Analysis Type	Description
SUT	Sales/Use Tax
TLA	Time and Labor Estimate
TLB	Time and Labor Estimate for Billing
TLC	Time and Labor Contractors
TLX	Cost from Time Traveler
TUG	Maintenance Management Tools Usage
UAJ	Prepaid Utilization Adjustment
UTL	Prepaid Utilization (Billing)
VAR	Variance
VIN	Not Recoverable Value Added Tax
WAJ	Withholding Adjustment
WFA	Waived Facilities and Administration
WRJ	Withholding Release Adjustment
WRL	Withholding Release
WTH	Withholding
WTO	Write-off
WWO	Withholding Write-off

Project Costing delivers cost sharing analysis types that are used exclusively by PeopleSoft Grants. If a transaction line for a PeopleSoft Grants project meets the criteria of cost sharing that is defined at the Grants business unit level, the system assigns the cost sharing analysis type to the transaction.

Analysis Groups

You use analysis groups to:

- Analyze projects
- Map analysis types
- Enhance system performance

Many analysis groups are necessary for Project Costing project analysis functions and mass changes to execute properly. If you choose not to use the analysis groups that are delivered with Project Costing, you still have to configure the analysis groups or create new ones to use with these functions. This table describes the analysis groups:

Analysis Group	Description
ACT	Actual Cost
ADJST	PC (Project Costing) Transaction Adjustment
ALL	All Analysis Types
AMCOR	Project Costing to Asset Management Cost of Removal
AMPFS	Project Costing to Asset Management Proceeds from Sale
AR	Receivables

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Analysis Group	Description
BFEE	Billing Fee
BI	Billing
BLD	Billed Transactions - Worksheet to Project Transaction table
BUD	Budgets
CBU	Cost Sharing Budget
CLOSE	Project Costing to Asset Management Asset Summary
COM	Commitments
COPY	Template Copy
COSTS	Estimated and Actual Costs
CRQ	Cost Sharing Requisition
CSCOM	Cost Share Commitment Balance
CSTSH	Cost Sharing Analysis Group
EAC	Estimate at Completion
FNA	Facilities and Administration
FOR2C	Forecast Cost at Completion
FREV	Forecast Revenue
GBUD	Grants Budgets
GL	General Ledger Analysis Types
GMACT	Grant Reporting Actual Expense
HBPV1 through HBPV4	Historical Budget Version 1 through Historical Budget Version 4
INT	Interest Calculation
LABOR	Labor Cost and Time
MMCST	Maintenance Management Costs
OPENC	Open Commitment Balance
PCADJ	Project Costing to Asset Management Profile Adjustment
PCBUD	All Projects Budget Types
PMBIL	Mgr Trans Review (Manager Transaction Review) - Billing
PMCST	Mgr Trans Review - Cost
PMEXP	Proposal Management - Expense
PMPOP	Mgr Trans Review – Period of Performance
PMREV	Mgr Trans Review - Revenue
PMSHR	Mgr Trans Review - Sharing
PMTIM	Proposal Management - Time
POADJ	Purchasing Adjustments
PRECL	Project Costing to Asset Management Profile Summary
PSBLD	Billing to Project Costing

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Analysis Group	Description
PSCST	Accounting Costs
PSDEF	Funds Distribution Defaults
PSDST	Funds Distribution
PSECC	Estimated Costs to Completion
PSITD	Inception to Date Costs
PSLMT	Limit Processing - Billing
PSREV	System Revenue
PSROL	Limit Processing - Revenue
PSRV2	GC (Government Contracting) System Revenue
PSTDR	Sharing
PSUAB	Revenue on Unapproved Billing. Analysis types included in this group and the PSREV group are eligible for revenue recognition prior to being reviewed or approved for billing.
PSVP	If using variance pricing, use this analysis group to map a converted analysis type to its original analysis type during the Variance Pricing process (PC_VAR_PRICE). As a transaction progresses through the billing process, the analysis type is changed. For example, a BIL analysis type is changed to BLD when the transaction is invoiced in PeopleSoft Billing. This can cause issues when trying to net new pricing rows with historic rows. Therefore, in the example, this analysis group assists the Variance Pricing process to map the BLD transaction row to the BIL transaction row. You can modify this analysis group.
PSVPX	If using variance pricing, use this analysis group to prevent analysis types from being included in historical rows. For example, a sales tax row that is generated in Billing may be considered to be outside the contractual rate. This transaction carries the original resource from ID, and would normally have been included in the netting process and the historical rows. You can modify this analysis group.
PSWKS	Billing Worksheet Grouping
RBUD	Revenue Budget Group
REQ	Requisitions
RFEE	Revenue Fee
SPACT	Grants Sponsor Actual Costs
SPENC	Grants Sponsor Commitments
UNBLD	Unbilled Transactions
VARY	Variance

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Using Analysis Groups to Analyze Project Costs

You use analysis groups to define relationships among analysis types to analyze project costs using Project Costing pages, queries, or reports.

Creating an analysis group to analyze projects follows this process:

1. Group the analysis types to include in the project analysis.
2. Apply the appropriate multiplier to each analysis type to create a relationship.

A multiplier determines how amounts and quantities for a specific analysis type are factored into the analysis. The multiplier is applied to total quantities and amounts in all transactions identified by a specific analysis type. For example, to add amounts to the analysis, enter *1.* To subtract costs from the analysis, enter *−1.* To add half of the amounts to the analysis, enter *0.5.*

The easiest way to create analysis groups for analyzing projects is to start with an equation. An equation makes it easier to determine what multiplier to assign to an analysis type. For instance, to create an analysis group to determine whether or not a project is over budget, you might start with this equation: Budgets − Actuals = Budget-to-Cost Variance.

You assign a multiplier of *−1* to the Actual Cost analysis type and a multiplier of *1* to the Total Cost Budget analysis type. When using this analysis group for online analysis or reporting, all actual costs from the analyzed project are subtracted from budgeted costs. If the result is a negative number, the project is over budget. To set up the analysis group so that a positive number means that the project is over budget, reverse the multipliers so that budgeted amounts are subtracted from actual costs.

You can apply multipliers to quantities for each analysis type included in an analysis group. When you create analysis groups to analyze project costs, multipliers will probably be the same for both the amount and the quantity.

Using Analysis Groups to Map Analysis Types

New projects or activities can be created from copies of existing projects and activities. You can specify an analysis group to map analysis types from the existing project or activity to the new project or activity. For example, when you create a new project from an existing project, you can create an analysis group that maps actual (ACT) transactions from the existing project to the newly created project as budget (BUD) transactions. By using analysis groups, you can also manipulate mapped amounts. For example, you can enter a multiplier of *2* to double the budgeted quantities and amounts in the new project.

Using Analysis Groups to Enhance System Performance

On some PeopleSoft Project Costing pages, analysis groups limit the number of resource transactions that appear on a page at one time. For example, when there are tens of thousands of transactions per project in the system, performance is greatly reduced if you try to access all of those transactions every time that you open a page. By using analysis groups, you can limit the number of transactions that appear on a page to transactions of specified analysis types.

To do this, create an analysis group that identifies a group of analysis types. When an analysis group is entered as part of the selection criteria, only the resource transactions that contain the analysis types specified in that analysis group are available for use on the page.

Related Topics

- Creating and Defining Projects

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Source Groups

PeopleSoft delivers the following source types as default; however, if you do not need any of the functionality provided with the source types, then they can be modified or removed.

- ITEMS (Inventory Items)
- LABOR (Total Labor)
- MATER (Total Material)

The high-level steps to establish source groups are:

1. Define source types.
2. Define resource categories.
3. Define resource subcategories.
4. Combine multiple source types for award analysis and billing.
5. Add descriptions to resource groups.

Transaction Identifiers

Tiered pricing enables you to adjust the rate applied to cost transactions during the Pricing Application Engine process (PC_PRICING) based on quantities that accumulate against a contract line. This type of pricing applies to rate-based, contract-line processing only. Implementing tiered pricing requires that you create transaction identifiers, which are similar in concept to using analysis groups. Transaction identifiers provide users with the flexibility to identify and group project ChartField values and eliminate the need to identify the ChartField values each time they define tiered pricing for a new contract line.

Transaction limits, another feature that is available if you use PeopleSoft Contracts, also requires the use of transaction identifiers. Transaction identifiers enable you to apply specific limits to transactions with Project Costing ChartField values that match the contents of the transaction identifier for a specific contract line.

> **Note**
>
> You must use PeopleSoft Contracts to implement the Tiered Pricing and Transaction Limits features.

See Transaction Identifiers Page.

Setting Up Project ChartFields

To set up project ChartFields, use these components:

- Source Types (PROJ_RES_TYPE)
- Categories (PROJ_CATG_DEFN)
- Subcategories (PROJ_SUBCAT_DEFN)
- Relate Source Type/Category (PROJ_TYPE_CAT)
- Relate Category/Subcategory (PROJ_CAT_SUB)

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Use these component interfaces to load data into the tables for this component:

- PC_RES_TYPE_INTFC
- PC_CATG_DEFN_INTFC
- PC_SUBCAT_DEFN_INTFC

Pages Used to Set Up Project ChartFields

Page Name	Definition Name	Usage
Source Types Page	PROJ_RES_DEFN	Create and modify source types.
Categories Page	PROJ_CATG_DEFN	Create and modify categories.
Subcategories Page	PROJ_SUBCAT_DEFN	Create and modify subcategories.
Relate Source Type/Category Page	PROJ_TYPE_CAT	Relate source types to categories.
Relate Category/Subcategory Page	PROJ_CAT_SUB	Relate categories to subcategories.

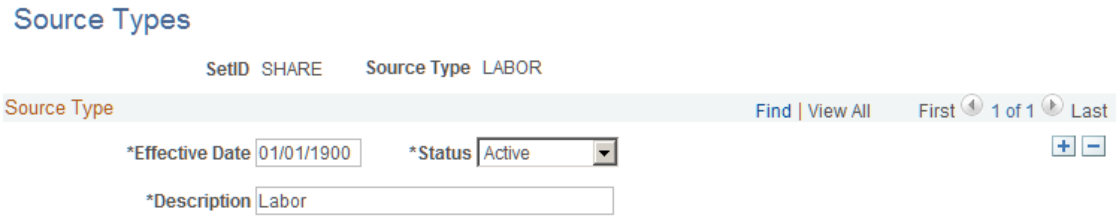
Source Types Page

Use the Source Types page (PROJ_RES_DEFN) to associate source types to categories.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **Setup PC Source Types**

This example illustrates the fields and controls on the Source Types page.



Field or Control	Description
Category	Enter a category to associate with the displayed source type. Available values are based on the Project Type Category Prompt table (PROJ_TYPE_CAT). Add more rows to add additional categories.
Relationship	Enter a description of the relationship for each type and category combination.

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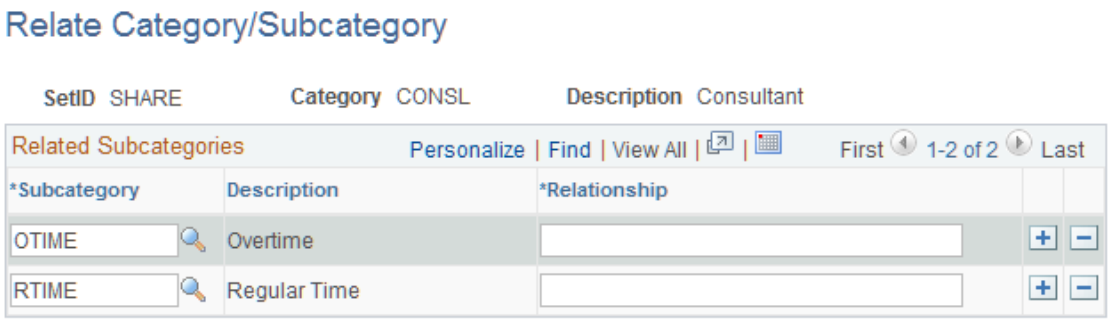
Relate Category/Subcategory Page

Use the Relate Category/Subcategory page (PROJ_CAT_SUB) to relate categories to subcategories.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **Relate Category/Subcategory**, and then **Relate Category/Subcategory**

This example illustrates the fields and controls on the Relate Category/Subcategory page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Subcategory	Enter a subcategory to associate with the displayed category. Available values are based on the Project Subcategory Prompt table (PROJ_CAT_SUB). Add more rows to add additional subcategories.
Relationship	Enter a description for the new category and subcategory relationship.

Setting Up General Control Data

To set up general control data, use these components:

- Asset Profile (PROFILE_PC).
- Budget Items (PC_BUD_ITEMS).
- Interest Types (INTEREST_TYPE).
- Transaction Codes (PROJ_TRANS_CODE)
- Transaction Types (PC_TRANS_TYPE)
- Project and Activity User Field Labels (PC_USER_FLD_LBL)
- Contracts Workbench Template (CA_CONS_TPL)

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Pages Used to Set Up General Control Data

Page Name	Definition Name	Usage
Asset Profile Page	PROFILE_DEFN_PC	Create asset profiles in PeopleSoft Project Costing if you do not use PeopleSoft Asset Management.
Budget Items Page	PC_BUD_ITEMS	Create and modify budget items.
Interest Types Page	PROJ_INTEREST_DEFN	Create interest types if you calculate more than one type of interest for a period, such as debt interest and equity interest.
Transaction Codes Page	PROJ_TRANS_CODE	Create and modify transaction codes.
Transaction Types Page	PROJ_TRANS_TYPE	Create and modify transaction types.
Project and Activity User Field Labels Page	PC_USER_FLD_LBL	Create labels for the Project User fields and Activity User fields.
PeopleSoft Contracts: Contracts Workbench Template Page	CA_CONS_TPL	Use this page to define Contracts Workbench Templates for PeopleSoft Contracts, Grants, and Project Costing.

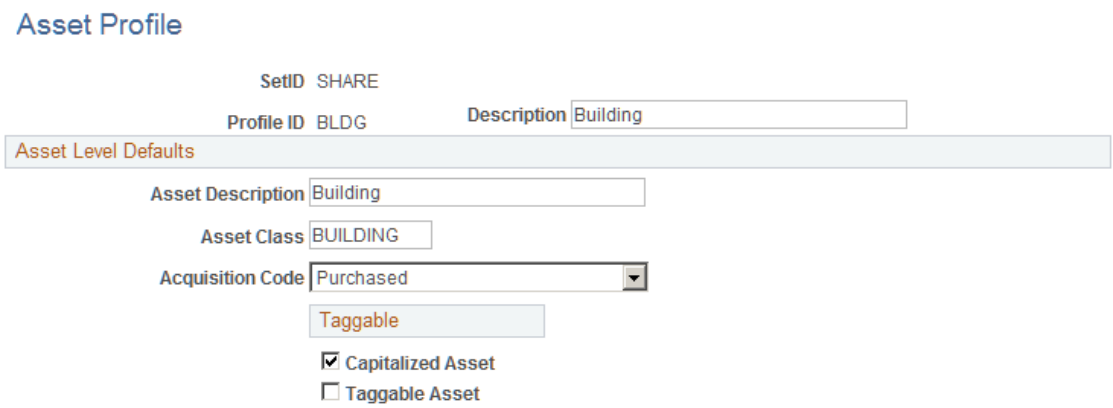
Asset Profile Page

Use the Asset Profile page (PROFILE_DEFN_PC) to create asset profiles in PeopleSoft Project Costing if you do not use PeopleSoft Asset Management.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Asset Profile**

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



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> **Note**
>
> Project Costing can create capitalized rows and distribute them without integrating with PeopleSoft Asset Management. You can still use the PeopleSoft Asset Management interface tables (INTFC_FIN and INTFC_PHY_A); however, a custom process is required to extract data from these tables.

Asset Level Defaults

Field or Control	Description
Asset Class	Enter the type of assets that this profile covers to classify assets for reporting purposes.
Acquisition Code	Select the code that identifies how the asset is acquired. Available values are based on the translate values in the Acquisition Code field (ACQUISITION_CD) properties.

Taggable

Field or Control	Description
Capitalized Asset	Select to indicate that the profile is used for assets that are associated with cost and depreciation. Most assets that are in an asset management system are capitalized assets.
Taggable Asset	Select to indicate that the asset can be assigned a numbered tag for tracking purposes. Although most physical assets can be tagged, some assets, such as buildings or leasehold improvements, are not tagged.

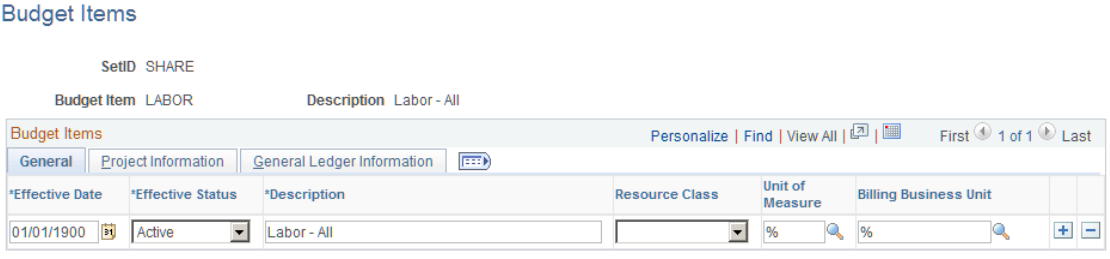
Budget Items Page

Use the Budget Items page (PC_BUD_ITEMS) to create and modify budget items.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Budget Items**

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



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Budget Items - General

Field or Control	Description
Effective Date	Enter the date that the budget item takes effect.
Effective Status	Enter the status of the budget item. Values are *Active* and *Inactive*. Inactive budget items do not appear in the list of available budget items when you create budget detail rows. Changing a budget item from *Active* to *Inactive* does not affect existing transactions that contain the budget item.
Description	Enter a unique description of the budget item.
Resource Class	Enter a resource class to associate with the budget item. Available values are: *Asset* *Labor* *Material* *Other* For budget items with a resource class of *Labor* or a blank resource class, the Project Costing system can perform advanced calculations of budget line items based on a project role, employee bill rate, or job code. If you use PeopleSoft Program Management, this is the same functionality that is available by using the **Calculate** button on the Program Budget Detail page. If you use PeopleSoft Program Management and enter a resource on the Resources by Activity page, you must choose a resource class for the resource. Then, when you choose a budget item on the **Cost** tab of the Resources by Activity page, the system validates that the selected budget item belongs to the selected resource class for the resource. The selection of a resource class for a budget item is optional.
Unit of Measure	Enter a unit of measure to be used on budget rows, or enter % to include all values. Project Costing budgeting reports convert transactions to the unit of measure defined on the budget item. Only transactions that match this unit of measure are included in the actual calculations. Available values are defined on the Units of Measure page (UNITS_OF_MEASURE). See Application Fundamentals: Units of Measure Page.
Billing Business Unit	Enter a business unit if you want to segregate budget amounts by billing business units.

The system uses a percent symbol (%) as a wildcard on the Budget Items page. This symbol indicates that the fields with populated values are used in the budget details when that budget item is selected, and the fields that contain wildcards are blank in the budget details.

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> **Note**
>
> To create a new budget item, at a minimum you must enter the **Budget Item, Effective Date, Effective Status, Description,** and a value other than the percent symbol in at least one other field, excluding the **Resource Class** and **Project Role** fields. For example, if you enter the required fields, and a resource class and project role, you must still enter a value other than the percent symbol for any other field.

Project Information and General Ledger Information

Enter default values for the fields in the **Project Information** tab to define project transaction level groupings, and in the **General Ledger Information** tab to break down the budget amounts to the ChartField level. ChartField values that you enter here are used to establish default values for budget rows entered in the Budget Detail table (PC_BUD_DETAIL). These ChartField values are also used to identify and group transactions when reviewing costs or revenue charges against a budget.

The primary general ledger business on the integration template of the associated project appears as the default value on detail budget rows.

Interest Types Page

Use the Interest Types page (PROJ_INTEREST_DEFN) to create interest types if you calculate more than one type of interest for a period, such as debt interest and equity interest.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Interest Types**

Use this page to set up interest types, which identify the type of interest that the system calculates for projects.

Interest types are required only if you want to calculate more than one type of interest for a period.

See Understanding Interest Calculations, Establishing Period Calculation Factors, and Setting Up and Processing Interest Calculations.

Transaction Types Page

Use the Transaction Types page (PROJ_TRANS_TYPE) to create and modify transaction types.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Transaction Types**

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

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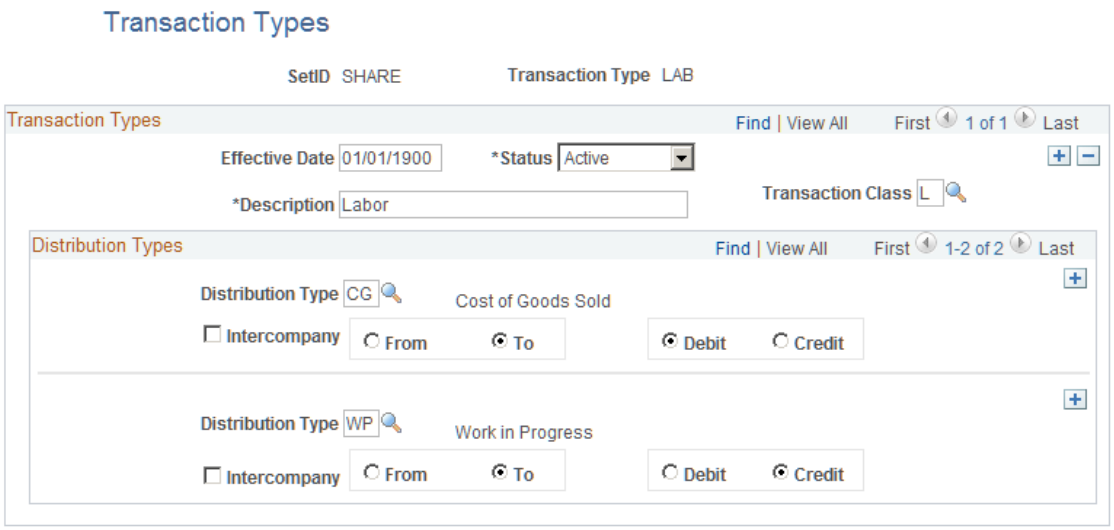

Create as many transaction rows as necessary for each transaction type. A single transaction type may contain transaction rows for both standard transactions and intercompany transactions.

Field or Control	Description
Transaction Class	Enter the transaction class that groups transaction types into categories. Available values are based on the translate values in the Transaction Class field (TRANS_CLASS) properties.

The **Distribution Type** group box functionality is used in earlier releases of Project Costing.

Project and Activity User Field Labels Page

Use the Project and Activity User Field Labels page (PC_USER_FLD_LBL) to create labels for the Project User Fields and Activity User Fields.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup Project User Labels**

This example illustrates the fields and controls on the Project and Activity User Field Labels page.

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Project and Activity User Field Labels

User Field Labels

1-11 of 11

	User Fields	Project User Field Label	Activity User Field Label
1	User Field 1	Field 1	Field 1
2	User Field 2	Field 2	Field 2
3	User Field 3	Field 3	Field 3
4	User Field 4	Field 4	Field 4
5	User Field 5	Field 5	Field 5
6	User Currency	User Currency	User Currency
7	User Amount 1	Amount 1	Amount 1
8	User Amount 2	Amount 2	Amount 2
9	User Amount 3	Amount 3	Amount 3
10	User Date 1	Date 1	Date 1
11	User Date 2	Date 2	Date 2

The new labels defined on the Project and Activity User Field Labels page will be used in place of the generic field names like Field 1, Field 2, Amount 1 and so on. If you do not enter a label for a particular field, the system will use the default label.

The labels entered on this page are used on the Project General and Activity General components, the My Work Exceptions on the Project Costing fluid WorkCenter, the Project Update Wizard tool, the Contracts Workbench and the Third Party Integration Review page.

> **Note**
>
> If Page and Field Configurator is being used to change the label on the page, then the label from Page and Field Configurator will be displayed.

Setting Up Project-Related Information

To set up project-related information, use these components:

- Integration Templates (PROJ_INT_TMPL).
- Project Type (PROJ_TYPE).

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- Status Types (PROJ_STATUS_DEFN).
- Project Type Status Path (PC_PRJSTATCTL_PNLG).
- Project-Processing Status (PC_STATUS_DEFAULT).
- Project Role Definition (PROJ_ROLE).
- Phase Types (PROJ_PHASE_TYPE).
- Events (PROJECT_EVENTS).
- Project Request Types (PC_RQST_TYPE_GBL)

Pages Used to Set Up Project-Related Information

Page Name	Definition Name	Usage
Integration Templates	PROJ_INT_TMPL_01	Describe the project integration template. **Set Up Financials/Supply Chain**, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup PC Integration Templates**
General Integration Page	PROJ_INT_TMPL_02	Identify default purchasing and asset business units for each project integration template.
General Ledger Integration Page	PROJ_INT_TMPL_03	Identify default general ledger business units for each project integration template.
Project Types Page	PROJ_TYPE_DEFN	Create and modify project types. Assign default rate plans or rate sets to project types.
Status Types Page	PROJ_STATUS_DEFN	Create status types and define control actions to limit transactions coming into Project Costing.
Project Type Status Path Page	PC_PRJ_STATCTL_PNL	Define status paths for a particular project type.
Project Status Defaults Page	PC_STATUS_DEFAULT	Establish default project statuses for system-defined processing statuses for projects that are programmatically created.
Project-Processing Status Linkage Page	PC_STATUS_RNCNTL	Schedule the Project-Processing Status Linkage Application Engine process (PC_STAT_LINK) to run nightly or as often as needed by your business processes.
Project Role Page	PROJ_ROLE_PAGE	Create or view project roles. Associate a project role with a craft in PeopleSoft Maintenance Management.
Phase Types Page	PROJ_PHASE_DEFN	Create and modify phase types.

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Page Name	Definition Name	Usage
Events Page	PROJ_EVENT_NAME	Create and modify project events.
Setup Project Request Types	PC_REQUEST_TYPE	Create and modify project request types.

General Integration Page

Use the General Integration page (PROJ_INT_TMPL_02) to identify default purchasing and asset business units for each project integration template.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Integration Templates**, and then **Integration Templates**

Select the General Integration tab on the Integration Templates page.

Enter purchasing and asset business units for transactions that are created by projects that are associated with the integration template. Available values are based on the Integration Template table (PC_INT_TMPL).

> **Note**
>
> Users can overwrite the purchasing business unit on rows that are created in Project Costing with a REQ (Requisition) analysis type. However, when you run the Requisition Loader Application Engine process (PO_REQLOAD), the process converts the purchasing business unit to the one that is defined on the integration template.

General Ledger Integration Page

Use the General Ledger Integration page (PROJ_INT_TMPL_03) to identify default general ledger business units for each project integration template.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Integration Templates**, and then **Integration Templates**, and then **General Ledger Integration.**

For each project integration template, enter general ledger business units for all transactions that integrate with a project and all accounting transactions that are created by the project. Available values are based on the Integration Template General Ledger table (PC_INT_TMPL_GL).

Project Types Page

Use the Project Types page (PROJ_TYPE_DEFN) to create and modify project types.

Assign default rate plans or rate sets to project types.

Navigation:

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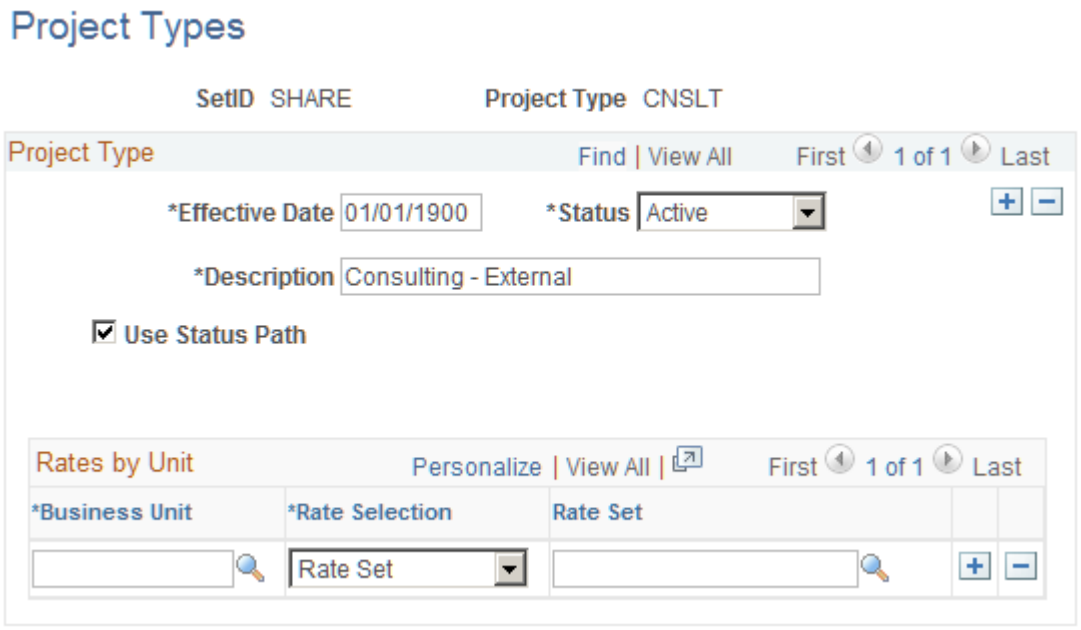
Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup PC Project Types**

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



Use this page to set up project types that are used to group projects into clusters. Project types enable you to easily analyze all projects of a certain type. For example, you can assign construction projects, maintenance projects, and capital projects as project types.

Field or Control	Description
Use Status Path	Select to use a project type status path for the project type. Use the Project Type Status Path page to define status paths. See Project Type Status Paths.

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Field or Control	Description
Auto Review for Billing	Select to automatically mark all transactions for this project type as reviewed, and bypass the requirement for a project manager review. This option is available only if the **Review Required for Billing** option is selected on the Installation Options - Project Costing Integration page. When you create a new project and specify a project type, the project inherits the value of the **Auto Review for Billing** option for the project type, taking into consideration the effective date and status of the option. You can override the **Auto Review for Billing** option at the project type level and for individual projects. If you change the option for the project type: • The system does not automatically update the auto review option at the project level. For example, assume that the auto review option for the project type is enabled on January 1. On January 15, the auto review option is disabled for the project type. The system does not update the auto review option on existing projects. You can, however, manually override the auto review option for individual existing projects. • The system does not automatically update existing transactions that reside in the Project Transaction table. For example, assume that the auto review option for the project type is disabled on January 1. On January 15, the auto review option is enabled for the project type. Unreviewed transactions may already exist in the Project Transaction table. You can review the existing transactions by using the Project Manager Review component.
Auto Review for Period of Performance	Select to automatically review and approve period of performance exceptions for the particular project type. **Note:** This check box is displayed only if Review Required for Period of Performance check box is selected on the Application Fundamentals: Installation Options - Project Costing Integration Page.

Rates by Unit

Field or Control	Description
Business Unit	Enter a business unit for which you will create projects with rates for this project type.
Rate Selection	Select *Rate Plan* or *Rate Set* to determine the column heading and available values that appear for selection in the next column on this page.

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Field or Control	Description
Rate Plan or **Rate Set**	Enter the default rate plan or rate set for the project type and business unit. Available values are based on rate plans and rate sets that are valid for the business unit and are active on the effective date of the project type. Add rows as necessary to assign default rate plans or sets to additional business units that use this project type. **Note:** If you change the default rate plan or rate set on this page, the system does not automatically update the rate plan or rate set on existing projects and activities.

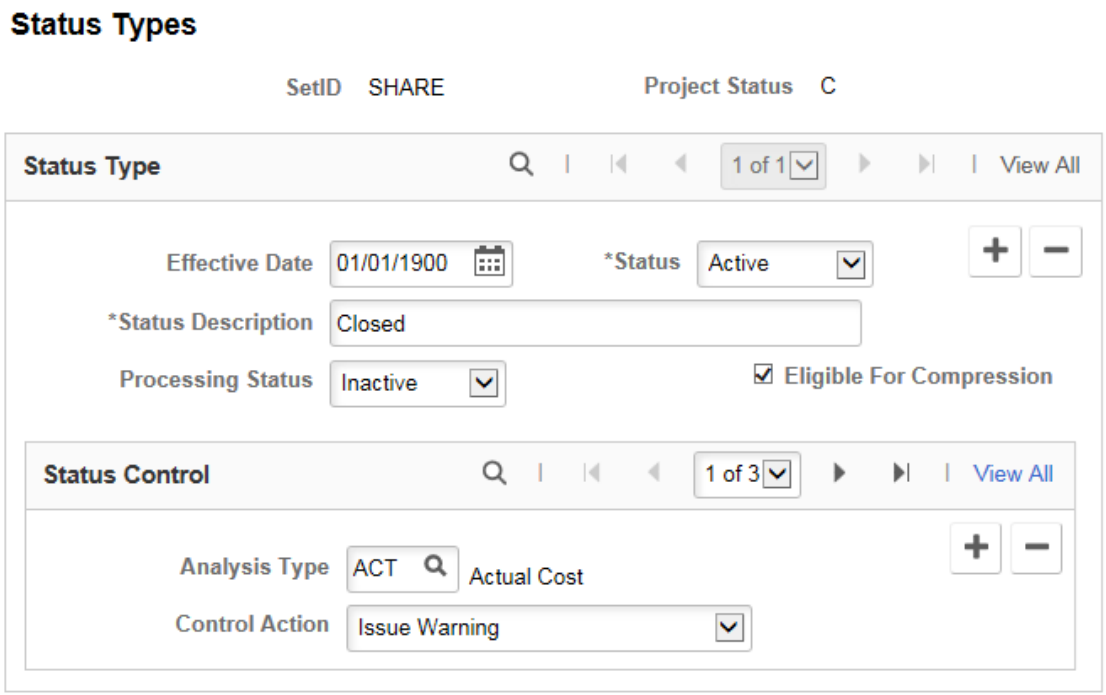
Status Types Page

Use the Status Types page (PROJ_STATUS_DEFN) to create status types and define control actions to limit transactions coming into Project Costing.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup PC Project Status Types**

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



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Field or Control	Description
Effective Date	Enter the date when the status change goes into effect. Status types are effective dated, so multiple statuses can be defined and applied sequentially to a project or activity over time.
Status	Select the status of the effective-dated row. Available values are: *Active:* This is the default value. *Inactive:* Select to deactivate the status control options that are associated with the effective date.
Processing Status	Select the processing status to map to this status type. Available values are *Active, Inactive,* and *Pending*. When you update a project status type, the system automatically updates the processing status based on this mapping.
Eligible For Compression	Select check box to consider the particular project status type for compression. Although the processing status can be *Active* or *Inactive*, Oracle recommends only projects with processing status *Inactive* for compression. This way current transactions will not be affected by the compression.

Status Control

Use this group box to associate a project control action with an analysis type for a particular status type. To control transactions by using status control on a project or activity, the **Enable Status Control** option must be activated on the Installation Options - Project Costing Integration page, the project or activity must contain the specified status type, and the incoming transactions must contain the specified analysis type.

Field or Control	Description
Analysis Type	Enter an analysis type to specify the transactions on which to apply status control options. To enter additional analysis types, add new rows in the **Status Control** group box. **Note:** The analysis types that are used by feeder systems are defined on the Installation Options - Project Costing Integration page.
Control Action	Select a control action to associate with the analysis type. Available values are: *Warning:* Select for a warning message to appear before Project Costing accepts transactions with the analysis type that you specify in the **Analysis Type** field. *Reject:* Select for Project Costing to reject transactions with the analysis type that you specify in the **Analysis Type** field. No project control action occurs if the **Control Action** field is blank.

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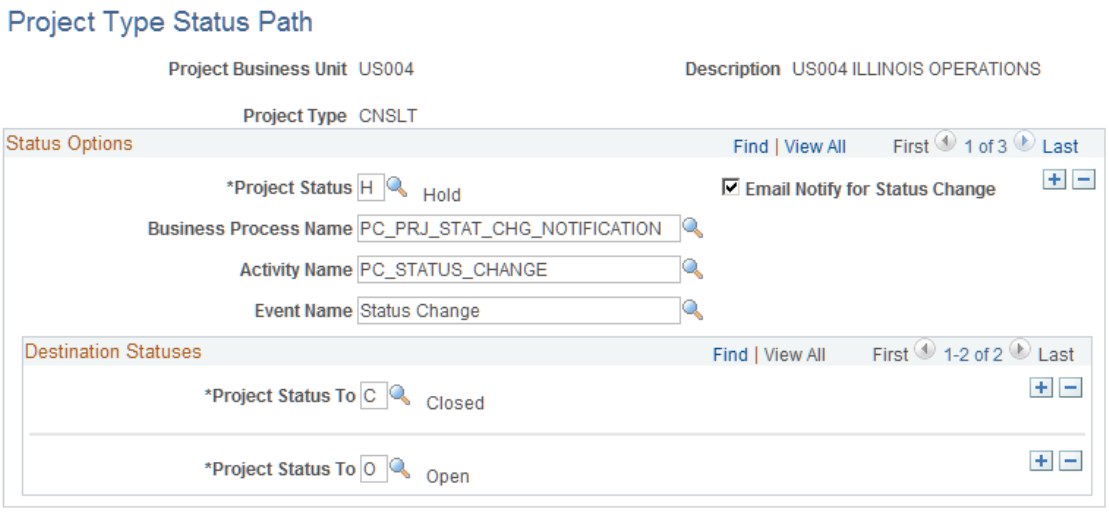
Project Type Status Path Page

Use the Project Type Status Path page (PC_PRJ_STATCTL_PNL) to define status paths for a particular project type.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup PC Proj Type Status Path**

This example illustrates the fields and controls on the Project Type Status Path page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Project Status	Enter the status for the path that you are defining. Available values are based on the Project Status table (PROJ_STATUS_TBL).
Email Notify for Status Change	Select to email project members when the project status changes.
Business Process Name, Activity Name, and **Event Name**	Select the business process, activity, and event to associate with the project type status path.
Project Status To	Select the statuses to which the current status can change. Add rows to add more statuses.

Project Status Defaults Page

Use the Project Status Defaults page (PC_STATUS_DEFAULT) to establish default project statuses for system-defined processing statuses for projects that are programmatically created.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup Project Status Defaults**

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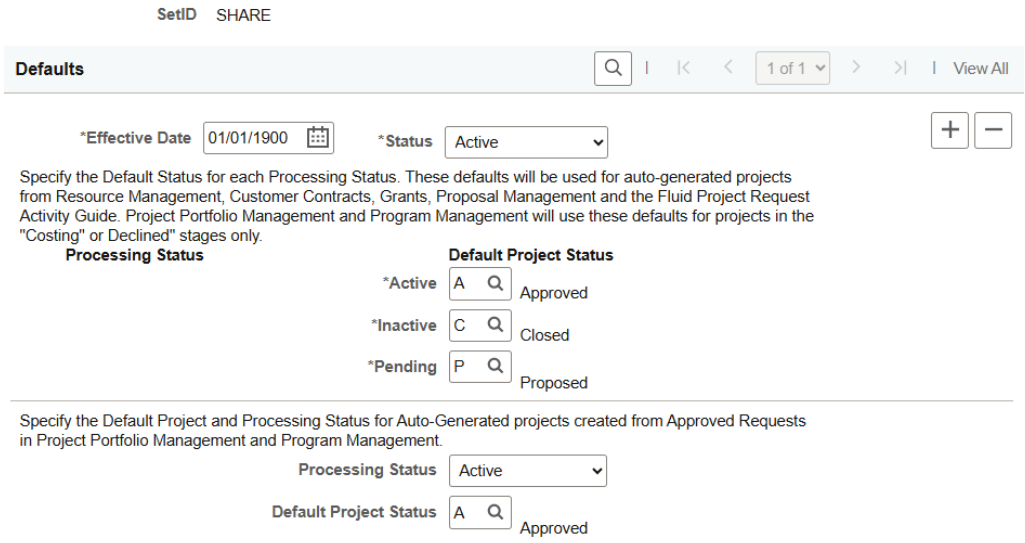
This example illustrates the fields and controls on the Project Status Defaults page. You can find definitions for the fields and controls later on this page.

Project Status Defaults



Field or Control	Description
Status	Enter the status of the project status defaults. Values are *Active* and *Inactive.* The default value is *Active.*
Processing Status - Active, Processing Status - Inactive, and **Processing Status - Pending**	Enter the default statuses to map to the **Active, Inactive,** and **Pending** processing statuses that the system assigns to autogenerated projects from PeopleSoft Resource Management, Contracts, Grants, Proposal Management, and the Fluid Project Request Activity Guide. PeopleSoft Project Portfolio Management and PeopleSoft Program Management use these default statuses only for projects that are created from project requests that are in a Costing or Declined status. If you use PeopleSoft Project Costing without PeopleSoft Program Management, the system uses the project status that you enter for the **Active** processing status as the default value for new projects that you create in Project Costing. If you use PeopleSoft Program Management, the system uses the project status that you enter for the **Pending** processing status as the default value for new projects that you create in PeopleSoft Project Costing.

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Field or Control	Description
Processing Status	Enter the default processing status that the system assigns to autogenerated projects that are created from approved project requests in PeopleSoft Project Portfolio Management and PeopleSoft Program Management.
Default Project Status	Enter the default project status to map to the processing status for projects that are created from approved project requests in PeopleSoft Project Portfolio Management and PeopleSoft Program Management.

Project-Processing Status Linkage Page

Use the Project-Processing Status Linkage page (PC_STATUS_RNCNTL) to schedule the Project-Processing Status Linkage Application Engine process (PC_STAT_LINK) to run nightly or as often as needed by your business processes.

Navigation:

Project Costing, and then **Utilities**, and then **Project-Processing Status Link**, and then **Project-Processing Status Linkage**

This process refreshes the status linkage between the project processing status and the project status. Because the project status is effective dated you can have future dated values. The Project-Processing Status Linkage process updates the processing status when the current date reaches the effective date.

Project Role Page

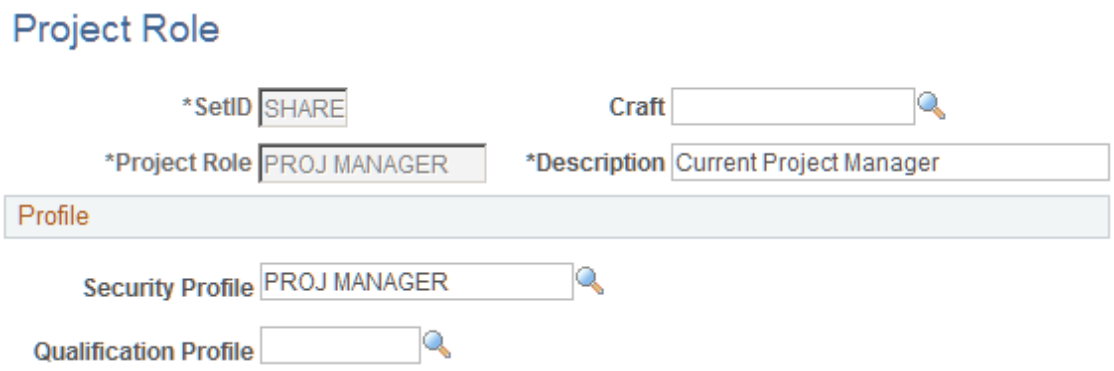
Use the Project Role page (PROJ_ROLE_PAGE) to create or view project roles.

Associate a project role with a craft in PeopleSoft Maintenance Management.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup PC Project Roles**

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



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Project roles are defined by two profiles—the security profile and the qualification profile.

Field or Control	Description
Craft	Select a craft from the Maintenance Management Craft table (RS_CRAFT_DETAIL) to associate with this project role. The system uses this association to assign crafts to resources when you create work orders from activities. The value that you enter in this field appears as the default value in the **Craft** column on the Create Work Order page for resources with this project role. This field is available only if you use PeopleSoft Maintenance Management.
Security Profile	Enter the security profile that defines the role's access to projects, activities, and transactions. Available values are defined on the Security Profile page (PROJ_SEC_PROFILE). See Defining Project Security.
Qualification Profile	Enter the qualification profile that the PeopleSoft Resource Management system uses for staffing. Available values are defined on the Qualification Profile page (RS_RESRC_TEMPLT) in PeopleSoft Resource Management. See PeopleSoft Resource Management: Creating Qualification Profiles.

> **Note**
>
> You must install PeopleSoft Program Management to integrate with PeopleSoft Resource Management for staffing.

Events Page

Use the Events page (PROJ_EVENT_NAME) to create and modify project events.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup Project Events**

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

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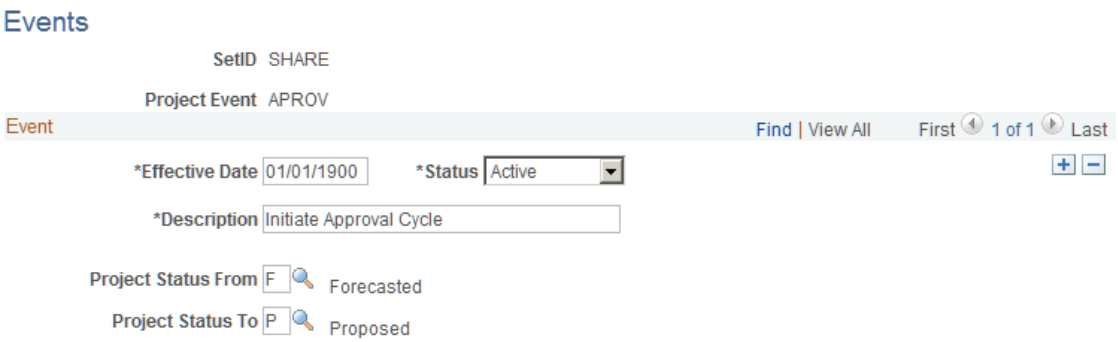

You must define project status types before you define project events.

Field or Control	Description
From Status Type and **To Status Type**	Enter the **From Status Type** and **To Status Type** that mark an event for a project.

Use the Project Definitions - Approval page to define approval sequences for project events.

Setup Project Request Types

Use the Setup Project Request Types page (PC_REQUEST_TYPE) to create and modify project request types. The project request type is selected by the Project Requester on the Project Request Page. Customers can use the Request Type as criteria in the Page and Field Configurator to identify the fields displayed to the requester.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Project Options**, and then **Setup Project Request Types**

This example illustrates the fields and controls on the Setup Project Request Types page. You can find definitions for the fields and controls later on this page.

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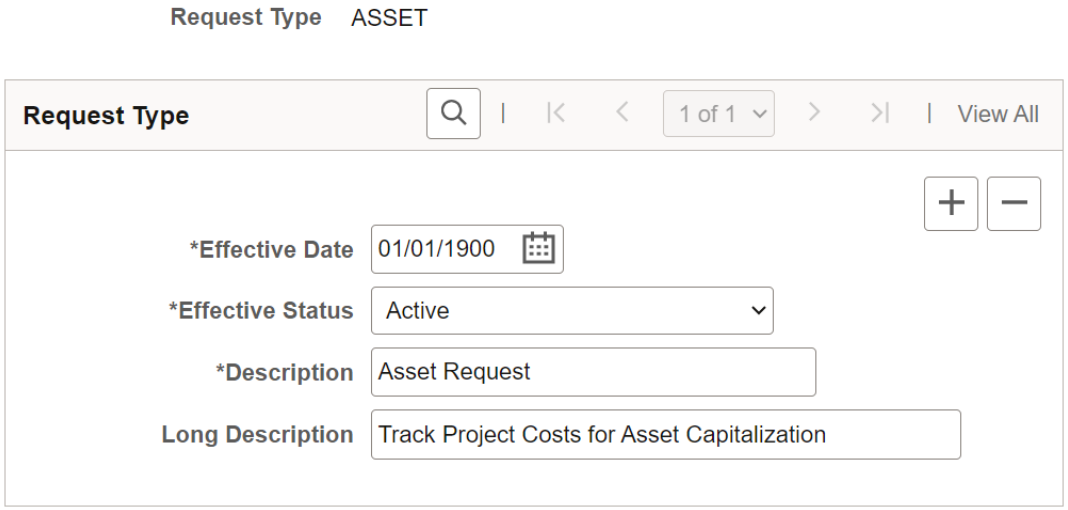
Setup Project Request Types



Field or Control	Description
Request Type	Select the project request type.
Effective Status	Select *Active* or *Inactive* as the effective status.

Setting Up Activity-Related Information

To set up activity-related information, use these components:

- Activity Types (PROJ_ACTIVITY_TYPE).
- Activity Type Status Path (PC_ACTSTATCTL_PNLG).
- Quality Types (PROJ_QUALITY_DEFN).
- Define Standard Activities (FS_ACTIVITY_TBL).

Use the PC_STD_ACT_INTFC component interface to load data into the tables for the FS_ACTIVITY_TBL component.

Pages Used to Set Up Activity-Related Information

Page Name	Definition Name	Usage
Activity Types Page	PROJ_ACT_DEFN	Create activity types.
Activity Type Status Path Page	PC_ACT_STATCTL_PNL	Define the status path for activities.

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Page Name	Definition Name	Usage
Activity Options - Quality Types Page	PROJ_QUALITY_DEFN	Create and modify quality types. To access this page, select **Set Up Financials/Supply Chain**, and then **Product Related**, and then **Project Costing**, and then **Activity Options**, and then **Setup PC Activity Quality Type**.
Standard Activities Page	FS_ACTVITY_TBL1	Create and modify standard activities.

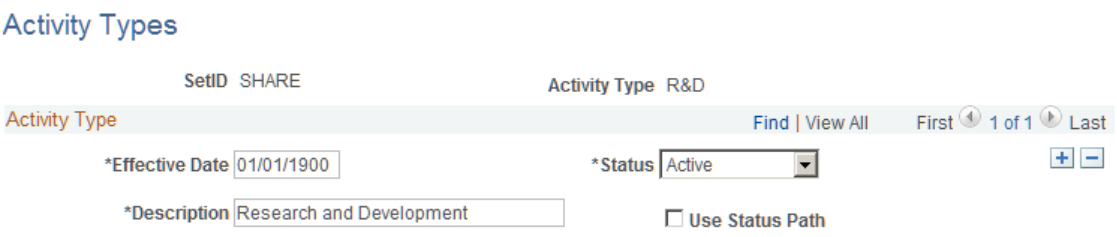
Activity Types Page

Use the Activity Types page (PROJ_ACT_DEFN) to create activity types.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Activity Options**, and then **Setup PC Activity Types**

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



Activity type labels identify and group activities to facilitate analysis and reporting on similar activities across projects.

Field or Control	Description
Status	Select the status that determines the availability of an activity type.
Use Status Path	Select to enforce the predefined progression of statuses for activities of this type.

Related Topics

- PeopleSoft Project Costing Reports: A to Z
  This topic provides a table that lists the PeopleSoft Project Costing reports, sorted alpha-numerically by report ID.
- Understanding Integration of PeopleSoft Project Costing with Microsoft Project
  This topic lists prerequisites and discusses:

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Activity Type Status Path Page

Use the Activity Type Status Path page (PC_ACT_STATCTL_PNL) to define the status path for activities.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Activity Options**, and then **PC Activity Type Status Path**

You must define status types before you define activity type status paths. Activities use the same status type data that you define at the project level.

The procedure to define activity type status paths is the same as the procedure to define status paths for projects.

See Project Type Status Paths.

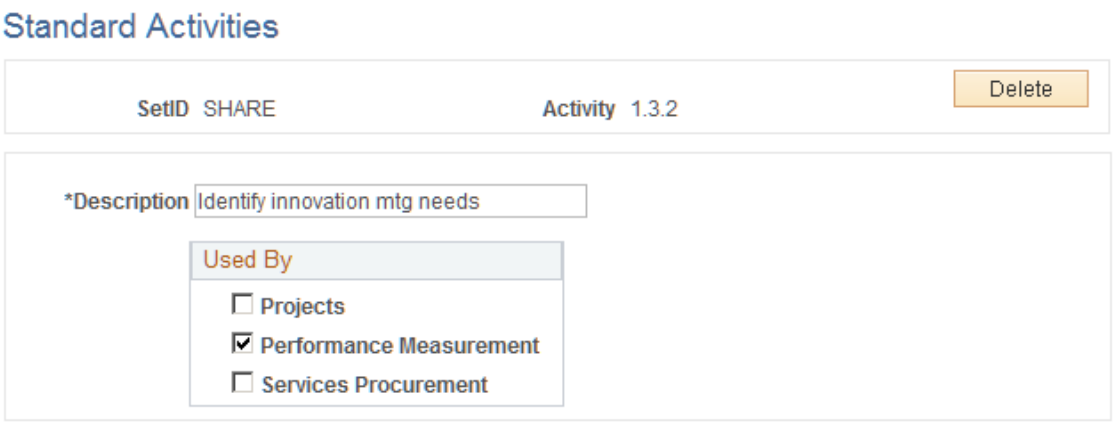
Standard Activities Page

Use the Standard Activities page (FS_ACTVITY_TBL1) to create and modify standard activities.

Navigation:

Set Up Financials/Supply Chain, and then **Common Definitions**, and then **Activities**, and then **Setup Standard Activities**

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



Use this page to predefine activities that users can assign to projects.

Standard activities are keyed by SetID and based on project type. To enable standard activity functionality, select the **Standard Activities** check box on the Project Costing Definition page for a project. Using standard activities is optional.

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Field or Control	Description
Project Type	Enter a project type to restrict the use of this standard activity to projects that have the selected project type and have **Standard Activities** selected on the Project Costing Definition page. This field appears if you select **Projects** in the **Used By** group box. Leave this field blank for this standard activity to be available to add to any project that does not have a project type assigned.
Used By	*Projects:* Select for this activity to be available to add to a project as a standard activity. *Performance Measurement:* Not used in PeopleSoft Project Costing. *Services Procurement:* Not used in PeopleSoft Project Costing.

Related Topics

- Project Definitions - Project Costing Definition Page
  Use the Project Definitions - Project Costing Definition page (PROJECT_GEN_01) to define various project options, project currency, and analysis groups.
- Adding Activities to Projects

Setting Up Transaction-Related Information

To set up transaction-related information, use these components:

- Analysis Types (PROJ_ANALYSIS_TYPE)
- Analysis Groups (ANALYSIS_GRP_DEFN)
- Resource Groups (PROJ_RES_GRP_DEFN)
- Transaction Identifiers (PC_TRANS_IDENTIFY)

Pages Used to Set Up Transaction-Related Information

Page Name	Definition Name	Usage
Analysis Types Page	PROJ_ANTYPE_DEFN	Create and modify analysis types.
Analysis Groups Page	PROJ_AN_GRP_MAP	Create and modify analysis groups.
Analysis Groups - Description Page	PROJ_AN_GRP_DEFN	Describe the purpose of the analysis group.
Source Groups Page	PROJ_RT_GRP_MAP	Create and modify source groups.
Source Groups - Description Page	PROJ_RT_GRP_DEFN	Describe the source group.
Transaction Identifiers Page	PC_TRANS_IDENTIFY	Define transaction identifiers that consist of groups of project ChartField values.

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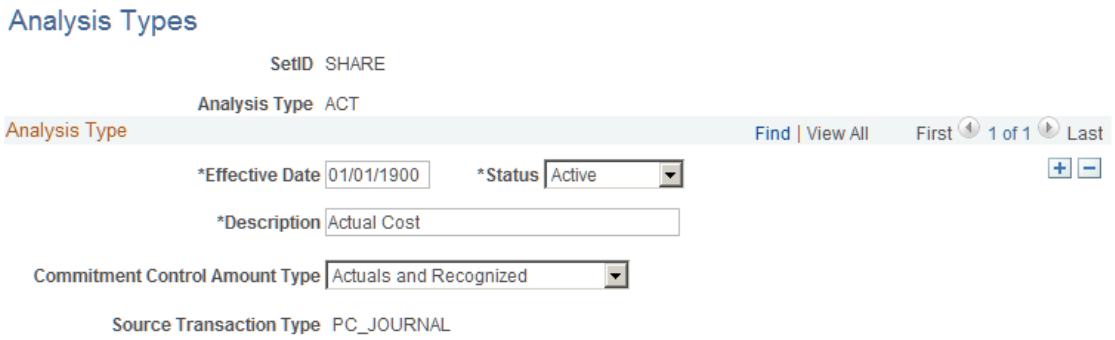
Analysis Types Page

Use the Analysis Types page (PROJ_ANTYPE_DEFN) to create and modify analysis types.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **Setup PC Analysis Types**

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



Field or Control	Description
Commitment Control Amount Type	Select an amount type that tells Commitment Control how to process transactions. This field is directly related to the type of transaction that is coming into Commitment Control and identifies what type of transaction to process. This field appears only if the Commitment Control feature is activated.
Source Transaction Type	Displays the source transaction type defined in the Commitment Control feature, which maps Project Costing fields to Commitment Control fields. The two source transaction types are *PC_JOURNAL* and *PC_BUDGET*. This field appears if the Commitment Control feature is activated.

See PeopleSoft Commitment Control: Understanding Source Transaction Type Setup.

Analysis Groups Page

Use the Analysis Groups page (PROJ_AN_GRP_MAP) to create and modify analysis groups.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **Setup PC Analysis Groups**

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

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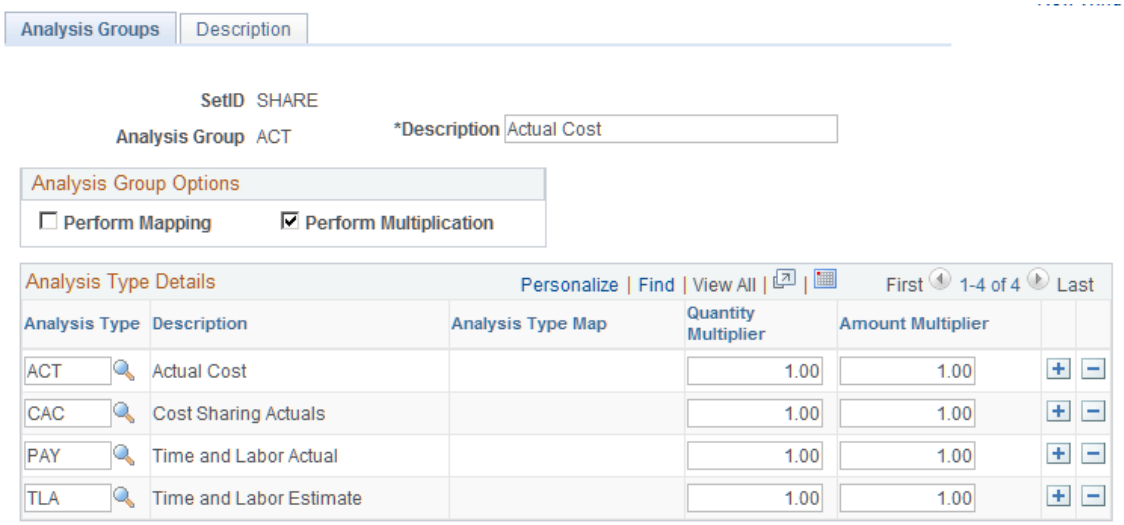

Note

If your organization uses PeopleSoft Fluid User Interface pages to manage projects and you change an analysis group for cost, billing, or revenue on this page, you should run the Refresh Reporting Tables process (PC_SUM_PR) using the Refresh Reporting Tables Page.

Field or Control	Description
Perform Mapping	Select to use the analysis group for mapping analysis types from a template to a new project or activity.
Perform Multiplication	Select to manipulate transaction quantities and amounts. Enter multipliers in the **Quantity Multiplier** and **Amount Multiplier** fields.
Analysis Type	Select the analysis types to include in the analysis group.
Analysis Type Map	Select the analysis type to which the analysis type in the first column will be converted in the newly created project or activity. These fields appear only if you select the **Perform Mapping** option.
Quantity Multiplier and **Amount Multiplier**	Enter a factor that the system uses to modify incoming quantity and amount values. Enter multipliers of zero to copy quantities and amounts into new projects as zero.

Source Groups Page

Use the Source Groups page (PROJ_RT_GRP_MAP) to create and modify source groups.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **Setup PC Source Groups**

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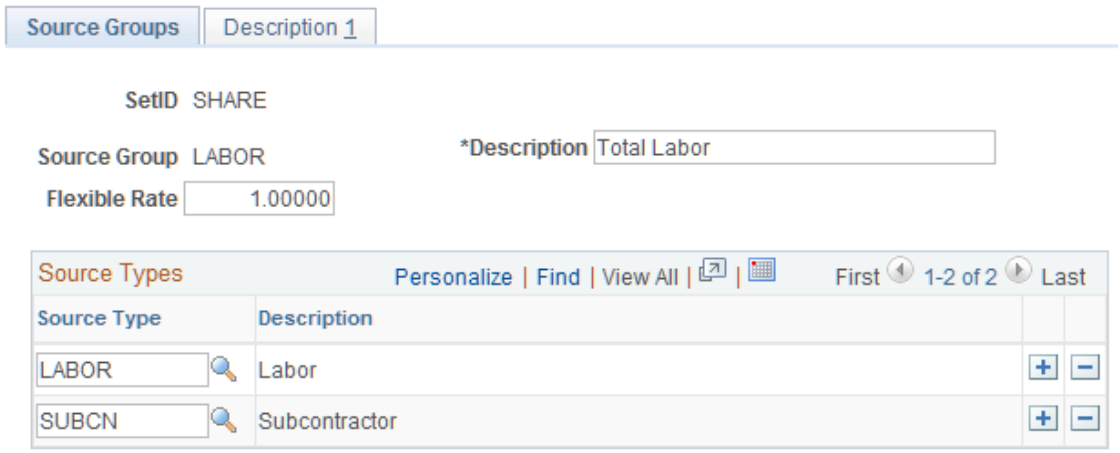
This example illustrates the fields and controls on the Source Groups page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Flexible Rate	Enter a rate by which to multiply the source types in this source group to create a special project view.
Source Types	Select the source types to include in the source group.

Transaction Identifiers Page

Use the Transaction Identifiers page (PC_TRANS_IDENTIFY) to define transaction identifiers that consist of groups of project ChartField values.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **PC Transaction Identifiers**

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

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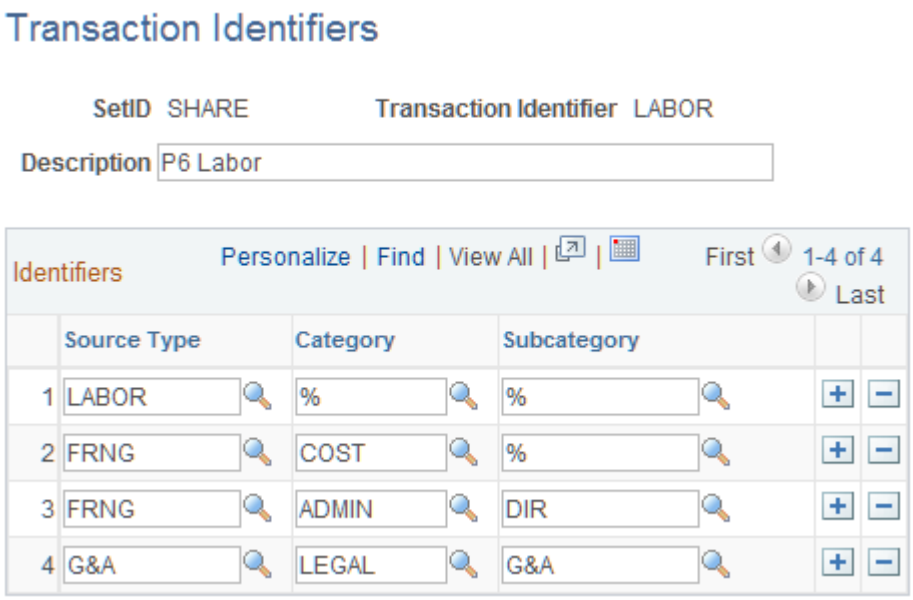

Enter source type, category, and subcategory rows that are valid combinations of project ChartField values. Use the wildcard value (a percent sign) in a field to indicate that any value for that field is valid in combination with the other field values in that row. Although the system prevents the creation of duplicate rows within a transaction identifier, an identical row can be part of other transaction identifiers.

Related Topics

- Defining Tiered Pricing
- PeopleSoft Contracts: Understanding Pricing Contracts

Setting Up Summarization Templates

Summarization Templates are used during the feeder interface process (such as PC_EX_TO_PC), the Pricing process (PC_PRICING), the Variance Pricing process (PC_VAR_PRICE) and for reporting (PC_SUM_PR).

For additional information about Feeder and Pricing Summarization, see Understanding Feeder and Pricing Summarization.

For additional information about Variance Pricing, see Understanding Variance Pricing.

Page Used to Set up Summarization Templates

Page Name	Definition Name	Usage
Summarization Template Page	PC_SUM_TEMPLATE	Define summarization rules for feeder integration applications, the Pricing process, and the Variance Pricing process.

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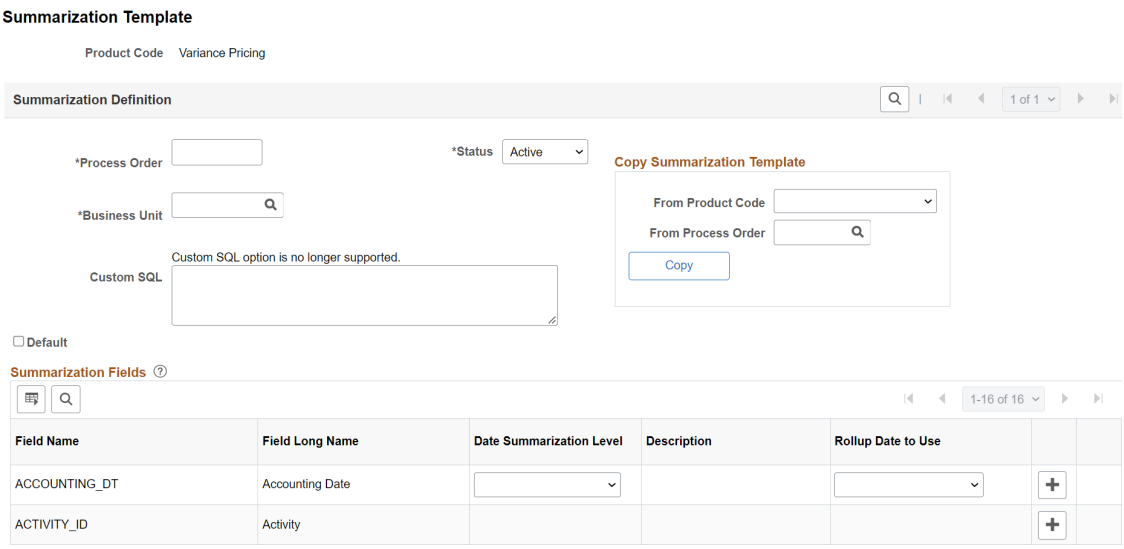
Summarization Template Page

Use the Summarization Template page (PC_SUM_TEMPLATE) to define summarization rules for feeder integration applications, the Pricing process, the Variance Pricing process, and for reporting

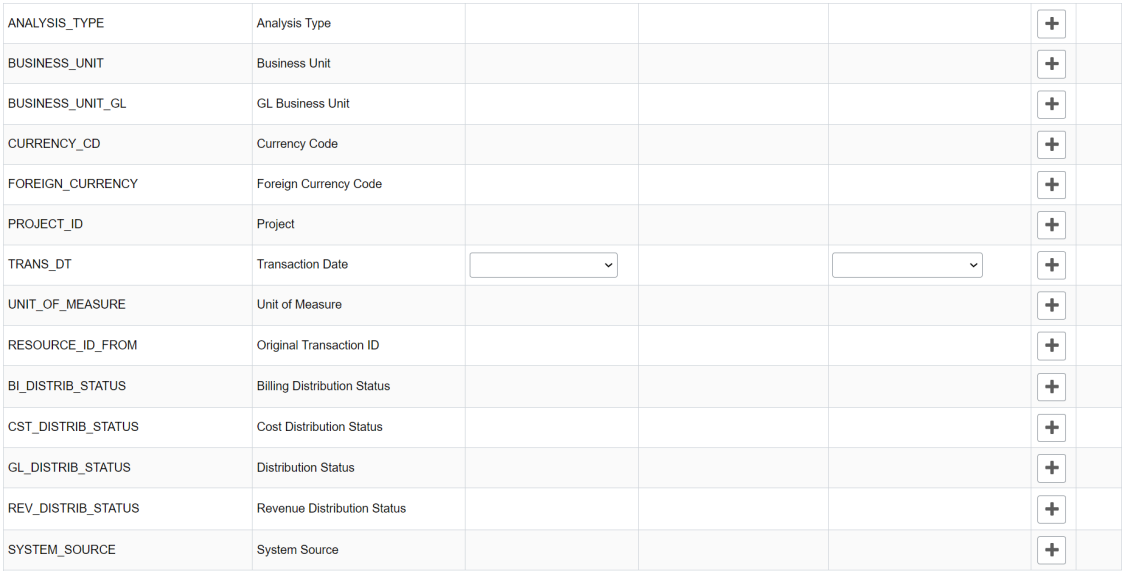
Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Summarization Tmplt**

This example illustrates the fields and controls on the Summarization Template (1 of 2) page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Summarization Template (2 of 2) page. You can find definitions for the fields and controls later on this page.



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If you have selected the corresponding check box on the Project Costing Integration page, in the Summarization Options group box, then Use this page to create summarization templates. Summarization templates determine the fields and the level of summarization that the system should use when these processes run:

Option selected in the Summarization Options group box	Processes
Expenses	PC_EX_TO_PC
General Ledger	PC_GL_TO_PC
Third Party Loader	PC_INTF_GEN and PC_INTFEDIT
Pricing Engine	PC_PRICING
Variance Pricing	PC_VAR_PRICE
Time and Labor	PC_TL_TO_PC
Payables / Purchasing	PC_AP_TO_PC, PC_PO_TO_PC, and PC_POADJUST
Project Reporting Tables	PC_SUM_PR

The results of the Variance Pricing process are posted to the PROJ_RESOURCE table, or can be reviewed prior to posting to the PROJ_RESOURCE table.

Field or Control	Description
Product Code	Select a product code that identifies to which the template applies. For example, Expenses, General Ledger, Payables / Purchasing, Pricing Engine, Project Reporting Tables, Third Party Loader, Time and Labor, or Variance Pricing. **Note:** Multiple templates can be created for a product code, but only one template (per product code) can be designated as the default template.
Process Order	Enter a number that determines the order in which the template is processed when multiple templates are defined for a product code. The process order does not have to be consecutive and you can leave gaps in the process order. For example, you can enter 10, 20, and 30 as the process order for a product code. Leaving gaps in the process order enables you to insert templates between existing templates at a later time.
Default	Select to indicate that the template is the default template. The default template is applied to all detail rows that do not match any of the existing templates for the product code. It is not required to have a default template for a product code. If you do not define a default template, then any data that does not match the criteria of an existing template is not summarized. For example, if you have a template for business unit US001 and no default template is defined, then data for business units US002 and US003 is not summarized.

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Field or Control	Description
Custom SQL	The Custom SQL option was removed in Update Image 46. Existing templates will continue to function but cannot be adjusted. New templates cannot use the Custom SQL option.
Copy From Project (group box)	Use this group box to populate the Summarization Fields group box from an existing summarization template. When you click the Copy button, existing data in the Summarization Fields group box are deleted and replaced with the data being copied.
Field Name	Add non-required fields to include in the summarization selection process. When creating a template, the system automatically populates all required field names. Required fields names are display only and cannot be deleted. For Microsoft SQL and Sybase database platforms, you can only have a maximum of 32 fields, which includes the required and non-required fields.
Date Summarization Level and **Rollup Date to Use**	Enter a date type that determines how dates are to be rolled up by the summarization process. These fields are only displayed for date fields. The rollup date that you use can impact effective dating. When setting up a date field, make sure that the effective date of your rate plan or rate set are valid with the roll up date. For example, when creating a pricing summarization template, you select *Start of Period* in the **Rollup Date to Use** field. This indicates that the summarized rows are assigned an accounting or transaction date of the start of the period, such as January 1, 2010 (01/01/2010). You should verify that the rate plan or rate set that you are using has an effective date of January 1, 2010, or earlier, for all transactions to be summarized.

If you leave a field off of the summarization template you are indicating that the information in that field is not necessary. Therefore, if a field is left off of the template, the field is populated with these values on the summarized transaction:

- Blank – if the field is a string field.
- Zero – if the field is a number field.
- Null – if the field is a date field.

Because leaving a field off of the summarization template results in a blank, or zero, value in the summarized transaction, you should use caution when deciding to not include the Project Costing ChartFields and General Ledger ChartFields. If you use the Project Costing ChartFields such as source type, category, and subcategory, Oracle's PeopleSoft recommends that these fields be included on summarization templates.

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Pricing Summarization Templates

When creating a pricing summarization template, Oracle's PeopleSoft recommends that you include these fields, at a minimum:

- CONTRACT_NUM
- CUST_ID
- RESOURCE_TYPE
- RESOURCE_CATEGORY
- RESOURCE_SUB_CAT
- DESCR

If you are using Time and Labor integration and Pricing Summarization, but are not using Time and Labor summarization, then you should include these fields on the Pricing Summarization Template:

- EMPLID
- EMPL_RCD
- SEQ_NBR

Time and Labor Summarization Templates

When creating a Time and Labor summarization template, you must include these fields to reconcile billed estimates with new estimates and actuals. (The first two are required and will generate errors if you leave them off a template but the third field is suggested and will generate a warning to be used if you are doing any type of billing):

- EMPLID
- EMPL_RCD
- BI_DISTRIB_STATUS

Processing Order Templates

A Processing Order Template is a user defined template that enables you to define an order and priority of processing for each transaction, matching specific criterion when processing transactions in the Limits process (CA_LIMITS). Any field used in the Processing Order Template should also be present in the Project Costing Summarization Template so that data corresponding to that particular filed is available from the Project Costing Summarization process.

See PeopleSoft Contracts: Setting Up a Processing Order Template.

Project Reporting Tables

When creating a summarization template for the Project Reporting Tables product code, the system pre-populate these fields:

- CONTRACT_NUM
- CONTRACT_LINE_NUM
- CUST_ID
- BI_DISTRIB_STATUS
- CST_DISTRIB_STATUS

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- REV_DISTRIB_STATUS
- GL_DISTRIB_STATUS
- SYSTEM_SOURCE

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5

Securing Data in PeopleSoft Project Costing

Understanding PeopleTools Security

To provide Project Costing users with access to application functions that are essential to performing their jobs, you create security roles and assign them to individual user profiles. Attached to each security role are permission lists which provide access to application pages and processes that are required to perform the job tasks.

This topic discusses important PeopleTools components that you use to secure objects and definitions in your PeopleSoft system.

Permission Lists

Permission lists are the building blocks of PeopleTools user security authorization. A permission list grants a particular degree of access to specified PeopleSoft elements such as pages, portals, menus, component interfaces, development environments, signon time periods, administrative tools, personalizations, and so on. Permission lists are specific to a specific set of objects that are necessary to support a unique security role. Security roles might have overlapping—but not identical—access requirements. You typically define permission lists before you define security roles and user profiles.

Project Costing delivers preconfigured sample permission lists that grant access to various pages. These permission lists support the sample functional security roles that are delivered with the application.

> **Important**
>
> If you modify a permission list, you change the access for all users who are assigned to security roles that are associated with the permission list.

See *PeopleTools: Security Administration,* "Setting Up Permission Lists."

This table lists some of the delivered sample permission lists that provide access to Project Costing, and typical security roles that are associated with each permission list:

Permission List	Description	Typical Security Roles
EPPC2000	Project and Activity Setup	Project Manager, Resource Manager, Contract Administrator, Grants Administrator, Proposal Planner

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Permission List	Description	Typical Security Roles
EPPC2100	Project and Activity Team	Project Manager, Resource Manager, Contract Administrator, Grants Administrator, Proposal Planner
EPPC2500	Project Budgeting	Project Manager, Budget Approver, Grants Administrator, Proposal Planner
EPPC2700	Project Resource Adjustment	Project Manager, Project Accountant, Time and Expense Administrator, Grants Administrator, Proposal Planner
EPPC3100	Contract and Billing Integration	Project Manager, Billing Manager, Billing Coordinator, Grants Administrator, Proposal Planner
EPPC4000	Project Asset Capitalization	Project Manager, Project Accountant, Financial Asset Manager, Grants Administrator, Proposal Planner
EPPC6100	Financial Analysis	CFO, Treasurer, Financial Analyst, Project Manager, Resource Manager, Budget Approver, Financial Asset Manager, Time and Expense Administrator, Buyer, Engineer, Grants Administrator, Proposal Planner
EPPC7000	Third-Party Interface/Review	Project Manager, Project Accountant, Grants Administrator, Proposal Planner
EPPC9001	Project Costing Accounting Setup	Project Manager, Project Accountant, Application Administrator, Contract Administrator, Grants Administrator, Proposal Planner

Note

This table contains a subset of the delivered Project Costing permission lists. To view all of the Project Costing permission lists, go to **PeopleTools**, and then **Security**, and then **Permissions & Roles**, and then **Permission Lists** and search for permission lists that begin with *EPPC.*

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Row-level Security

With row-level support, you can implement security to provide individual users or permission lists with access to a page, but you do not have to provide access to all rows in the table when the page is accessed. This type of security is typically applied to tables that hold sensitive data. For example, you can implement row-level security in Project Costing to restrict access to specific projects.

The PeopleTools security system determines which data permissions to grant to a user by examining the primary permission list and row security permission list. The permission list that the system uses varies by application and data entity, such as employee, customer, or business unit. Project Costing uses the row security permission list value to determine a user's access to projects if you implement permission list-level security.

> **Note**
>
> Row-level security *does not* restrict the data that is selected by batch processes.

See Application Fundamentals: Defining Row-Level Security.

User Profiles and Security Roles

Security roles are essentially collections of permission lists, which determine the pages that users can access. You can assign one or more permission lists to a security role. The resulting combination of permissions can apply to all users who share those access requirements. However, the same group of users might also have other access requirements that they don't share with each other. You can assign:

- A permission list to multiple security roles.

  Permission lists define access to specific portals and components based on the user's security role.
- A security role to multiple user profiles.
- Multiple security roles to a user profile.

  User permissions are based on the combined permissions that are assigned to all of the user's security roles.

User profiles define individual PeopleSoft users. Each user is unique. The user profile specifies a number of user attributes, including one or more assigned security roles. After you create security roles, create user profiles and associate them with security roles. The values for a user's page access are inherited from the associated security roles.

To set up security roles and user profiles in PeopleTools:

- Create security roles in the Role Maintenance component (ROLEMAINT).
- Assign permission lists to security roles.
- Create user profiles in the User Profile Maintenance component (USERMAINT).
- Assign security roles to user profiles.

See *PeopleTools: Security Administration,* "Administering User Profiles."

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Project Costing provides sample data that contains several preconfigured security roles based on functional tasks that are typically performed by an employee who is assigned to that security role. Each preconfigured security role comes with access to the set of pages within the application that correspond to the functional tasks of that security role. For example, a project manager can access pages that are used for every project management business process task, but a time and expense administrator can only access pages to make resource adjustments, perform expenses integration, perform time and labor integration, and create summary and variance reports.

This table lists three of the sample security roles that are delivered with the PeopleSoft system:

Security Role	Description
Project Manager	Responsible for creating project plans, identifying activities, assigning responsibilities, determining budget, checking budget compliance, tracking project costs and expenses, billing customers, making payments, and adjusting resources.
Project Accountant	Responsible for setting up the project infrastructure, such as ChartFields, for the expenditures that are associated with projects.
Application Administrator	Responsible for the initial setup and ongoing maintenance for the application.

> **Note**
>
> This table contains a subset of sample security roles that you can use in Project Costing. To view security roles, go to **PeopleTools**, and then **Security**, and then **Permissions & Roles**, and then **Roles.**

Understanding Project Security

At the project level, you can define security in Project Costing as:

- Tree-based security that grants access to projects based on the project tree hierarchy.
- List-based security that grants access to individual projects, regardless of their positions on a tree.
- Team-based security that grants access to projects based on an employee's membership in a project team.

By combining PeopleTools and Project Costing security types, four methods for implementing project row-level security are possible. You can use only one of these methods to secure Project Costing data:

- Team-based security.
- User, tree-based security.
- Permission list, tree-based security.
- Permission list, list-based security.

Additionally, the project security profile further defines security for these four security types. The security profile is associated with a project role, and is the ultimate authority for

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determining access to project data. When you implement project row-level security, security profiles control read/write access to projects, activities, and transactions. Project team members with the same project security profile have access to the same data.

Related Topics

- Application Fundamentals: Understanding PeopleSoft Application Security

Team-Based Security

Two factors determine access to data in team-based security:

- Membership in the project team.
- Project security profile of the member.

In team-based security, access to a project is limited to people defined as project team members by the project manager or administrator. When you use team-based security, the project manager or administrator is automatically added to the team and granted access to project data.

Project managers and administrators can grant access to a project by assigning members to the project team. Being a project team member in a team-based security system, however, does not necessarily grant access to any project data. The user must be a team member *and* have a project role with a security profile that permits access to project data.

Viewing Security Data

There are two different views of the same security data:

- The Project Definitions - Team page lists all members of a project team with each team member's project role.
- The Project Security page lists all projects for which the user is a team member, and the member's security profile for each project.

Copying a Team-Based Project

You can copy team members and their security profiles when you copy projects.

User, Tree-Based Security

Three factors determine access to data in user, tree-based security:

- Access to a tree node (project).
- Position of the node on the tree.
- Project security profile.

You specify the project tree on the Project Security page that the system uses for controlling project security. Grant each user access to nodes on this project tree to define the projects to which the user has access. The user's security profile defines the degree and type of access that the user has to project data.

PeopleSoft delivers the PROJECT_BU tree structure for use in creating project security trees for row-level security.

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Restricting and Allowing Access to Child Projects

With tree-based security, users have the same degree and type of access to the child projects of the selected project. Denying access to a project (node) on a project tree can also deny access to all of its child projects.

To restrict access to a parent project, but allow access to specific child projects:

1. Select a security profile that has *No Access* to the project for the parent project.
2. Select a security profile that has *Read/Write* or *Read only* access to the project for each child project.

To allow access to a parent project, but restrict access to specific child projects:

1. Select a security profile that has *Read/Write* or *Read only* access to the project for the parent project.
2. Select a security profile that has *No Access* to the project for each child project.

> **Note**
>
> The default security for new trees is *No Access.* To implement minimal security, grant users access to the top node on each tree so that all of the nodes below it are accessible.

Permission List, Tree-Based Security

Three factors determine access to data in permission list, tree-based security:

- Permission list—defining access to folders and content references in portal navigation.
- Tree-based—defining access to projects based on their inclusion in, and position on, a tree.
- Project security profile—defining the degree of project data access and the access type.

Users with access to a permission list can access projects that belong to a tree that is attached to that permission list. All users with the same row security permission list have the same project access when you use permission list-level security. You can assign only one security profile to the permission list for each project. The degree of access to project data and the access type are defined by either the security profile that is assigned to a project on the tree, or the security profile for the parent project. You can attach a project tree to more than one permission list.

Restricting and Allowing Access to Child Projects

When security is defined for a parent project, all child projects inherit the same permission as the parent.

To restrict access to a parent project, but allow access to specific child projects:

1. Select a project security profile that has *No Access* to the project for the parent project.
2. Select a project security profile that has *Read/Write* or *Read only* access to the project for each child project.

To allow access to a parent project, but restrict access to specific child projects:

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1. Select a project security profile that has *Read/Write* or *Read only* access to the project for the parent project.
2. Select a project security profile that has *No Access* to the project for each child project.

> **Note**
>
> The default security for new trees is *No Access.* Therefore, you must set up project tree security to provide access to any trees. To implement minimal security, grant access to the top node on each tree that you create so that the nodes beneath it are accessible.

Related Topics

- Application Fundamentals: Understanding PeopleSoft Application Security

Permission List, List-Based Security

Three factors determine data access in permission list, list-based security:

- Permission list—defining access to folders and content references in portal navigation.
- List-based—defining access to individual projects selected from a list of projects, not from a tree.
- Project security profile—defining the degree of project data access and the access type.

Users with access to a permission list can access projects that are attached to that permission list. Projects are selected from a list of existing projects instead of from a tree. All users with the same row security permission list have the same project access when you use permission list-level security. You can assign only one security profile to the permission list for each project. The degree of project data access and the access type are defined by the security profile for the combination of permission list and project. You can attach a project to more than one permission list.

When permission list, list-based security is defined, users:

- Have access only to specific folders and content references that are defined by their permission lists.
- Have access only to specific projects that are attached to their row security permission list.
- Are limited to the amount of project data and type of access based on the assigned security profile for that permission list and project combination.

Viewing Security Data

If you use permission list, list-based security, the Security by Permission List page appears in the Project General component (PROJECT_GENERAL). This page shows all of the permission lists to which the project is attached, and provides the project manager or administrator with a view of all permission lists that have access to their projects.

Copying Security Definitions

Security definitions are copied when you create a new project by using the Project Copy utility. Access to the new project is restricted to the type of access allowed by the source project. Tree-based security rules are not copied.

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Related Topics

- Application Fundamentals: Understanding PeopleSoft Application Security

No Project Security

You can decide not to implement row-level security for projects. When you select *No Security* on the Security Options page:

- All components are accessible.
- All projects are accessible from Tree Manager.
- All projects appear in project prompts.

You can enforce security to restrict time and expense charges to projects even if you don't implement row-level security for projects. Select an option at the business unit or project level to enable only team members to charge time to projects and activities.

See Defining Project Options.

Project Security Profiles

The project security profile is a subset of the project role, and is the final authority for determining access to projects, activities, and transactions. Project team members with the same project role have the same security profile and access to the same data.

The security profile defines a user's access type—no access, read-only, or read and write permission—to project data. The profile defines access to transactions based on analysis groups. After you define an access type and analysis groups for a project security profile, all users or permission lists that are attached to the profile acquire that access type.

Project security profiles are keyed by tableset ID and can be different for each business unit. For example, a security profile for business unit 1 can grant access to a greater level of data than the same security profile in business unit 2. You can also create different project security profiles for different projects.

This table lists examples of project security profiles and their typical functions:

Project Security Profile	Typical Functions
Project manager, project owner, application administrator	Create projects and activities, budgets, cost analyses, forecasts, and status. The security profile typically provides read/write access to projects and activities for transactions in all analysis groups.
Project accountant	Generates bills, creates assets, and performs other accounting functions. May perform project manager or application administrator functions.
Project team member	Reviews project and activity status and schedules. May require read-only access to specific project components.
Vice president, executive, or high-level manager	Inquiry of overall project status such as total revenue and gross margin.

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Process Flow

To implement row-level security in Project Costing:

1. Create project security profiles on the Security Profile page.
2. Create project roles, and associate them with security profiles, on the Project Role page.
3. Define the type of security to be implemented, based on the needs of the enterprise, on the Security Options page:
    - Team-based security.
    - User, tree-based security.
    - Permission list, tree-based security.
    - Permission list, list-based security.
4. Implement the type of security selected.

Understanding ChartField Security

PeopleSoft ChartField security provides a flexible, rule-based approach to administer security at a data level. ChartField security is supported in PeopleSoft Project Costing and across other PeopleSoft Financial and Supply Chain Management (FSCM) applications. The ChartField security feature prevents unauthorized employees and contractors from viewing and editing sensitive financial data by restricting access to data stored with specific ChartField values.

The primary features for ChartField security are:

- Enforce security rules by user, role, or permission list.
- Enable ChartField security for all products or selectively by product.
- Enable or disable ChartField security selectively by component.
- Define rules to accommodate end-user areas of responsibility.
- Refine access rules by product feature or component.
- Support super user access to minimize setup.
- Define components as exceptions to override security rules.

Project Costing excludes the Project ID field from ChartField Security because it considers the Project ID to be a Project Costing identifier field and not a project ChartField. Therefore, if the Project ID field is included in ChartField Security, Project Costing behaves as though the Project ID field is not part of ChartField Security.

For more information about securing ChartFields:

See Application Fundamentals: Securing ChartFields for PeopleSoft Project Costing.

Defining Project Security

To set up project row-level security, use the following components:

- Security Profile (PROJ_SEC_PROFILE).
- Row Level Security Options (SECURITY_OPTIONS)
- Project Security (SEC_PROJECT).

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Pages Used to Define Project Security

Page Name	Definition Name	Usage
Security Profile Page	PROJ_SEC_PROFILE	Create project security profiles.
Security Options	SECURITY_OPTIONS	Define the type of security to implement. See Defining Team-Based Security
Project Security	SEC_PROJLST_OPR	Assign a user to a role/security profile for each project when Project Costing is not installed. This page is read-only when Project Costing is installed and you implement team-based security. See Defining Team-Based Security
Project Security	SEC_PROJECT_OPR	Define tree-based security for a specific user. See, Defining User, Tree-Based Security.
Project Security	SEC_PROJLST_CLS	Specify projects and corresponding roles/security profiles for which access is defined by a permission list. See Defining Permission List, List-Based Security.
Project Security	SEC_PROJECT_CLS	Define security based on a permission list for roles/ security profiles that are assigned to projects belonging to the same tree. See Defining Permission List, Tree-Based Security.

Security Profile Page

Use the Security Profile page (PROJ_SEC_PROFILE) to create project security profiles.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Security Profiles**

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

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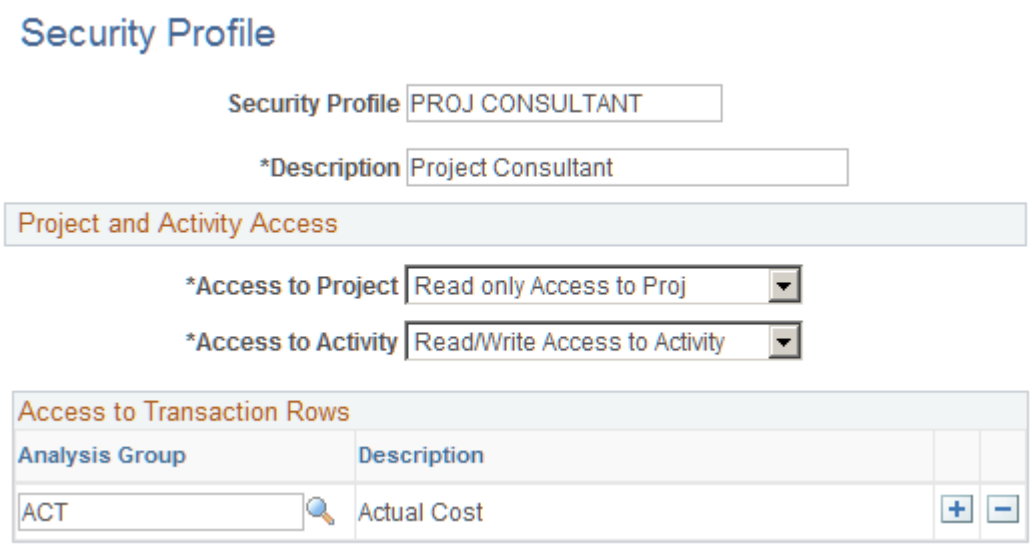

Field or Control	Description
Security Profile and **Description**	Enter a security profile name and description. If you create a unique security profile for each project role, you can enter a security profile name that matches the project role name. If you create a security profile to associate with multiple roles, you can enter a generic security profile name.
Access to Project and **Access to Activity**	Select an access type. Available options are *No Access, Read only,* or *Read/Write.*
Analysis Group	Enter one or more analysis groups to grant the security profile access to transactions with analysis types that belong to these groups. Granting access to transactions automatically permits read and write permissions, and the ability to add and delete rows, unless the analysis type is defined as a secured analysis type.

Secured Analysis Types

You can control the transactions that users can modify by setting up secured analysis types. Transaction rows for secured analysis types appear as read-only on the Transaction List page. Users cannot add or delete transaction rows that belong to secured analysis types, unless the page is opened in the Correct History mode, in which case editing is allowed.

To secure analysis types:

1. Associate the analysis types that you want to secure with a single analysis group.
2. Enter the analysis group in the Secured Analysis Types group box on the Installation Options - Project Costing page.

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> **Note**
>
> Users with access to the Transaction List page in Correct History mode can modify transactions with secured analysis types.

Related Topics

- Application Fundamentals: Installation Options - Project Costing Page

Defining Team-Based Security

Use the Security Options page (SECURITY_OPTIONS) to define the type of security to implement.

Navigation:

Setup Financials/Supply Chain, and then **Security**, and then **Security Options**, and then **Security Options**

To implement team-based security:

1. Access the Security Options page
2. Select **User ID Level Security** in the **Type of Security** group box.
3. Select **Project** in the **Secured Fields** group box.
4. Select *Use list* in the **Proj Security Type** (project security type) field.
5. Save the page.

If Project Costing is installed the system grants security access to projects based on the project team. Use the Project Security page to view a list of all projects for which the user is a team member.

Use the Project Security page (SEC_PROJLST_OPR) to assign a user to a role/security profile for each project when Project Costing is not installed. This page is read-only when Project Costing is installed and you have implement team-based security.

Navigation:

Setup Financials/Supply Chain, and then **Security**, and then **Setup Project Security**

If Project Costing is not installed:

1. Access the Project Security page for a user.
2. Enter the business unit and project ID of the projects to which you are providing access.
3. Select the security profile for the selected user in this project.
4. Save the page.

Defining User, Tree-Based Security

To implement user, tree-based security:

Use the Security Options page (SECURITY_OPTIONS) to define the type of security to implement.

Navigation:

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Setup Financials/Supply Chain, and then **Security**, and then **Security Options**, and then **Security Options**

1. Access the Security Options page.
2. Select **User ID Level Security** in the **Type of Security** group box.
3. Select **Project** in the **Secured Fields** group box.
4. Select *Use tree* in the **Proj Security Type** field.
5. Save the page.

Use the Project Security page (SEC_PROJECT_OPR) to define tree-based security for a specific user.

Navigation:

Setup Financials/Supply Chain, and then **Security**, and then **Setup Project Security**

1. Enter the tree business unit, tree name, and tree effective date for the tree that you are securing.
2. Select the project ID (tree node) in the **User Role in Projects** grid to define the security for the selected user.
3. Select the project role of the selected user in this project.
4. Save the page.

Defining Permission List, List-Based Security

To implement permission list, list-based security:

Use the Security Options page (SECURITY_OPTIONS) to define the type of security to implement.

Navigation:

Setup Financials/Supply Chain, and then **Security**, and then **Security Options**, and then **Security Options**

1. Access the Security Options page
2. Select **Permission List Level Security** from the **Type of Security** group box.
3. Select **Project** in the **Secured Fields** group box.
4. Select *Use list* in the **Proj Security Type** field.
5. Save the page.

Use the Project Security page (SEC_PROJLST_CLS) to specify projects and corresponding roles/security profiles for which access is defined by a permission list and roles/security profiles that are assigned to projects belonging to the same tree.

Navigation:

Setup Financials/Supply Chain, and then **Security**, and then **Setup Project Security**

1. For users who have access to the selected permission list, select the business unit and project ID to which you are providing access.
2. Select the project role for the permission list in the selected project.
3. Save the page.

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> **Note**
>
> Permission list, list-based security can be defined from either the Project Security page or the Security by Permission List page that are accessible from the Project General component when permission list, list based security has been implemented. On the Project Security page, define security to multiple projects based on a permission list. On the General Information - Security by Permission List page, define security for a single project. Typically, this is done by a project manager or administrator who has access to the Project General component. The General Information - Security by Permission List page is visible only if the Security Options page is set up for permission list, list-based security, and only if Project Costing is installed.

Defining Permission List, Tree-Based Security

To implement permission list, tree-based security:

1. Access the Security Options page **(Setup Financials/Supply Chain**, and then **Security**, and then **Security Options**, and then **Security Options).**
2. Select **Permission List Level Security** from the **Type of Security** group box.
3. In the **Secured Fields** group box, check **Project.**
4. Select *Use tree* in the **Proj Security Type** field.
5. Save the page.
6. Access the Project Security page for the permission list for which you are defining security **(Setup Financials/Supply Chain**, and then **Security**, and then **Setup Project Security)**
7. Enter the tree business unit, tree name, and tree effective date for the tree that you are securing.
8. Select the project ID (tree node) that is being secured in the **Operator Class Role in Projects** grid.
9. Select the project role of the permission list in the selected project.
10. Save the page.

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6

Setting Up Accounting for Projects

Understanding Accounting for Projects

This topic discusses:

- Accounting for Projects feature.
- Revenue and cost sharing.
- Accounting data flow.
- Accounting for Projects setup steps.
- Organizational hierarchies.
- Project- and activity-owning organizations.
- Sharing structure.
- Accounting rules.
- Process Project Accounting process.

Accounting for Projects Feature

The Accounting for Projects feature provides a flexible method for translating transactions into entries that you can send to PeopleSoft General Ledger. Using accounting rules, the system converts transactions in Project Costing to accounting lines that the Journal Generator Application Engine process (FS_JGEN) later converts into journal entries.

You can use the Accounting for Projects feature to:

- Create project cost and revenue accounting entries from feeder systems for entries that have not been previously accounted for in journals.
- Create accounting entries between different organizational entities when transactions are generated for a project or activity by a resource from a business unit or other organizational entity that differs from the project or activity's general ledger (GL) business unit or organization.
- Specify how costs and revenue are shared among different departments and operating units, such as GL business units.

You must use the Accounting for Projects feature to generate accounting entries for project billing and transaction allocations.

Revenue and Cost Sharing

In the services industry, employees may work on projects that are outside of their own organization. In such cases, the organization that owns a project and the organization that owns the human resource (the employee), may be two separate entities. To handle these scenarios, use the organizational-sharing method of project accounting to share costs and revenue that the project or activity generates between the entities. You can set up rules and

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accounting procedures that define the internal agreement between the organization that owns the project and the organization that owns the human resource.

Once you determine the organization and standard accounting procedures, you can assess whether sharing is needed. Use this table to determine if organizational sharing is necessary:

No Organizational Sharing Needed	Organizational Sharing Needed
All project and activity charges follow the resource. Project and activity charges are not shared between the organization owning the human resource and the organization owning the project. Charge backs are not used.	Project or activity charges are shared between the organization owning the human resource and the organization owning the project or activity, either as a rule or on a case-by-case basis.
All charges follow the project, and the accounting for these charges are simple and require little time to maintain.	It is preferable to have a centralized location for assigning a project to an organization. This organization then owns the project.
Accounting for revenue is fairly simple. All transactions of a similar type use the same revenue account.	The organization has complex revenue accounting requirements.
Reporting and visibility needs are simple. Revenue and costs are analyzed by the resource organization, or the project or activity organization, but not by both.	Reporting and visibility needs are complex. Multidimensional visibility of revenue, costs, and expenses are needed for the owners of the projects, activities, and resources. Although revenue follows the resource, the accounting practices require that revenue be moved in and out of the project organization (or vice versa) for the purpose of visibility. Revenue and costs are booked to different accounts based on the relationship between the employee and the project.

Related Topics

- Understanding Integration with PeopleSoft Contracts and PeopleSoft Billing
  PeopleSoft Project Costing works with PeopleSoft Contracts to generate project-related customer billing. This is called rate-based project billing. For rate-based billing, PeopleSoft Contracts pulls information from project transactions and populates the PeopleSoft Billing interface tables with the billing information.
- Defining the Sharing Structure
  To define the sharing structure, use these components:

Accounting Data Flow

This diagram illustrates the flow of transactions from feeder systems to PeopleSoft Project Costing, and from Project Costing to PeopleSoft Billing and PeopleSoft General Ledger:

Flow of transactions from feeder systems to Project Costing and flow of transactions from Project Costing to Billing and General Ledger.

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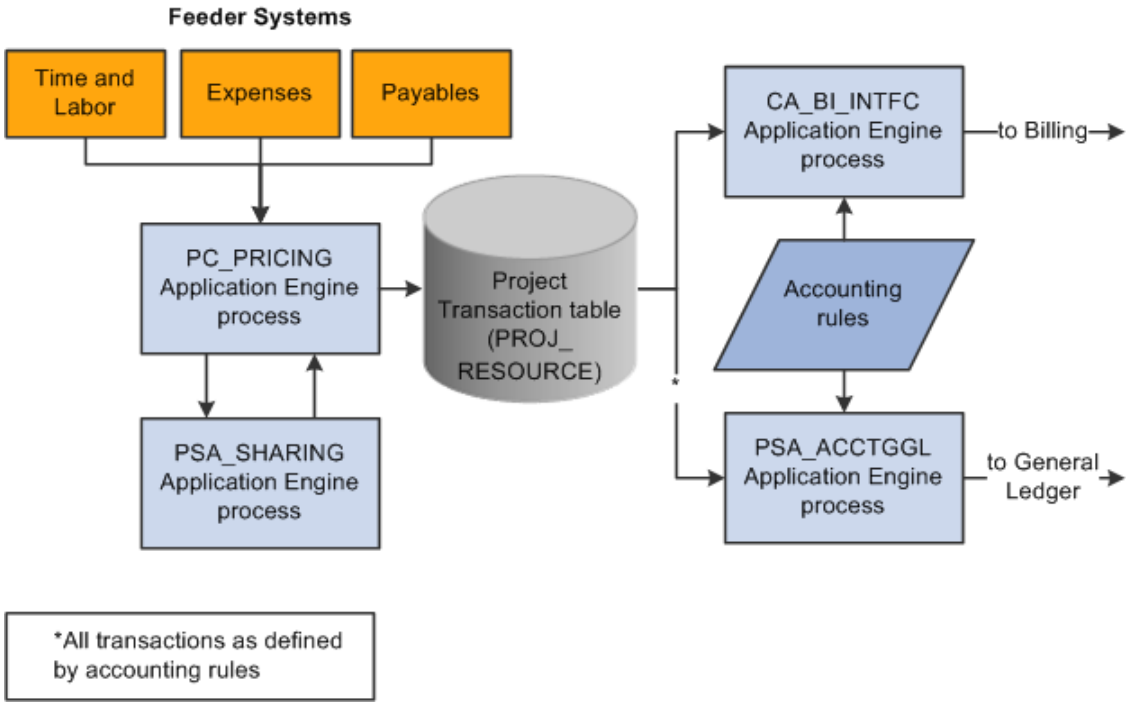

These steps illustrate the flow of transactions to and from Project Costing:

1. PeopleSoft applications such as PeopleSoft Time and Labor, Expenses, and Payables, feed data to PeopleSoft Project Costing, which triggers the Pricing Application Engine process (PC_PRICING).

   The Pricing process creates target rows in the Project Transaction table (PROJ_RESOURCE). The system uses the target rows to generate accounting and billing entries.

2. If sharing rules are defined and activated, the Pricing process calls the Sharing Application Engine process (PSA_SHARING) to search for rows that are designated for sharing.

   The Sharing process analyzes a row for sharing if the organization that owns the project or activity differs from the organization of the transaction-generating resource, and an applicable sharing rule exists.

   After identifying the applicable sharing rule, the Sharing process identifies exceptions, which follow a priority hierarchy that you establish on the Organizational Sharing Options page. If there are no exceptions, the Sharing process applies the default sharing percentage that you established for the sharing rule, and creates new rows that are based on the specified sharing rules and options.

   Source transaction rows and target transaction rows are eligible for the Sharing process. Projects and activities that are associated with contracts that have a *Government* classification *are not* eligible for the Sharing process.

Important

The Sharing process analyzes transactions only if the Billing Distribution Status field (BI_DISTRIB_STATUS) value for the row is *P* (priced), or the Revenue Distribution Status field (REV_DISTRIB_STATUS) value is *C* (created), or the Cost Distribution Status field (CST_DISTRIB_STATUS) value is *C.*

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3. The Process Project Accounting Application Engine process (PSA_ACCTGGL) selects previously undistributed rows in the Project Transaction table and matches them to the appropriate accounting rules that are set up to write journal entries into the Accounting Line for Contracts and Projects table (CA_ACCTG_LN_PC).
4. The Journal Generator process creates the journal in PeopleSoft General Ledger.

   Additionally, the system uses accounting rules to send data to the Contracts Billing Interface Application Engine process (CA_BI_INTFC) to forward to PeopleSoft Billing. The accounting rules for as-incurred billing plans, not the accounting distribution that is defined in contract lines, determine the unbilled accounts receivable (UAR) accounting distribution.

You must define accounting rules to generate any accounting entries from Project Costing, even if you do not use an organizational hierarchy or sharing rules.

Related Topics

- PeopleSoft Contracts: Understanding Billing in Contracts
- PeopleSoft Contracts: Defining Billing Plans
- PeopleSoft Contracts: Assigning Contract Lines to Billing Plans

Accounting for Projects Setup Steps

You can set up project accounting in one of three ways based on your need to track project costs and revenue. This table lists the purpose and setup requirements for each method:

Type of Accounting	Purpose	Setup Required
Straight	Use when transactions always follow the resource; for example, when transactions that a resource creates are charged to that resource's organizational entity.	Define accounting rules. See Accounting Rules Page.
Transorganizational	Use to charge transactions to an organizational entity that differs from that of the resource; for example, when an employee is temporarily assigned to another office, but the company wants to charge the employee's expenses to the employee's original office.	1. Enable organizations on the Installation Options - Project Costing page. See Application Fundamentals: Installation Options - Project Costing Page. 2. Define the organizational hierarchy. See Organization Hierarchy Page. 3. Define either the project-owning organization or the project activity-owning organization. See Defining Project- and Activity-Owning Organizations. 4. Define accounting rules. See Accounting Rules Page.

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Type of Accounting	Purpose	Setup Required
Organizational sharing	Use to share costs and revenue between a resource's organization and the organization that owns the project or activity. **Note:** Contracts with a contract classification of *Government* are not eligible for organizational sharing.	1. Enable organizations on the Installation Options - Project Costing page. See Application Fundamentals: Installation Options - Project Costing Page. 2. Enable costs and revenue sharing on the Installation Options - Project Costing page. 3. Define the organizational hierarchy. See Organization Hierarchy Page. 4. Define organizational sharing options. See Organizational Sharing Options Page. 5. Define sharing rules (source criteria and target definitions). See Organizational Sharing Rules Page, Organizational Sharing Rules - Target Page. 6. (Optional) Define sharing exceptions. See Defining Sharing Exceptions. 7. Define either the project-owning organization or the project activity-owning organizations. See Defining Project- and Activity-Owning Organizations. 8. Define accounting rules. Complete this step if you want to send transactions to GL. See Accounting Rules Page.

Note

In situations that require transorganizational or organizational-sharing accounting, the resource that generates the transaction is typically an employee or consultant. You can, however, use these methods to account for transactions that are generated by resources other than human resources.

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Related Topics

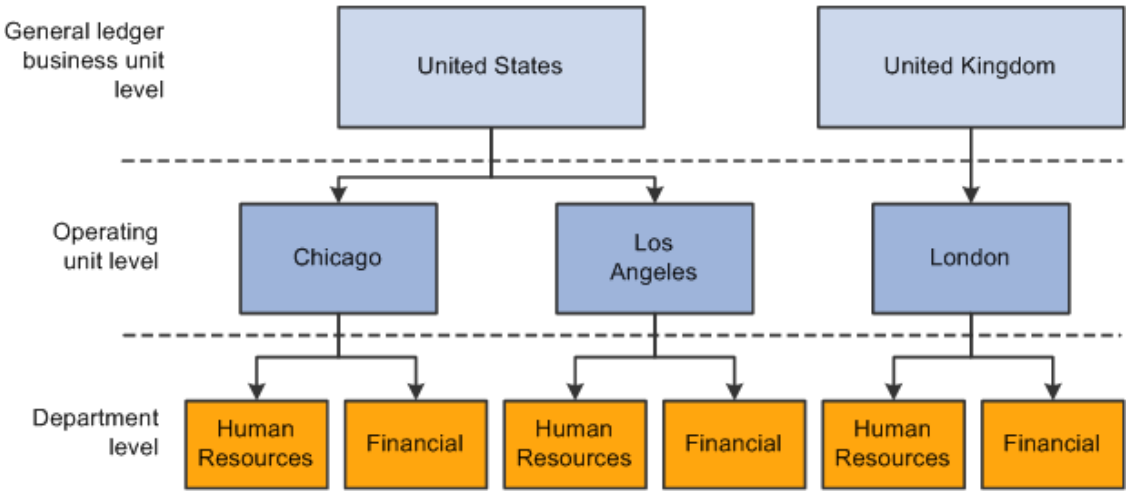
- Understanding Integration with PeopleSoft General Ledger
  PeopleSoft Project Costing has a built-in integration with PeopleSoft General Ledger by way of the Journal Generator Application Engine process (FS_JGEN). The Journal Generator process transforms accounting entries into journal entries that you can post to PeopleSoft General Ledger.
- Understanding Data Flows
  Most information that is stored in PeopleSoft Project Costing originates from feeder systems such as other PeopleSoft applications and third-party applications. Feeder system data is posted to PeopleSoft General Ledger and passed to PeopleSoft Project Costing through Application Engine processes.
- Understanding Journal Line Retrieval from General Ledger
  You can create project transactions from journal entries that are posted to PeopleSoft General Ledger by using the General Ledger to Project Costing Application Engine process (PC_GL_TO_PC). The journal entries must be in a posted status and must include all required project ChartFields.
- Processing Single-Sided Transactions
- Creating Double-Sided Transactions
  Double-sided transactions are created in PeopleSoft Project Costing when you:
- Retrieving Posted Journals for PeopleSoft Project Costing

Organizational Hierarchies

The first step in setting up transorganizational accounting or organizational-sharing accounting is to define the organizational hierarchy, which you use to determine which rules apply to a given situation. The organization can be as simple as a GL business unit (which is the minimum required), or it can be broken down further into four additional groups and subgroups using ChartFields to designate each organizational entity. This enables you to apply different rules (for accounting across or sharing between entities) to organizational entities depending on their size.

This diagram shows an example of an organization that is defined first by GL business unit, and then by operating unit and department:

Examples of a three tiered hierarchy. General ledger business unit at the top, operating unit in the middle, and departments at the bottom.



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The GL business unit is always first in the organizational hierarchy when you apply accounting rules to a human resource who is working on a project or activity in another part of the company. A human resource from one GL business unit working in another GL business unit always follows interbusiness unit rules, regardless of the departments and operating units that are involved.

The human resources system defines which organization owns a particular human resource. The system automatically attaches both the GL business unit and the department to a human resource. You must populate other ChartFields that you include in an organizational definition in transactions that are sent to the Project Transaction table.

Project- and Activity-Owning Organizations

You can configure organizational sharing at the project or activity level.

If you specify an owning organization at the activity level, the Sharing process determines whether to create sharing rows based on this criteria:

- If a transaction enters Project Costing with an owning organization that differs from the ChartField values entered on the Activity Organization page, the system creates sharing rows based on the defined sharing rules.
- If a transaction enters Project Costing that matches the ChartField values entered on the Activity Organization page, the system does not create sharing rows.
- If an owning organization exists at the activity level, the system disregards the project-level owning organization even if no transactions match the ChartField values entered on the Activity Organization page.

If no owning organization exists at the activity level, the system uses the project-level owning organization to determine whether to create sharing rows based on this criteria:

- If a transaction enters Project Costing that differs from ChartField values on the project Organization page, the system creates sharing rows based on the defined sharing rules.
- If a transaction enters Project Costing that matches the ChartField values on the project Organization page, the system does not create sharing rows.

If no owning organization exists at the activity level or the project level, the system does not create sharing rows.

Sharing Structure

The sharing structure consists of sharing options, rates, and exceptions.

Sharing Options

Organizational sharing options define which elements of an organization trigger charge backs. The organizational sharing options that are available for selection are based on the organizational hierarchy that you set up at the system level.

For example, assume that you set up an organizational hierarchy that consists of multiple levels. Level 1 is required and is always the GL Business Unit ChartField *BUSINESS_UNIT_GL.* Levels 2 through 5 are optional. In this example, level 2 is the *DEPTID* ChartField. As a result, on the Organizational Sharing Options page you can select the **GL Business Unit** and **Department,** or just the GL Business Unit, to trigger organizational sharing. If you select both fields on the Organizational Sharing Options page, the system triggers organizational sharing if a project activity's owning organization business unit or department differ from that of the transaction. If the activity does not have an owning

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organization, the system triggers organizational sharing if the project's owning organization business unit or department differ from that of the transaction.

Sharing Exceptions

You can set up exceptions based on employees and employee attributes, project teams, projects and project attributes, and organizations. Use the Organizational Sharing Options page to establish the exception type priorities.

The system stops processing when it finds the first valid exception. For example, assume that you set up three exception types with priority 1, 2, and 3 on the Organizational Sharing Options page. If the system encounters an exception while processing the first priority exception type, it stops immediately and does not proceed to the subsequent exception types.

Example of Sharing Process

This section provides an example of sharing revenue between two organizations by using the Sharing process.

Assume that you want the project activity-owning organization to share half of the revenue generated for an activity with the resource-owning organization. When expense rows, which have an ACT (Actual Cost) analysis type, and labor costs, which have a PAY (Time and Labor Actual) analysis type, enter Project Costing from feeder systems, the rate set for this activity instructs the Pricing Application Engine process (PC_PRICING) to create BIL (Billable Amount) rows. For each BIL row that contains a different GL business unit than the owning organization, you want the Sharing process to create two new rows—one with an analysis type of SHR (Shared Revenue) for 50 percent of the billed amount, and another row for 100 percent of the billed amount with an analysis type of OFA (Offset Revenue).

After you enable organizations and sharing on the Installation Options - Project Costing page, these are the steps to set up this example:

1. On the Organizational Sharing Options page, select only the **GL Business Unit** option in the **Sharing Organization** group box.

   The organizational hierarchy is established for the system at the GL business unit and department level; however, this example evaluates only the sharing options for the GL business unit.

2. On the Organizational Sharing Options page, select the **Copy original/create discount** option in the **Process Results** group box.

3. On the Organizational Sharing Rules - Source Criteria page, specify a *BIL* analysis type as the source transaction.

4. On the Organizational Sharing Rules - Target Definition page, enter these values for the Sharing process to use to create new rows from each BIL row:

   - **Percentage:** *50*

     The Sharing process applies this percentage to the row with the discount analysis type.

   - **Target Analysis Type:** *OFA*

   - **Discount Analysis Type:** *SHR*

The Pricing process, which triggers the Sharing process, sends the resulting rows to the Project Transaction table. The following table lists the original BIL row, the new target OFA row (at 100 percent of the original BIL row), and the new discount SHR row (at 50 percent of the original BIL row):

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Analysis Type	Quantity	Unit of Measure	Source Amount	Source Currency
BIL	8	EA	1,200.00	USD
OFA	8	EA	1,200.00	USD
SHR	8	EA	600.00	USD

Accounting Rules

You define standard accounting entries, or rules for project-based transactions, based on a combination of these data elements:

- Project business unit.
- Analysis type.
- Contract.
- Project.
- Project GL business unit.
- Resource GL business unit.
- Activity.
- Other project-related ChartFields.
- Other project-related identifiers, such as project type, project transaction type, and project transaction code.
- GL ChartFields.

These rules are necessary to process any accounting from project transactions. You must enter values for the project business unit and resource GL business unit. You must also enter a value for the project GL business unit when you use transorganizational accounting. You can minimize the rules by entering a wildcard (the percent symbol) in all of the other listed fields. Alternatively, you can make the rules more specific by entering values for the listed fields.

For example, assume that a time sheet is priced and generates a billable row with a BIL analysis type and a cost row with an analysis type of CAC (Cost Sharing Actuals). These two rows (BIL and CAC) may require different accounting entries using two accounting rules—one for the BIL analysis type and one for the CAC analysis type. You can copy accounting rules to the various project business unit-and-resource GL business unit combinations that you require by clicking the **Copy Accounting Entries To** link on the Accounting Rules page and entering the new header criteria.

> **Note**
>
> If you use the Government Contracting feature that is available with PeopleSoft Contracts, and you select the **Separate Billing and Revenue** option on the Installation Options - Contracts page, transactions with a Revenue (REV) analysis type use the accounting rules that are set up for the BIL analysis type. This ensures that the system uses same UAR for all billing and revenue accounting entries that are associated with cost plus contract lines.

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Related Topics

- Understanding PeopleSoft Project Costing and Government Contracting Integration
  The Government Contracting feature enables contractors to effectively manage government contracts in accordance with governmental rules and regulations. The Government Contracting system uses project, activity, and transaction data that is stored in PeopleSoft Project Costing to calculate costs and fees for billing, and to create accounting entries for revenue recognition for rate-based products or services. Transactions that the Government Contracting feature creates, such as fees and withholding transactions, are sent back to PeopleSoft Project Costing for analysis purposes.

Process Project Accounting Process

The Process Project Accounting process selects transactions from the Project Transaction table based on accounting rules, and translates transaction amounts into the appropriate base currency that is specified for the GL business unit. If necessary, the central processor in PeopleSoft General Ledger creates interunit entries.

Use the Process Project Accounting process to apply accounting rules and generate:

- Cost entries from transactions with analysis types that belong to the Accounting Costs analysis group (PSCST).
- Revenue entries from transactions with analysis types that belong to the System Revenue analysis group (PSREV) or the GC (Government Contracting) System Revenue analysis group (PSRV2).

  Additionally, the transaction line must be linked to a contract line where the revenue plan is in a status of *Ready* or *In Progress.*
- Purchase/sold time, shared discounts, and shared revenue entries with analysis types that belong to the Sharing analysis group (PSTDR).

> **Note**
>
> The Contracts to Project Costing Application Engine process (PC_CA_TO_PC) picks up the revenue accounting rows for amount-based contract lines with associated project activities. The amount-based revenue rows in Project Costing are for project tracking and comparison purposes and are not sent to PeopleSoft Billing or PeopleSoft General Ledger.

If the transaction currency is different than the GL base currency when performing currency translations for:

- Cost transactions, the system uses the currency effective date that is specified on the transaction.
- Revenue-related transactions, the system uses either the accounting date or the transaction date as the currency effective date, based on the **Currency Conversion Date** option that is specified on the Installation Options - Contracts page.
- Billing-related transactions, the system uses the invoice date as the currency effective date.

Related Topics

- PeopleSoft Contracts: The Rate-based Revenue (Accounting Rules Engine) Process (PSA_ACCTGGL)

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- PeopleSoft Billing: Running the Currency Conversion Process (BICURCNV)

Defining Organizational Accounting Installation Options

To define organizational accounting installation options, use the Installation Options (INSTALLATION_PC) and Organization Definition (PSA_ORG_DEFN) components.

Pages Used to Define Organizational Accounting Installation Options

Page Name	Definition Name	Usage
Application Fundamentals: Installation Options - Project Costing Page	INSTALLATION_PC	Select the **Enable Organization** and **Enable Sharing** check boxes in the **Organizational Accounting** group box.
Organization Hierarchy Page	PSA_ORG_DEFN	Specify the GL ChartFields at the system level that define the organization hierarchy for the Accounting for Projects feature.

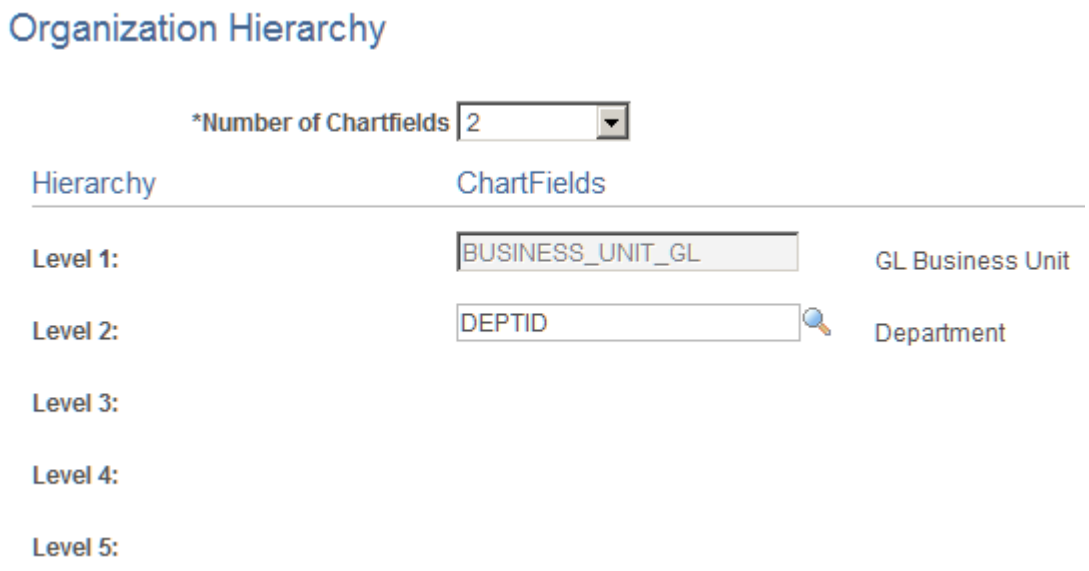
Organization Hierarchy Page

Use the Organization Hierarchy page (PSA_ORG_DEFN) to specify the GL ChartFields at the system level that define the organization hierarchy for the Accounting for Projects feature.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Org Hierarchy**

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



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Define the number of levels in your hierarchy and the ChartField that defines each level. You can use up to five ChartFields to define levels of the organization. The first level, however, is always the **GL Business Unit** field.

Defining Project- and Activity-Owning Organizations

Pages Used to Define Project- and Activity-Owning Organizations

Page Name	Definition Name	Usage
Organization Page	PSA_ORGPRJ_DEFN	Specify the owning organization for a particular project.
Activity Organization Page	PSA_ORGPRJACT_DEFN	Specify the owning organization for a particular project activity.

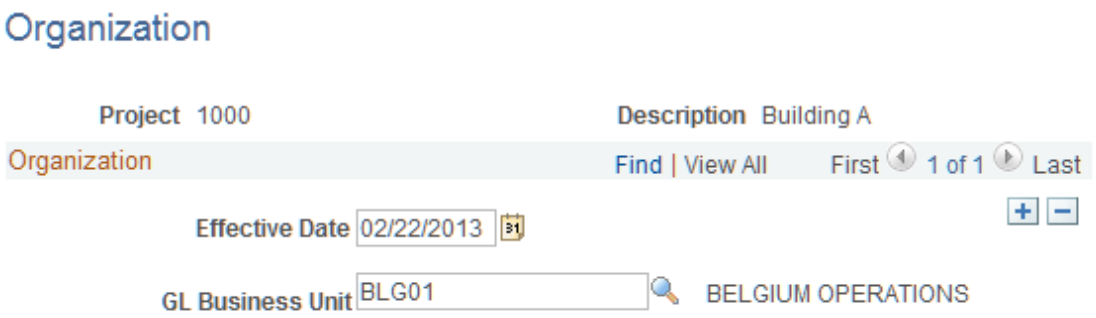
Organization Page

Use the Organization page (PSA_ORGPRJ_DEFN) to specify the owning organization for a particular project.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project Organization**

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



Define the owner organization of the project. The ChartFields that appear on this page are established on the Organization Hierarchy page.

> **Note**
>
> The system disregards this page if a transaction comes into Project Costing for a project activity that has an owning organization defined at the activity level.

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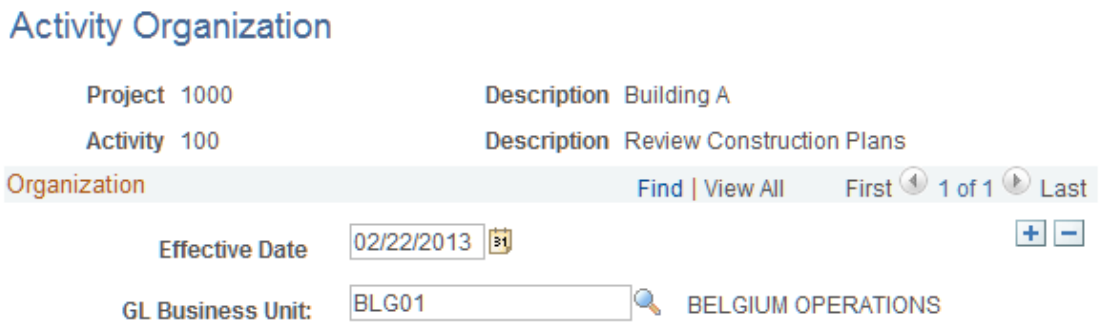
Activity Organization Page

Use the Activity Organization page (PSA_ORGPRJACT_DEFN) to specify the owning organization for a particular project activity.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity Organization**

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



Define the owner organization of the project activity. The ChartFields that appear on this page are established on the Organization Hierarchy page.

Defining Accounting Rules

To define accounting rules, use the Accounting Rules component (PSA_ACCT_SETUP). Use the PSA_ACCT_SETUP_CI component interface to load data into the tables for this component.

Page Used to Define Accounting Rules

Page Name	Definition Name	Usage
Accounting Rules Page	PSA_ACCT_SETUP	Define the accounting rules to apply to rate-based transactions that originate in Project Costing, fee-based transactions that originate in PeopleSoft Contracts, or transactions that were not accounted for in feeder systems. The system uses these rules when you run the Process Project Accounting process.

Migrating Accounting Rules

PeopleSoft Contracts Accounting Rules are used to generate billing and revenue accounting entries. You can create and test Accounting Rules in development or test databases, and then

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use the Data Migration Workbench to move them between development environments, test environments, and ultimately to your production environment.

See Application Fundamentals: Understanding the PeopleSoft Data Migration Workbench.

See PeopleSoft Contracts: Using the Data Migration Workbench for PeopleSoft Accounting Rules.

See *PeopleTools: Application Designer Lifecycle Management Guide.*

Accounting Rules Page

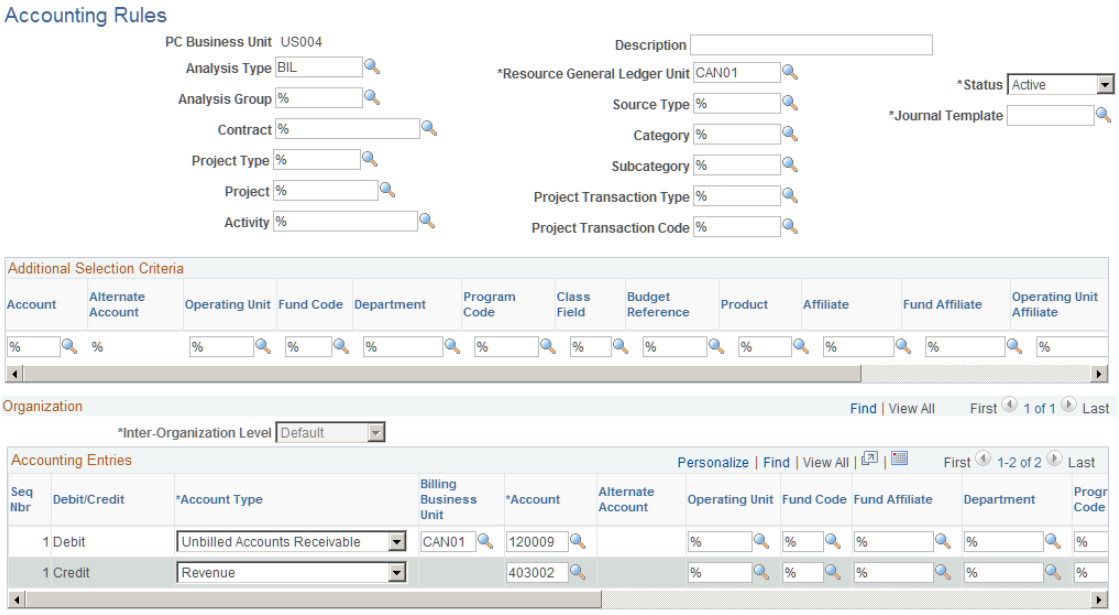
Use the Accounting Rules page (PSA_ACCT_SETUP) to define the accounting rules to apply to rate-based transactions that originate in Project Costing, fee-based transactions that originate in PeopleSoft Contracts, or transactions that were not accounted for in feeder systems.

The system uses these rules when you run the Process Project Accounting process.

Navigation:

- **Setup Financials/Supply Chain**, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Accounting Rules**, and then **Accounting Rules**
- **Customer Contracts**, and then **Create and Amend**, and then **As Incurred Acct Distribution**, and then **Accounting Rules**

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



This page is divided into three sections. In the top section, you define the criteria for incoming transactions to which the accounting rules apply. In the **Organization** section, you specify the organizational relationship for which the rules apply, and in the **Accounting Entries** section, you define the accounting transactions that the system creates.

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> **Note**
>
> On this page, you can enter a percent symbol as a wildcard, which indicates any possible value. You cannot use partial wildcards on this page, which is alphanumeric symbols in combination with the percent sign symbol.

Field or Control	Description
Project General Ledger Unit	Enter the project GL business unit, which designates the business unit to which accounting entries are charged for the project. This field appears if the **Enable Organization** option is activated on the Installation Options - Project Costing page.
Resource General Ledger Unit	Enter the GL business unit that owns the resource. You must enter a value for this field.
Analysis Type and **Analysis Group**	Enter an analysis type or analysis group. You can enter a value in the **Analysis Type** field or the **Analysis Group** field, but not both. If an accounting rule is created by entering an analysis group then all the analysis types that are part of the analysis group are eligible to be considered while generating accounting entries.
Journal Template	Enter the journal template to attach to accounting entries when they are sent to the GL system. The *CA_PC* journal template is recommended for revenue-generating, accounting rules that PeopleSoft Contracts controls.
Additional Selection Criteria	Enter ChartField values to search for general ledger ChartFields. When a new accounting rule is added, all fields in this group box are wildcard symbols (%). The **Alternate Account** field is enabled or disabled based on the **Enable Alternate Account** option on the Installation Options page and then based on the **Enable Alternate Account** option on the General Ledger Business Unit Definition page.
Copy Accounting Entries To	Click to copy the accounting entries that you specify in the **Accounting Entries** group box for use with another set of header criteria. See PeopleSoft General Ledger: Defining General Ledger Business Units.

> **Note**
>
> The Status selection validates the status for project and other fields used as criteria. You may set the accounting rule status as Active if the values selected as criteria are active. Accounting rules can be set to inactive without such validation. This allows you to inactivate a project and then inactivate the related accounting rule.

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Organization

Field or Control	Description
Inter-Organizational Level	Specify the organizational levels that the system uses to define the accounting entries that the system creates. This field is used for setting up accounting rules for transorganizational or organizational-sharing accounting. This field is available if you select **Enable Organization** on the Installation Options - Project Costing page and define the organizational hierarchy. As an example, if you define the organization to include GL business unit, operating unit, and department, in that order, then the field values are: *Level 1* (GL business unit): Use accounting entries that are specified under this inter-organizational level when an employee is in a different GL business unit than the project's GL unit. *Level 2* (operating unit): Use accounting entries that are specified under this inter-organizational level when an employee from one operating unit works on a project or activity that is owned by another operating unit, and both operating units belong to the same GL business unit. *Level 3* (department): Use accounting entries that are specified under this inter-organizational level when an employee from one department works in another department, and the GL business unit is the same as the operating unit. *Default:* Use when the resource and project or activity organizations are the same, or when you do not need to distinguish organizational levels from one another. After analyzing the relationship between the resource organization and the project or activity organization, the Process Project Accounting process looks for a rule that is established for that relationship. If none exists, it uses the default rule. If no default rule exists, it does not generate any accounting entry lines. For example, when an employee working in another department within the same GL business unit submits an expense transaction, the system checks to see if there is an accounting rule at the department level. If no rule exists, the system checks to see if a default rule exists. A default accounting rule should always be in place for inter-organizational level accounting entries. To set up accounting rules for straight accounting, deselect the **Enable Organization** field on the Installation Options - Project Costing page to disable the **Inter-Organization**

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Field or Control	Description
	Level field, which tells the system to use the default Inter-Organization Level entries. See Organization Hierarchy Page. See Revenue and Cost Sharing.

Accounting Entries

Use this grid to define the accounting debits and credits to create for specified project transactions. There must be an equal number of debits and credits. When defining accounting rules for billable activity, you must specify one UAR accounting distribution. This accounting distribution is stamped on the row when it is sent to PeopleSoft Billing. If you do not establish a UAR distribution, the system does not send the row to Billing.

Field or Control	Description
Seq Nbr (sequence number)	Displays the sequence in which the system applies these accounting entries. The sequence number groups the debit and credit together and is used to determine if interunit entries should be created. **Note:** Do not specify interunit entries on the Accounting Rules page. This results in double entries.
Debit/Credit	Displays whether this accounting line is a debit or a credit.
Account Type	Select the type of accounting entry. **Note:** The system sends unbilled accounts receivable to PeopleSoft Billing.
Billing Business Unit	This field appears only if the account type is *Unbilled Accounts Receivable.* Enter the same business unit that you entered in the **Resource General Ledger Unit** field to ensure that the receivables accounting entries are booked to the same GL business unit as the unbilled receivables account. You must set up rows with analysis types of BRT (Billing Retainage), RRT (Released Billing Retainage), DEF (Deferred Amount), and OLT (Over Limit Amount) for these types of processing. These rows are not accounted for in the Process Project Accounting process, but they require a UAR accounting distribution to be sent to PeopleSoft Billing.

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> **Note**
>
> Prepaid utilization rows—rows with an analysis type of UAJ (Prepaid Utilization Adjustment) and UTL (Prepaid Utilization for Billing)—are costs that are prepaid by the customer and used over a period of time. Prepaid utilization rows are not handled in the accounting rules setup. PeopleSoft Contracts generates UTL rows and sends them to the PeopleSoft Billing system when a prepayment is used. PeopleSoft Billing generates UAJ rows. The Process Project Accounting process handles the accounting for utilization rows separately. Contract liability is debited from the prepaid accounting setup, and UAR is credited. The UAR is populated on the UTL and UAJ rows from the BIL rows that are sent to PeopleSoft Billing.

Field or Control	Description
Account	Enter an account number or enter a percent symbol as a wildcard. A percent symbol indicates any possible value. When entering a percent symbol, the system generates accounting entries with the account that is used on the transaction. Therefore, it is possible to use either the account on the accounting rule or the account on the transaction to generate accounting entries. If both debit and credit ChartField values on this page have a percent symbol, then both entries go to the same account, which is entered on the transaction. If a ChartField value is a percent symbol on the Accounting Rules page and the account is not entered on the transaction, then an error message is created in the Message Log and the transaction is placed on hold. **Note:** Additional ChartField values on this page operate in the same way .
Organization to Book	Select either *Resource* or *Project* to specify which business unit to book the accounting line. This field appears on the page if the **Enable Organization** option was selected on the Installation Options - Project Costing page.
Project Value	Select an option that determines if the project ID appears on the accounting entry when it is created. The options for this required field are: • *None:* No project ID will appear on the accounting entry in the Accounting Line for Contracts and Projects table. • *Source:* The project ID listed in the source transaction is used for the accounting entry in the Accounting Line for Contracts and Projects table.

Related Topics

- PeopleSoft Contracts: Understanding Prepaid Amounts

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Defining the Sharing Structure

To define the sharing structure, use these components:

- Organizational Sharing Options (PSA_SHARING)
- Sharing Rules (PSA_SHARE_RULES)
- Specific Employee Exceptions (PSA_EXCPT_EE1)
- Employee Attribute Exceptions (PSA_EXCPT_EE2)
- Project Team Exceptions (PSA_EXCPT_TEAM)
- Specific Project Exceptions (PSA_EXCPT_PROJ1)
- Project Attribute Exceptions (PSA_EXCPT_PROJ2)
- Organizational Exceptions (PSA_EXCPT_ORG)

Pages Used to Define the Sharing Structure

Page Name	Definition Name	Usage
Organizational Sharing Options Page	PSA_SHARE_OPTN	Defines which elements of an organization trigger charge backs.
Organizational Sharing Rules Page	PSA_SHARE_RULES	Create or view the organizational sharing rules source criteria.
Organizational Sharing Rules - Target Page	PSA_SHARE_RULES_LN	Define percentage and target rows for the selected sharing rule.
Specific Employee Exceptions Page	PSA_EXCPT_EE1	Create exceptions to sharing rules for employees. See Defining Sharing Exceptions
Employee Attribute Exceptions Page	PSA_EXCPT_EE2	Create exceptions to sharing rules for a particular type or classification of employee. See Defining Sharing Exceptions
Project Team Member Exceptions Page	PSA_EXCPT_TEAM	Create exceptions to sharing rules for a project team member. See Defining Sharing Exceptions
Specific Project Exceptions Page	PSA_EXCPT_PROJ1	Create exceptions to the sharing rules of a specific project. See Defining Sharing Exceptions
Project Attribute Exceptions Page	PSA_EXCPT_PROJ2	Create exceptions to sharing rules based on project attributes. See Defining Sharing Exceptions

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Page Name	Definition Name	Usage
Organization Exceptions Page	PSA_EXCPT_ORG	Create exceptions to sharing rules based on the organization or a relationship between organizations. See Defining Sharing Exceptions

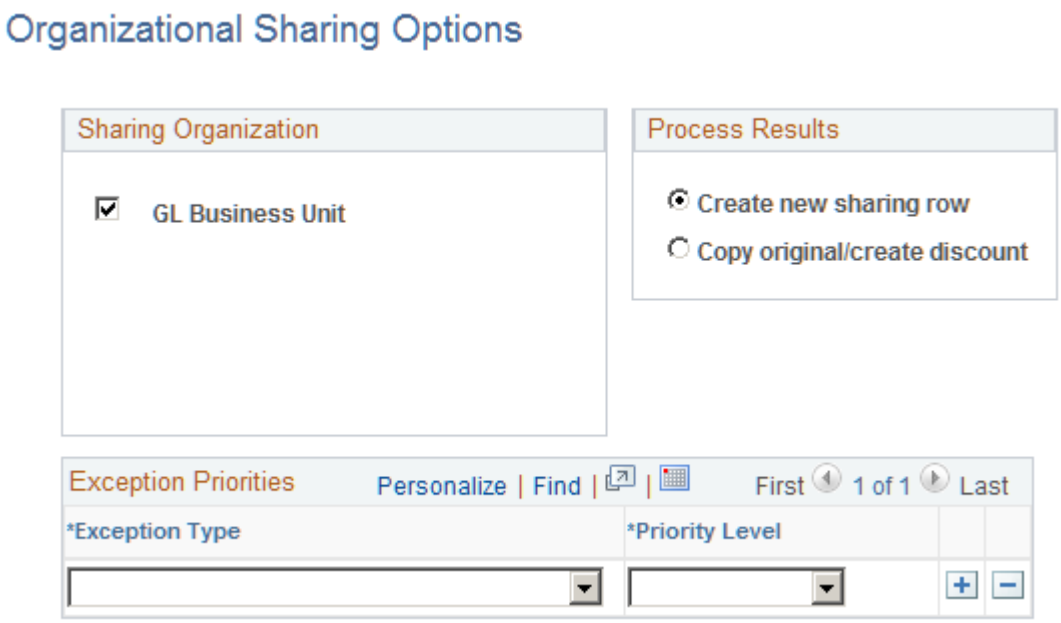
Organizational Sharing Options Page

Use the Organizational Sharing Options page (PSA_SHARE_OPTN) to defines which elements of an organization trigger charge backs.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **Setup PC Sharing Options**

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



As a prerequisite, you must enable sharing option on the Installation Options - Project Costing page and define organizational hierarchies.

Sharing Organization

Select the entities that are involved in organizational sharing. Only entities that you select on the Organization Hierarchy page are available.

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Process Results

Field or Control	Description
Create new sharing row	Click to create a new row and apply the sharing percentage to the original amount.
Copy original/create discount	Click to create two new transaction rows, one with the full amount and one with the discounted credit.

For example, assume that two organizations share at a rate of 80 percent. When sharing a revenue transaction of 100 USD, based on the option that you choose the system will create a row of 80 USD or create two rows—one for USD 100 and the other for USD 20.

Exception Priorities

Field or Control	Description
Exception Type	Specify exceptions to evaluate for organizational sharing. Valid exception types are: *Employee Attributes* *Organizational Relationships* *Project Attributes* *Specific Employees* *Specific Project Team Members* *Specific Projects* Each exception is defined in separate corresponding exception pages.
Priority Level	Rank the priority of each exception type. The system uses this value in situations when two or more exception types apply to a transaction. Valid priority levels are *1* through *6*, with *1* being the highest priority.

> **Note**
>
> If more than one organization exception matches a given resource transaction, organization exceptions are weighted according to the hierarchy identified on the Define an Organization page. An organization ChartField with a hierarchy of 4 on the Define an Organization page is applied the highest weight for an organization exception. Therefore, an organization exception that specifies all four ChartFields for the resource-owning organization has higher weighting and is applied to sharing transactions before an organization exception using only two ChartFields.

Organizational Sharing Rules Page

Use the Organizational Sharing Rules page (PSA_SHARE_RULES) to create or view the organizational sharing rules source criteria.

Navigation:

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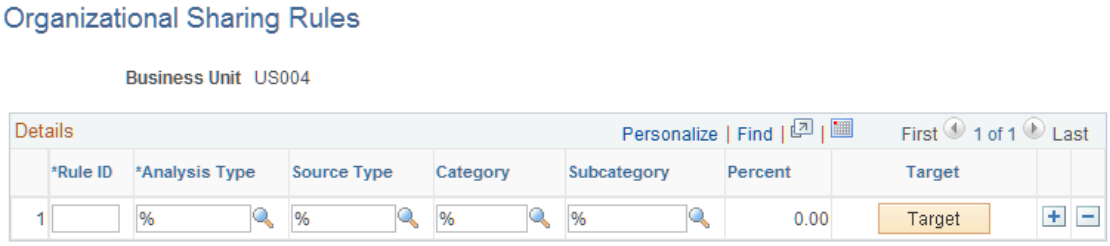
Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **Setup PC Sharing Rules**

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



Field or Control	Description
Analysis Type	Select the analysis type for transactions that the system uses to determine source criteria.
Source Type	Select the broadest category of transaction source definitions.
Category	Select a category to further define the source type.
SubCategory	Select a subcategory to further define the category.
Percent	Displays the percentage being shared according to this rule. You define this field on the Organizational Sharing Rules - Target Definition page.
Target	Click to access the Organizational Sharing Rules - Target Definition page to define the percentage and target rows for this rule.

Organizational Sharing Rules - Target Page

Use the Organizational Sharing Rules - Target page (PSA_SHARE_RULES_LN) to define percentage and target rows for the selected sharing rule.

Navigation:

Click **Target** on the Organizational Sharing Rules page.

This example illustrates the fields and controls on the Organizational Sharing Rules - Target page. You can find definitions for the fields and controls later on this page.

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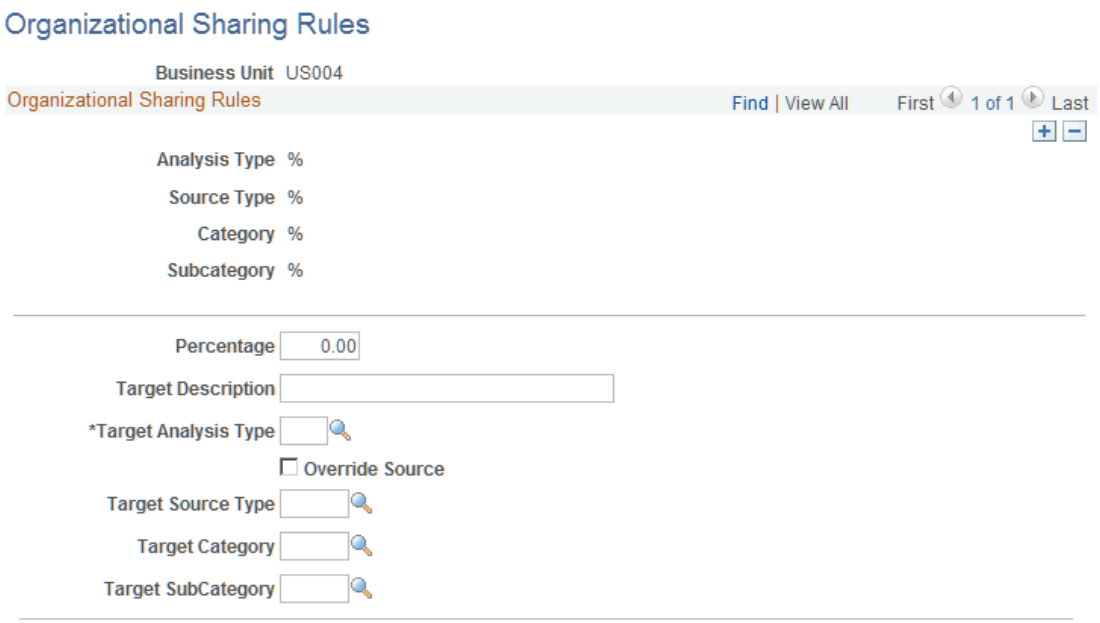

Field or Control	Description
Percentage	Enter the percentage of the transaction amount to be shared.
Target Analysis Type	Enter the analysis type for the new transaction row being created.
Override Source	Select the check box to override the values for the source type, category, and subcategory on the target row with the values in the **Source Type, Category,** and **SubCategory** ChartFields on this page. Select the check box and leave the **Source Type, Category,** and **SubCategory** ChartFields blank for the fields to appear blank in the target row. Deselect the check box for the target row to inherit the field values from the original transaction.

If you selected *Copy original/create discount* on the Organizational Sharing Options page, a second section appears on this page. Specify the description, analysis type, resource type, category, and subcategory for the discount row.

Defining Sharing Exceptions

Use these pages to define sharing exceptions:

Use the Specific Employee Exceptions page (PSA_EXCPT_EE1) to create exceptions to sharing rules for employees.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **Setup PC Share Employee Excptn**, and then **Specific Employee Exceptions**

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Use the Employee Attribute Exceptions page (PSA_EXCPT_EE2) to create exceptions to sharing rules for a particular type or classification of employee.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **PC Share Employee Attributes**

Use the Project Team Member Exceptions page (PSA_EXCPT_TEAM) to create exceptions to sharing rules for a project team member.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **Setup Proj Sharing Team Excptn**, and then **Project Team Member Exceptions**

Use the Specific Project Exceptions page (PSA_EXCPT_PROJ1) to create exceptions to the sharing rules of a specific project.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **Setup PC Sharing Proj Excptn**, and then **Specific Project Exceptions**

Use the Project Attribute Exceptions page (PSA_EXCPT_PROJ2) to create exceptions to sharing rules based on project attributes.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **PC Share Attribute Exceptions**

Use the Organization Exceptions page (PSA_EXCPT_ORG) to create exceptions to sharing rules based on the organization or a relationship between organizations.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Sharing Structure**, and then **Setup PC Sharing Org Exception**

Sharing exceptions enable you to set your target definition to a specific employee, employee attribute, project team, project, project attribute, or organization.

As a prerequisite, you must first set up rates and define your exception priorities.

Related Topics

- Defining the Sharing Structure
  To define the sharing structure, use these components:
- Organization Hierarchy Page
  Use the Organization Hierarchy page (PSA_ORG_DEFN) to specify the GL ChartFields at the system level that define the organization hierarchy for the Accounting for Projects feature.

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Processing Transactions Using Accounting Rules

Page Used to Process Transactions Using Accounting Rules

Page Name	Definition Name	Usage
Process Project Accounting Page	RUN_PSA_ACCTGGL	Run the Process Project Accounting process to pull rate-based transactions from Project Costing and create accounting entries.

Process Project Accounting Page

Use the Process Project Accounting page (RUN_PSA_ACCTGGL) to run the Process Project Accounting process to pull rate-based transactions from Project Costing and create accounting entries. Run control parameters specified in the Contract Options section are compared with the corresponding values on the contract for processing transactions.

Navigation:

Project Costing, and then **Accounting**, and then **Process Project Accounting**, and then **Process Project Accounting**

This example illustrates the fields and controls on the Process Project Accounting page.

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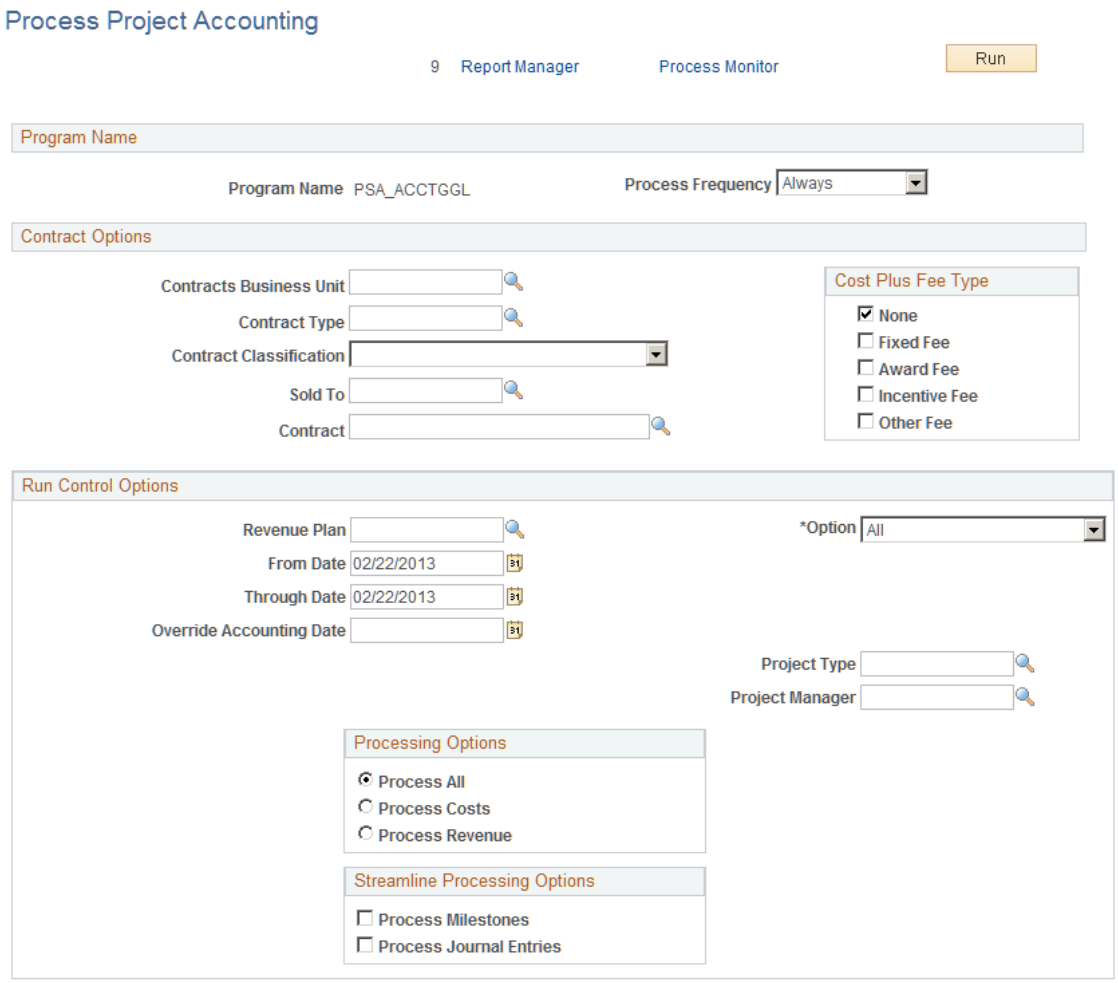

Field or Control	Description
Process Frequency	Select how often you want the process to run.
Contracts Business Unit	Enter a contract business unit to run this process for contracts in a specific business unit. Leave the field blank to run the process for all business units.
Sold To	Enter a sold-to customer for whom to run this process, or leave the field blank to include all sold-to customers that meet the run control criteria.
Contract	Enter a contract number on which to run this process, or leave this field blank to include all contracts that meet the run control criteria.

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Field or Control	Description
Contract Classification	Select the classification of the contracts that you want to process. Options are: *Internal* *Standard* *Federal Reimbursement Agreement:* This classification is available if the **Federal Reimbursable Agreements** option is enabled in the **Other Installed Options** group box on the Installation Options - Contracts page. *Government:* If you select this classification, the Process Project Accounting process triggers the Fee Processing Application Engine process (CA_FEE_PRCS) to process contract lines for the fee type that you select in the **Cost Plus Fee Type** group box. Leave the field blank to process all classifications that meet the run control criteria. See PeopleSoft Contracts: Contract Classifications.
Cost Plus Fee Type	Select the fee type of the contract lines that you want to process. Options are: *None* *Fixed Fee* *Award Fee* *Incentive Fee* *Other Fee* Leave all check boxes deselected to process all fee types. See PeopleSoft Contracts for Government Contracting: Contracts Definition - Fee Definition Page.
Revenue Plan	Enter a revenue recognition plan on which to run this process. Leave the field blank to process all revenue recognition plans.
From Date and **Through Date**	Enter the range of accounting dates to process. The system selects rows in the Project Transaction table with accounting dates that fall on or within these dates.
Override Accounting Date	Enter an override accounting date to have the system stamp the rows that are sent to the Accounting Line for Contracts and Projects table with this date at the end of the process.
Option	Select a project business unit, project, or activity option to restrict processing to these values.
Project Type and **Project Manager**	Enter values as required to further define the run control options.

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Field or Control	Description
Process Option	Select the type of transactions in the Project Transaction table that you want to process. Options are: *Process All* *Process Costs* *Process Revenue*
Process Milestones	Select for the Process Project Accounting process to initiate the Milestone Processing Application Engine process (CA_MS_PRCS) to process milestones for contracts that meet the run control criteria.
Process Journal Entries	Select to automatically run the Journal Generator and Contracts Billing Interface processes after running the Process Project Accounting process. The system uses the following information when you process journal entries from the Process Project Accounting run control page: • Journal Generator template that you define on the Accounting Rules page. • Accounting definition that you define on the Installation Options - Contracts page. • Default ledger group that you define on the Ledgers for a Unit - Definition page.

See also, *PeopleTools: PeopleSoft Process Scheduler*

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7

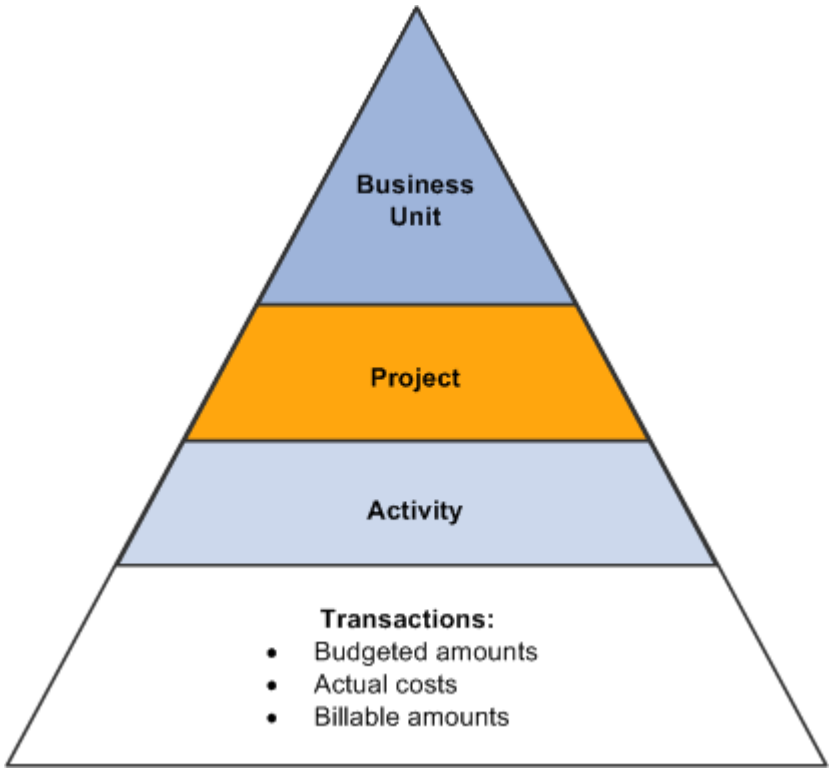
Creating and Maintaining Projects

Understanding Projects

After you set up your Project Costing system, you can create projects and add activities to them. You can do this manually through Project Costing or by using batch processes and integration with other applications.

At the highest level, projects are managed within a project business unit. Within each project, costs are organized and analyzed by activity. Activities are the specific tasks that make up a project. During the course of an activity, transactions are created for such things as labor and materials. Transactions are attached only at the activity level. Project Costing organizes and groups these transactions to monitor and report on the conditions of a project. This diagram illustrates the hierarchy:

Hierarchy of business unit at the top, then project, then activity, and then transactions.



All project transactions are stored in the Project Transaction table (PROJ_RESOURCE). Project transactions provide the basis for project reporting, analysis, billing, and asset capitalization.

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Understanding Project Creation Options

Project Costing provides project creation tools that eliminate the need to re-create key information for each new project. To create a new project, you can perform any of these actions:

- Add a new, blank project and enter the required information.
- Use a predefined project template or copy any existing project as a starting point for a new project.
- Receive projects from feeder systems such as PeopleSoft Program Management or PeopleSoft Proposal Management.
- Create a project from a Microsoft Project file.

Project Templates

You can create and modify an unlimited number of reusable project templates to populate new projects with preset standard information such as project and activity-level information, teams, budget plans, and attachments. You can also modify existing active or pending projects using data from templates.

To create a template, either save a new or existing project as a template, or create a new template by starting with a blank project. For easy access to your templates, you can attach a link to the templates on the My Projects page. Alternatively, you can search for project templates—just as you search for transactional projects—using many of the component search pages in the Project Definitions, Activity Definitions, and Budgeting menu navigation folders. To search for templates, enter a processing status of *Template* as a search criteria to view the list of available project templates.

The Copy Template Option 1 and Copy Template Option 2 pages in the Project Costing Options component (PC_BUS_UNIT_OPT) identify the tables that the system uses to copy data into projects and activities that you create or modify by using project templates.

Process Flow - Creating a Template from a Blank Project

This diagram illustrates the process of creating a new template from a blank project:

Steps for creating a template from a new project.

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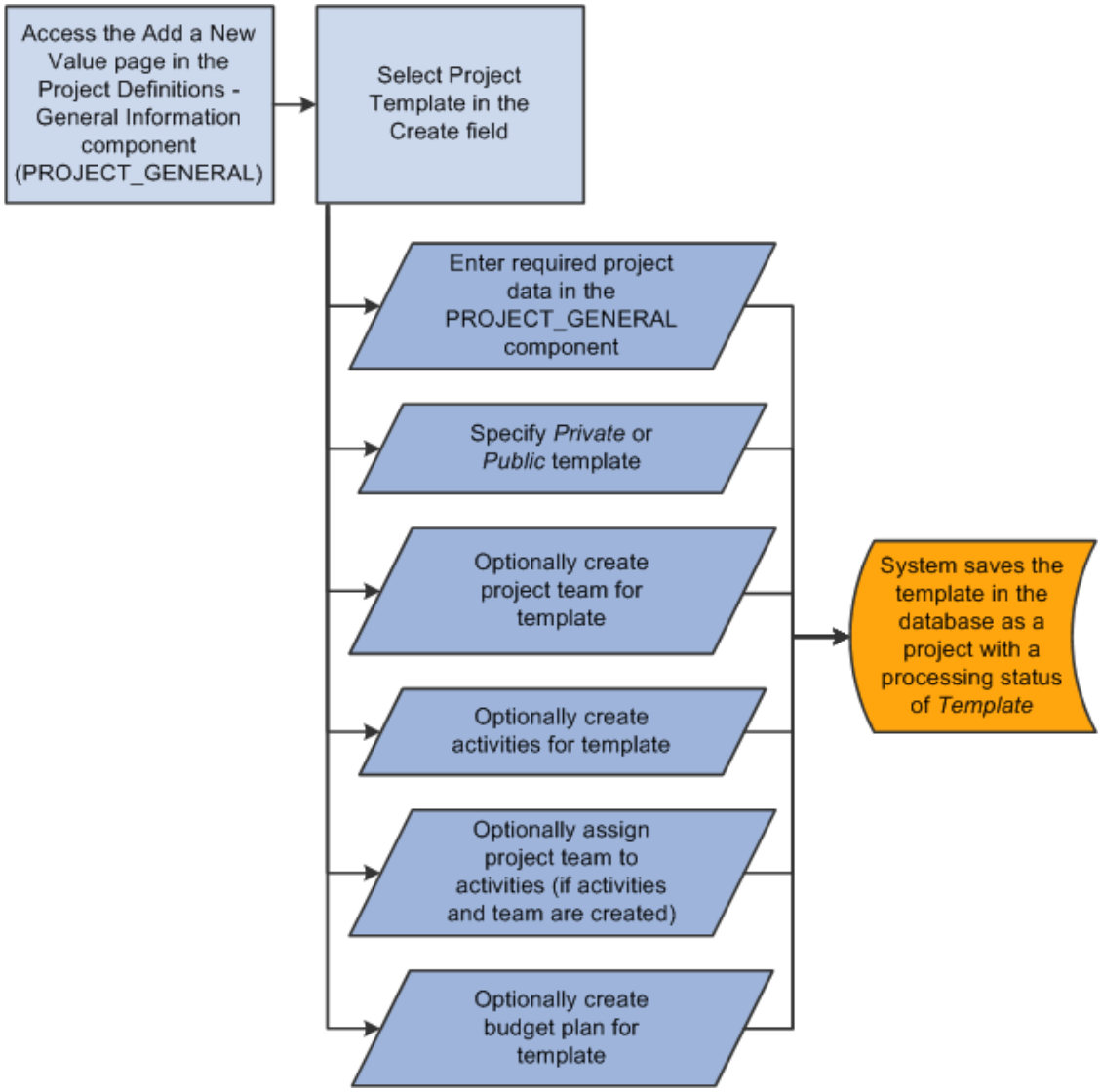

Process Flow - Creating a Template from an Existing Project

This diagram illustrates the process of creating a new template from an existing project:

Steps for creating a template from an existing project.

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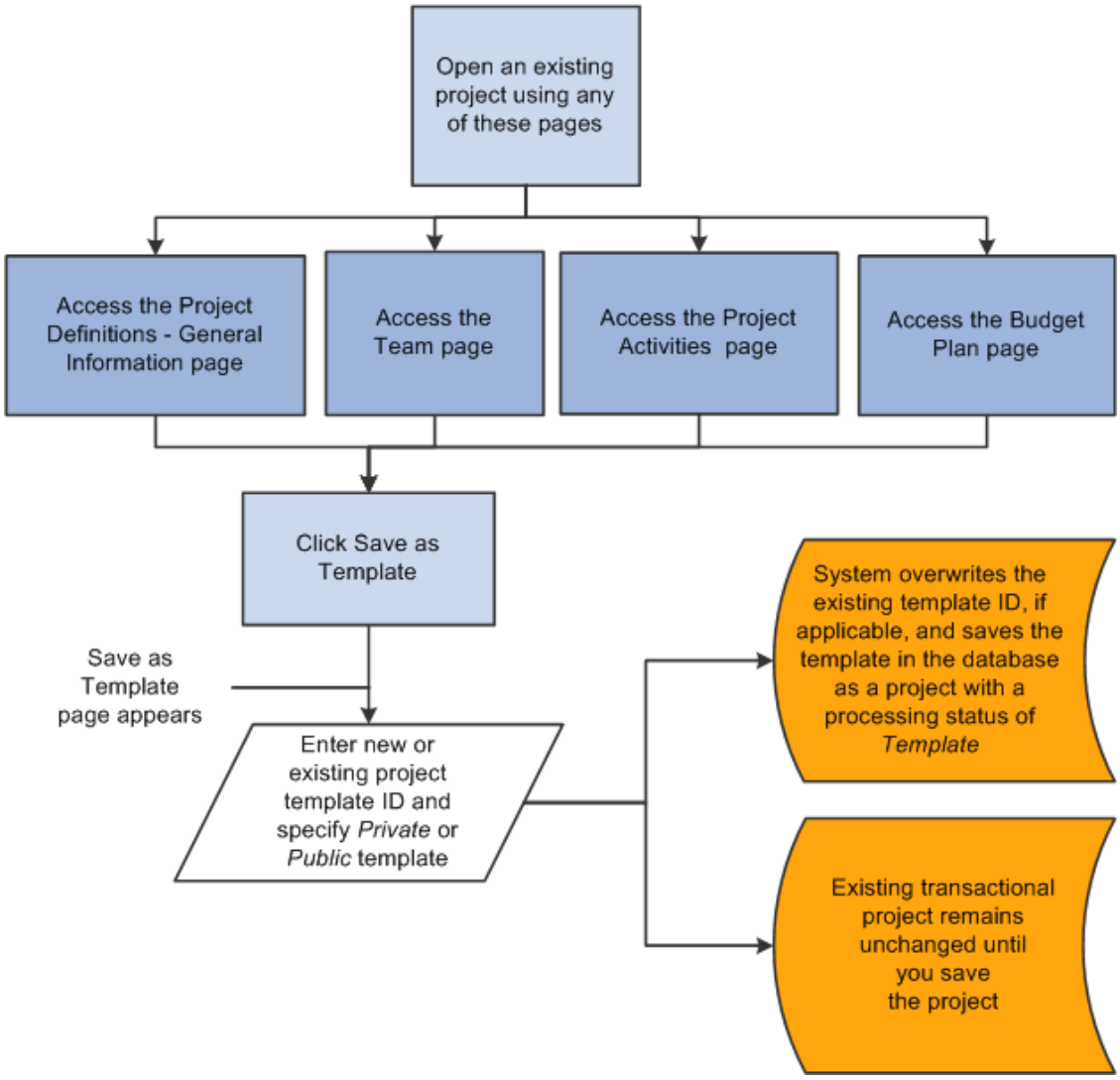

Modify Existing Projects with Templates

If you use project templates to modify existing projects, the system determines which template data to append or overwrite to the existing project data, or ignore, based on the criteria that you select and:

- The project processing status.
- Duplicate data, if it exists on the project.
- The business unit options in the Copy Template Option 1 and Copy Template Option 2 pages that identify the tables that the system uses to copy data into projects and activities.

> **Note**
>
> You can use project templates to modify existing transactional projects; however, you cannot use project templates to modify other existing templates.

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This table lists the pages that you can use to import template data into an existing project based on the project processing status:

Pages Used to Import Template Data	Project Processing Status
All pages in the Project General component (PROJECT_GENERAL)	Pending
Project Activities	Pending
Team (if you use PeopleSoft Project Costing without PeopleSoft Program Management)	Pending Active
Resources (if you use PeopleSoft Program Management)	Pending Active

This diagram illustrates the process of importing data from a project template into an existing project:

Steps for importing data to an existing project from a template.

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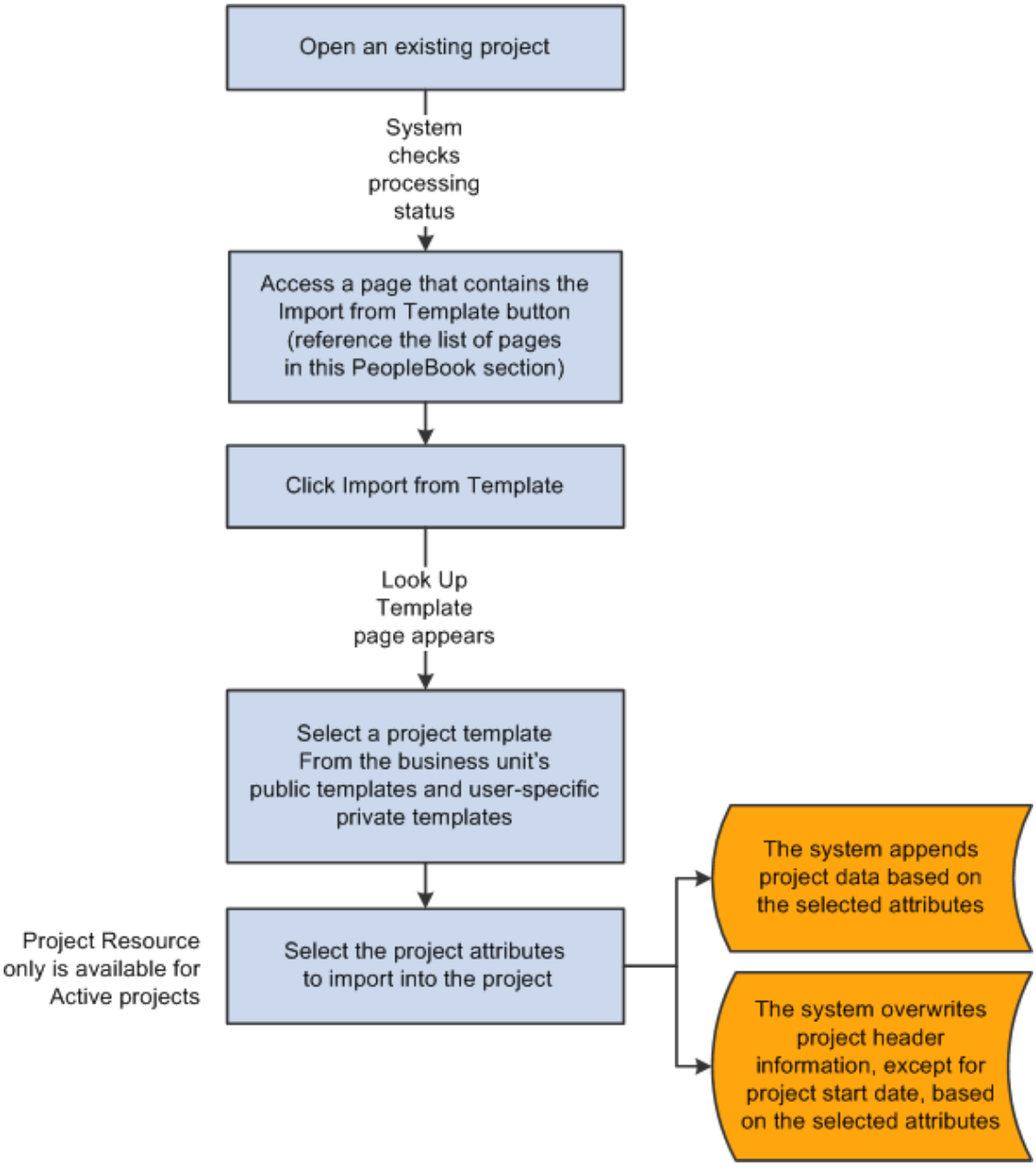

Security and Structure

Templates can be public or private. Templates are designated as public or private at the project level, and the designation applies to all information on the template. Users who have security permission to create and modify projects for a business unit and project type can create and modify public templates. Users can create their own user-specific, private templates to use in projects and to view or modify as needed.

The system treats project templates as projects with a processing status of *Template.* Templates use the same project tables, pages, and menu structure as transactional projects. However, you cannot post transactions against templates; they do not appear in transactional project reports and in some component search pages, and they are available only in PeopleSoft Project Costing and PeopleSoft Program Management.

You can delete templates by using the Project Delete utility.

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Project Copies

Any project and activity to which you have access is available to be copied to new or existing projects and activities. You can copy project and activity-level information, project and activity team, and transactions to a new project.

You must open a project to copy information from that project. The Copy Template Option 1 and Copy Template Option 2 pages in the Project Costing Options component for the business unit identify the tables that the system uses to copy data into projects and activities that you create or modify by using a copy of an existing project.

You can access the Project Copy feature by using any of these methods:

- Create a new project by selecting the *Project from Copy* option on the Project Definitions - General Information - Add a New Value page.
- Modify an existing project or create a new project by clicking *Copy Project* on any Project General component page of the project that you want to copy.
- Create a new project by navigating to the Copy Project page from the **Project Costing**, and then **Utilities** menu navigation folder.

Understanding Project Managers

You can select project managers for projects, project templates, and programs. If you use PeopleSoft Expenses, you can control project costs by requiring the project manager to approve time and expense reports in Expenses. If you use PeopleSoft Program Management and PeopleSoft Resource Management, you can enable workflow to send resource assignments to the project manager for approval if another user adds resources to the project by using Resource Management. Additionally, you can enable workflow to send assignment schedule changes to the project manager for approval.

If you use PeopleSoft Program Management:

- The system automatically assigns the project manager as the issue owner when issues are created for the project.
- The system assigns the project manager as the issue owner if an issue is created for a project activity, and no activity owner exists.
- The system automatically lists the project manager as an interested party on issues created for the project.
- The project manager can modify a project without submitting a change request if you use change requests on the project.

You select project managers for projects and templates on the Project Definitions - Team Detail page if you use PeopleSoft Project Costing without PeopleSoft Program Management. You can designate any project team member as the project manager, regardless of the team member's project role. A project can have different project managers for different time periods, but the time periods cannot overlap. You can view current, previous, and future project managers in the Project Definitions - Manager page.

Program Managers

Some of the rules for defining project managers also apply to program managers. For example, you can assign different program managers for different time periods, but the time periods cannot overlap. Additionally, you can assign the program manager on the Project Definitions - Team Detail page.

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However, some differences exist in the way that the system treats program managers and project managers:

- You can enter and modify program managers on the Project Definitions - Manager page, as well as on the Resource Detail page.
- You can select any employee as a program manager.

  Employee data is loaded into the Financial Management Solutions (FMS) database from the Human Capital Management (HCM) database by means of an application messaging process that uses the PERSON_BASIC_SYNC and PERSON_BASIC_FULLSYNC enterprise integration points (EIPs).
- You can assign a manager to a program, and then change the program to a detail project.

  The system automatically adds the project manager to the project team. If multiple effective-dated project managers exist for the program when you change the program to a detail project, the system adds all of the project managers to the project team and selects the **Project Manager** check box for the current project manager on the Resources page.

You cannot change a project to a program after you assign a manager to the project.

Creating Project Templates

Pages Used to Create Project Templates

Page Name	Definition Name	Usage
Save as Template Page	PC_SAVEAS_TMPL	Save an existing transactional project as a project template.
Project Definitions - General Information Page	PROJECT_GEN_01A	Create a new template from a blank project.

Save as Template Page

Use the Save as Template page (PC_SAVEAS_TMPL) to save an existing transactional project as a project template.

Navigation:

- **Project Costing**, and then **Project Definitions or Activity Definitions**, and then **Team**. Click **Save as Template** on the Team page.
- **Project Costing**, and then **Budgeting**, and then **Budget Plan**. Click **Save as Template** on the Budget Plan page.
- **Project Costing or Program Management**, and then **Project Definitions**, and then **Define Project General Info**. Click **Save as Template** on any Project General component page.
- **Project Costing or Program Management**, and then **Activity Definitions**, and then **Define Project Activities**. Click **Save as Template** on the Project Activities page.
- **Program Management**, and then **Project Definitions or Activity Definitions**, and then **Project Definition Resources**. Click **Save as Template** on the Resources page.

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

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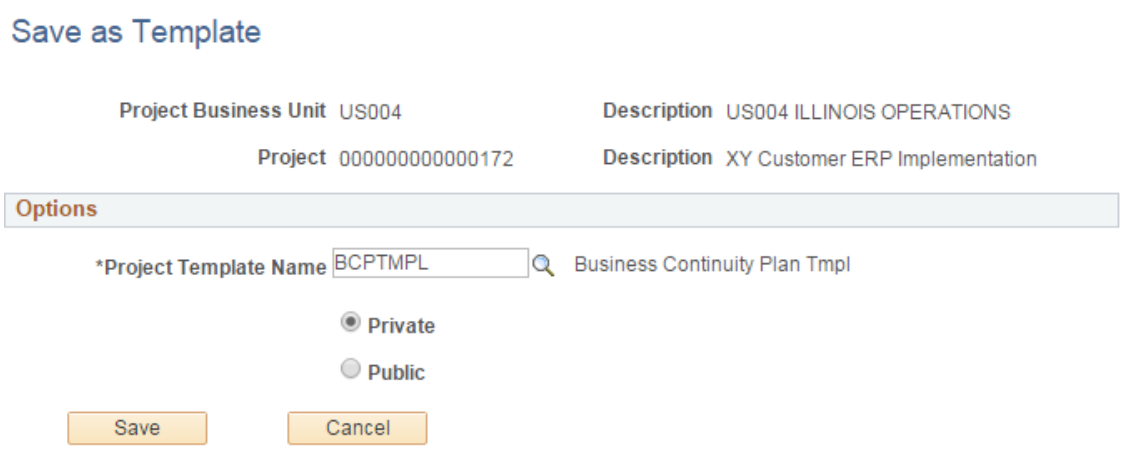

The template inherits the project business unit.

Field or Control	Description
Project Template	Enter *NEXT* for the system to assign the next sequential project ID, or enter a unique project template ID, or select an existing template to replace. If you select an existing template, the system overwrites all data on the existing template with the new project information when you save the page. Only active project templates are available for selection.
Private and **Public**	Select **Private** to create a template that only you can use and modify. This is the default option. Select **Public** to create or search for a template that all users who have security permission to create projects can use and modify.

When you save the page, the system copies project-level information, project team, budget plan, activities, activity assignments, work breakdown structure (WBS), and deliverables (if you use PeopleSoft Program Management) from the original project to a template project, and opens the Project Definitions - General Information page for the template.

The system copies budget items and any distributed amounts to the new project, but does not copy budget adjustments.

In the Project Definition - General Information page for new templates, initially the **Project Status** field is editable. After you select a project status for the template and save the Project Definitions - General Information page for the first time, the **Project Status** field is no longer editable. The **Processing Status** field value is *Template* and does not change.

For each labor resource on the original project:

- Only one assignment schedule row appears on the template for a labor resource, even if the assignment schedule contains multiple date ranges.
- The assignment schedule row start date on the template is based on the project start date, and the end date is based on the project end date.

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- The project role is based on the project role listed in the first row in the **Availability** dates grid on the Project Definitions - Team Detail page for a resource if you use PeopleSoft Project Costing without PeopleSoft Program Management.

  The project role is based on the **Primary Project Role** field on the Resources page, if you use PeopleSoft Program Management.

- No assignment ID exists for project templates.

  The system does not create assignments in PeopleSoft Resource Management for resources on project templates.

Go to the Project Costing Options - Copy Template Option pages to view the list of tables that are eligible for the system to copy to a template project.

See Copy Template Option 1 Page.

> **Note**
>
> When you click **Save as Template** on the original transactional project, the system does not save any modifications that you made to the transactional project. You must click **Save** on the transactional project to save any modifications that you made since the previous save.

Creating Project Templates from Blank Projects

Use the Project Definitions - General Information page (PROJECT_GEN_01A) to create a new template from a blank project.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**. Click the **Add a New Value** tab.

When you add a new project, select *Project Template* as the create option and click **Add.**

The system assigns a processing status of *Template.*

Designate the template as *Public* or *Private.* The default value is *Private.* Enter the required project level information as you would when you create a new transactional project. Optionally create a project team, activities, activity team, and budget plan.

Creating New Projects by Using Templates

Page Used to Create New Projects by Using Templates

Page Name	Definition Name	Usage
Create Project From Template Page	PC_CRTPRJ_TMPL	Select a project template to use as a starting point for a new project.

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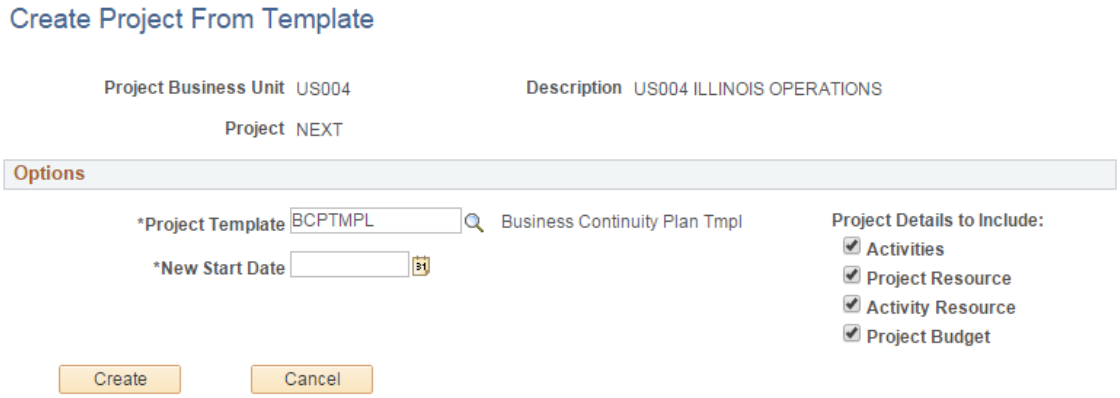
Create Project From Template Page

Use the Create Project From Template page (PC_CRTPRJ_TMPL) to select a project template to use as a starting point for a new project.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**. Select *Project from Template* as the **Create** option on the General Information - Add a New Value page, and then click the **Add** button.

This example illustrates the fields and controls on the Create Project From Template page. You can find definitions for the fields and controls later on this page.



Use this page to specify the template, start date, and details to copy to a new project.

Field or Control	Description
Project Template	Select the template that contains the information that you want to copy into a new project. The list of available templates is based on the business unit's public templates and your user-specific private templates. Only active project templates are available for selection.

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Field or Control	Description
New Start Date	Enter the new project start date that the system uses to calculate other project and activity-related dates. The system calculates the new project and activity start and end dates by using the new project start date, the date ranges in the template, and the relationship of the dates to the template project start date to calculate: • The project end date. • Activity start and end dates. • Project team planned start and end dates. • Assignment schedule start and end dates. • Project Budget dates. If you use PeopleSoft Program Management, the system calculates the correct activity start and end dates for the new project based on activity dependencies. The system also uses the new project start date to calculate activity deliverable due dates and deadlines. See PeopleSoft Program Management: Copying Projects with Dependent Activities.
Activities	Select to copy all activities from the template to the new project. This option is selected by default. Activity information includes the WBS and activity attachments. If you use PeopleSoft Program Management, the imported information also includes dependencies and deliverables. If you create project activities from a template, the system does not copy any activity constraints to the target activities. See PeopleSoft Program Management: Copying Activities with Constraints.
Project Resource	Select to copy all active project resources from the template to the new project. This option is selected by default. The system does not copy inactive resources. If the template contains inactive resources, a message appears when you click **Create** stating that one or more of the resources from the template are no longer active and are not copied to the open project.
Activity Resource	Select to copy activity resources from the template to the new project. This option is available if you select the **Activities** and **Project Resource** options. The **Activity Resource** option is selected by default.

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Field or Control	Description
Project Budget	Select to copy the active project budget from the template to the new project. This option is available if you select the **Activities** option. The **Project Budget** option is selected by default. The system copies budget items and any distributed amounts to the new project, but does not copy budget adjustments. The system does not copy project budgets that use calendars that are not valid for the new project dates. If the template project budget uses a calendar that is not valid, a message appears stating that the budget calendar used in the project budget is not valid for this project's dates. To copy the template project budget to the new project, you must update the template budget calendar to include the new project dates.

The new project status is based on the project status of the project template, and the effective date is based on the project start date. If the project start date is in the future, the project status effective date is the current date.

Creating Projects from Copies

Pages Used to Create Projects from Copies

Page Name	Definition Name	Usage
Copy Project Page	PC_CPY_DETL_PNL1	Create a new project or update an existing project by copying information from an existing project.
Copy Project PageC	PC_CPY_DETL_PNL	Create new projects by copying information from existing projects.

Copy Project Page

Use the Copy Project page (PC_CPY_DETL_PNL1) to create a new project or update an existing project by copying information from an existing project.

Navigation:

- Select **Project Costing**, and then **Project Definitions**, and then **Define Project General Info**. Click **Copy Project** on any Project General component page.
- Select a create type of *Project from Copy* on the General Information - Add a New Value page.
- Select **Project Costing**, and then **Utilities**, and then **Copy Project**, and then **Copy Project**

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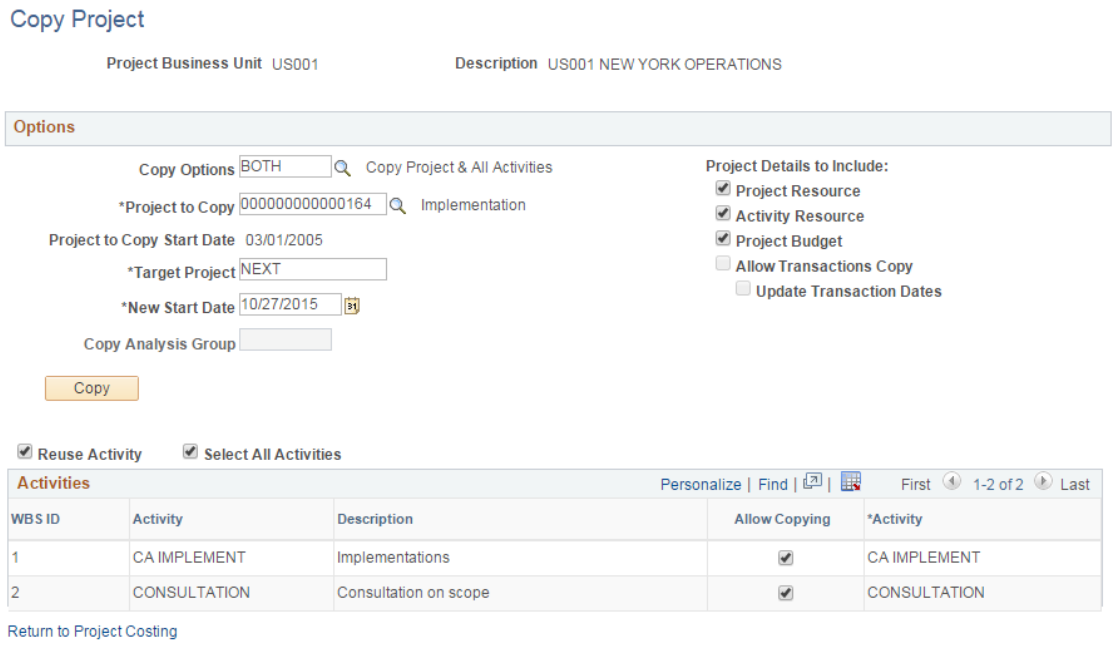
This example illustrates the fields and controls on the Copy Project page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Copy Options	Select a copy option. Available values are based on the options that are selected on the Copy Template Option 1 page for the business unit. For example, if **Allow Project Copy** is selected and **Allow Activity Copy** is deselected on the Copy Template Option 1 page, the only copy option that is available on the Copy Project page is *Copy Project Only*. If **Allow Project Copy** and **Allow Activity Copy** are both selected, you can select from these options: *ACTV:* Copy the activity only. This is the only valid option if the target project is an existing project. The Project to Copy Start Date field value is displayed for this option. *BOTH:* Copy the project and all activities. The Project to Copy Start Date field value is displayed for this option. *PROJ:* Copy the project only. The Project to Copy Start Date field value is displayed for this option.
Project to Copy	Select the source project from which to create the new project. The project description and start date are displayed for the source project. You can select from any transactional project to which you have access in the project business unit.
Project to Copy Start Date	Displays the selected source project start date.

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Field or Control	Description
Update Tree	This group box appears for you to enter the tree name, tree effective date, and parent node for the target project if the **Update Project Tree** option is selected on the Copy Template Option 1 page for the business unit.
Target Project	Enter the name of the new project. Enter *NEXT* for the system to assign the next sequential project ID. If you access the Copy Project page from the Project General component, you can enter an existing project as a target project only if you enter *ACTV* in the **Copy Options** field. Also for this option the new start date that is populated cannot be edited.
New Start Date	New start date is populated for the target project. The new start date can be edited for Copy Options, BOTH and PROJ. The target project's new start date and the source project's duration will be used to calculate the target project's end date.
Copy Analysis Group	Specify the analysis group that the system uses for mapping transactions from the existing project activity to the new project activity. You can enter an analysis group if you allow transactions to be copied to the target project. You cannot enter an analysis group if either of these conditions exist: • The **Allow Transactions Copy** option is not selected on the Copy Template Option 1 page, which indicates that you cannot copy transactions from existing projects to new projects. • Commitment Control is enabled for Project Costing on the Installation Options - Products page, which indicates that you can copy only nontransactional data on this page. The system copies only the rows with an analysis type that is in the selected analysis group. Project Costing delivers the *COPY* analysis group as system data, but you can use any analysis group. If you use the delivered COPY analysis group, the system selects rows with analysis types of ACT (Actual Cost), CAC (Cost Sharing Actuals), and PAY (Time and Labor Actual), and maps them to rows with a BUD (Total Cost Budget) analysis type. This means that actual cost rows are selected from the existing project and created as cost budget rows in the new project. **Note:** If you perform a project copy by using the COPY analysis group and create rows with a BUD analysis type, the BUD rows are inserted directly into the Project Costing transaction table; however, a budget is not created in Projects Budgeting.

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Field or Control	Description
Reuse Activity	Select to create new activities using the same IDs as the existing project's activities. If this check box is not selected then the system will auto-assign the activity using NEXT1, NEXT2, etc.; however, you can then change the activity.
Select All Activities	Select to copy all activities from the existing project to the new project. The system selects the **Allow Copying** check box for all activities in the **Activities** grid. If the selected source project has dependencies the Select All Activities check box will be selected and disabled so that the user cannot modify the value. This ensures that the source project dependencies are enforced in the target project.
Project Resource	Select check box to include the project resource details. If this check box is selected for the Copy Options PROJ then the Activity Resource check box is disabled. However for Copy Options BOTH the Activity Resource check box is also selected when you select this check box and for Copy Options ACTV this check box is disabled.
Activity Resource	Select check box to include the activity resource details. This check box is enabled for Copy Options BOTH and ACTV. For Copy Options BOTH, selecting this check box will also select Project Resource check box and it will be disabled to prevent user from deselecting it. You have to first uncheck the Activity Resource check box to re-enable the Project Resource check box.
Project Budget	Select check box to include the project budget. This check box is enabled only if the source project has an active budget.
Allow Transactions Copy	Displays the setting for the **Allow Transactions Copy** option on the Copy Template Option 1 page. If this option is enabled on the Business Unit Copy Template Option 1 page, selecting this check box will copy the transactions from the source project.
Update Transaction Dates	Displays the setting for the Update Transaction Dates. This option is available only if the Allow Transaction Copy check box is selected. Select the Update Transaction Dates check box to update the transaction and accounting dates based on the New Start Date.
Copy	Click to copy the existing project values to the new project. While copying the system checks for inactive resources and also if the budget periods exists for the new project date.

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Activities

Field or Control	Description
WBS ID (work breakdown structure identifier)	Displays the selected source project activity's WBS ID. The Project Copy process will sequentially renumber the WBS ID if the user chooses to copy only few activities.
Activity	Displays the activities in the existing project that are available to be copied to the new project.
Allow Copying	Select to copy the corresponding activity to the new project. If the selected source project has dependencies the Select All Activities check box will be selected and disabled so that the user must copy all the activities. The Allow Copying check box will also be selected and disabled for the user to make any changes. This ensures that the source project dependencies are enforced in the target project.
Activity	Enter an ID for each activity that will be copied to the new project. If you select the **Reuse Activity** option, this column displays the existing activity IDs that will be used as the activity IDs in the new project else it will be changed to new activity NEXT1, NEXT2, etc. See Understanding Work Breakdown Structures. If you use PeopleSoft Program Management and you create a project from a copy of an existing project, the system copies the project dependencies to the new project. Additionally, if you create a project activity from a copy of an existing project activity, the system copies the activity constraint to the new activity. See PeopleSoft Program Management: Copying Activities with Constraints.

Creating and Defining Projects

Pages Used to Create and Define Projects

Page Name	Definition Name	Usage
Project Definitions - General Information Page	PROJECT_GEN_01A	Create or update a project. This page operates in deferred processing mode.
Project Hierarchy Page	PC_CHART_DISPLAY	Display a project and it's activities in a graphical manner.

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Page Name	Definition Name	Usage
Additional Dates Page	PC_ADD_DATES_SEC	Optionally enter project baseline start and finish dates, early start and finish dates, actual start and finish dates, and late start and finish dates.
Project Definitions - Project Costing Definition Page	PROJECT_GEN_01	Define various project options, project currency, and analysis groups.
Assign To Project Tree Page	PC_PROJ_TREE_SEC	Add a project to a project tree.
Program Management Page	PROJECT_GEN_02	Define options if you use PeopleSoft Program Management.
Project Definitions - Manager Page	PROJECT_MGR	View and track project managers. Enter program managers if you use PeopleSoft Program Management.
Project Definitions - Location Page	PROJECT_LOCATION	Assign the physical location of the project.
Project Definitions - Phases Page	PROJECT_SCHED	Track time spent on stages of a project.
Project Definitions - Approval Page	PROJECT_APPROVAL	Specify which project events require approval, who is authorized to approve the events, and in what order the events must be approved. Approve a project event or check on approval status.
Project Definitions - Justification Page	PROJ_JUSTIFY	If your company employs an approval cycle for projects, enter a reason for justifying a project-related action.
Project Definitions - User Fields Page	PC_PROJ_USER	Specify additional, project information for the organization.
Security by Permission List Page	PROJECT_SEC_OPRCLS	View and add permission lists to which the project was attached. This page is available in the Project General component only if security is defined using permission list, list-based security. For additional information about Project Security, see Understanding Project Security
Project Definitions - Rates Page	PROJECT_SERVICES	Track billing, costing, and burdening project rates and view contracts integration information that is associated with a project.
Project Definitions - Attachments Page	PROJECT_DOC_01	Attach, view, and delete project-related files.

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Page Name	Definition Name	Usage
Project Definitions - Asset Integration Rules Page	PC_AM_RULE_PRJ	Define integration with PeopleSoft Asset Management at the project level. for additional information about setting up asset integration rules, see Understanding Asset Capitalization Processes
Project Definitions - Budget Alerts Page	PC_BUD_PROJ_ALERTS	Define budget alert thresholds at the project level for cost budgeting to alert the project manager of potential cost overruns at the project level. For additional information about setting up budgets and budget alerts, see Setting Up Budgets in PeopleSoft Project Costing

Project Definitions - General Information Page

Use the Project Definitions - General Information page (PROJECT_GEN_01A) to create or update a project.

This page operates in deferred processing mode.

You can use the Project Definitions - General Information - Keyword Search page to perform keyword searches for projects. Keyword search allows you to execute a deeper, more free-form search, to access application data. For additional information on keyword searches, see the product documentation for *PeopleTools: Search Technology*, Working with Keyword Search modes.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **General Information**

This example illustrates the fields and controls on the Project Definition - General Information page. You can find definitions for the fields and controls later on this page.

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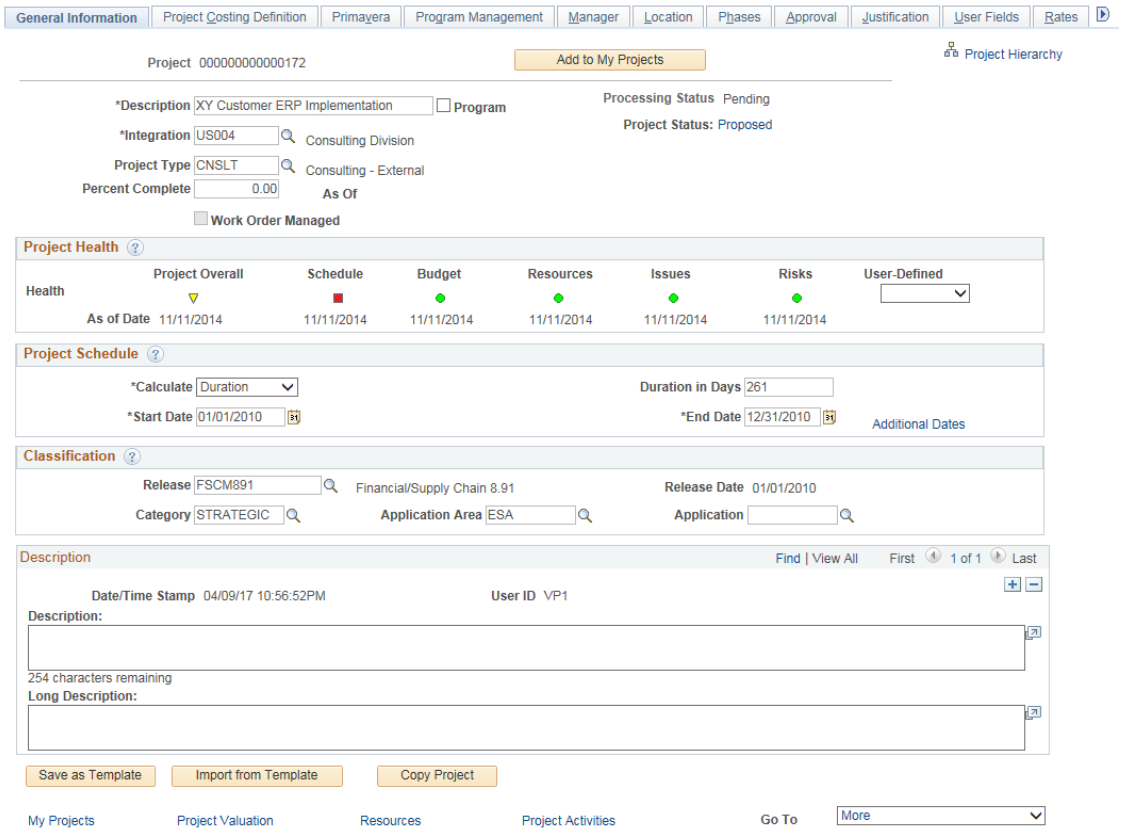

Field or Control	Description
Create	Select an option on the General Information - Add a New Value page to create a new project. Available options are: *Blank Project:* Creates a new transactional project and opens the Project Definitions - General Information page. *Project Template:* Creates a new project template and opens the Project Definitions - General Information page. *Project from Copy:* Opens the Copy Project page so that you can identify the source project, target project, and copy options. *Project from Microsoft Project:* Opens the Create Project from Microsoft page so that you can identify key project fields and integration options to create a new project from an existing Microsoft Project. *Project from Template:* Opens the Create Project From Template page so that you can identify the project template, new start date, and project details to include in the new project. Only active project templates are available for creating the project.

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Field or Control	Description
Project	Leave the default value of *NEXT* for the system to assign the next sequential project ID, or override the default value with a unique project ID.
Add to My Projects	Click to add this project to the list of projects that appear on your My Projects page. This button appears only when *Manual* or *Auto Populate, Allow Override* is selected in the My Projects Setup field on the Application Fundamentals: Installation Options - Project Costing Page.
Program	Select to designate this project as a program or summary project. When this option is selected, the system prevents you from adding activities to the program because only projects can have activities. If you try to select this option for a project that already has activities, a message appears indicating that the project cannot be changed to a program because it has activities associated with it, and you must either remove the activities from the existing project or create a new program. After you convert a project to a program by selecting this option and saving your changes, the project ID of this program is available in various program and parent project ID prompt list fields that appear on pages throughout the PeopleSoft Program Management system.

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Field or Control	Description
Processing Status	Displays the processing status that is associated with the project status. The system uses the processing status to restrict incoming transactions. You map project status types to processing statuses during implementation on the Project Status Defaults page. Processing statuses are: *Active:* Projects can be selected from prompt lists in PeopleSoft feeder systems, allowing transactions from the feeder systems to be attributed to the project. This is the default processing status for new projects if you use PeopleSoft Project Costing without PeopleSoft Program Management. *Inactive:* Projects do not appear in prompt lists in PeopleSoft feeder systems. *Pending:* Projects are not active yet, but you can begin some planning, such as creating a budget and project team. You cannot charge cost transactions to pending projects. This is the default value for new projects if you use PeopleSoft Program Management. *Template:* Project Template is associated with this status. See Creating Project Templates. See Project Status Defaults Page.
Template Status	Displays the project template status. The status can be changed between *Active* and *Inactive* for the template. The display also includes if the project template is *Public* or *Private*. This field appears only if the Processing Status is *Template*.
Integration	Enter the integration template that is used to integrate this project with other financial applications. Available values are from the Integration Template table (PC_INT_TMPL). The default value is based on the integration template that is defined on the User Preferences page.

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Field or Control	Description
Project Status	Enter the project's status when you are in add mode. After you save the project for the first time, the **Project Status** field becomes read-only on this page and appears as a link to the Project Definitions - Status page so that you can update the status. If you use PeopleSoft Project Costing without PeopleSoft Program Management, the default value of this field is based on the **Default Project Status** field value on the Project Status Defaults page that maps to the active processing status. If you use PeopleSoft Program Management, the default value of this field is based on the **Default Project Status** field value that maps to the **Pending Processing Status.** The system updates the **Processing Status** field value based on the value that you enter in this field. You set up project status type values and project status default values during implementation. See Status Types Page, Project Status Defaults Page.
Project Type	Select a project type. Use project types to: • Group similar projects for reporting and analysis. • Determine the default rate plan for the project. When you create a new project and specify the project type, the system automatically populates the default rate set field in the Project Definitions - Rates page with the default rate set that is associated with the project type for the business unit. • Determine whether to use the project type status path. The system controls the project status progression based on the custom project status path that is associated with the project type for the business unit. You set up project types during implementation on the Project Types page. See Project Types Page.
Contract Number	Click the contract number link to access the contract header (General) page and the contract Lines page. This field is only displayed when in update mode and the project is associated with a grants project.

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Field or Control	Description
(Information)	Click to access the Award page for the contract and project. This field is only displayed when in update mode and the project is associated with a grants project.
Percent Complete	Displays the percentage of the project completed based on the calculation method that you define on the Project Costing Definition page. If you select *Manual* in the **Calculation Method** field on the Project Costing Definition page, you can enter a value in the **Percent Complete** field on this page. If you select a calculation method of *Budget Amount, Budget Hours, Duration, Forecast Amount,* or *Forecast Hours,* the system automatically calculates and displays the percent complete value. The **Duration** calculation method is available only if you use PeopleSoft Program Management. See Project Costing Options Page.
As Of (percent complete)	Displays the date that you enter the percent complete data. The date and time appear when you enter a percent complete value and save the page.
Project Health	Enter a value that represents the project's health. If you use PeopleSoft Project Costing without PeopleSoft Program Management, select *Fair, Good,* or *Poor* from the drop-down list box. A visual indicator that represents the project's overall health appears on the My Projects page. If you use PeopleSoft Program Management, fields appear that indicate health for **Project Overall, Schedule, Budget, Resources, Issues, Risks,** and **User-Defined.** Values for these fields are based on the default methods of calculating project health that are specified on the Program Management Options - Health Options page for the business unit. See PeopleSoft Program Management: Health Options Page.
As Of Date (project health)	Displays the date that you enter the project health data.

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Field or Control	Description
Work Order Managed	Select to designate the project as a work order-managed project, which indicates that the project is managed with work orders in PeopleSoft Maintenance Management instead of by a project manager in Project Costing. This check box becomes unavailable when you save the Project Definition page and an activity is associated with the project. If an activity is not associated with the project, and you save the page, the field remains open and available. This field appears only if you use PeopleSoft Maintenance Management. The default value is deselected. See Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing.

Project Schedule

Field or Control	Description
Start Date	Select the project start date. The start date cannot be after any of the project's activity start dates.
End Date	Select the date that the project ends. The end date cannot be before any of the project's activity end dates.
Additional Dates	Click to access the Additional Dates page, where you can enter project baseline start and finish dates, early start and finish dates, actual start and finish dates, and late start and finish dates.
Calculate	Select *Start Date*, *End Date*, or *Duration* (days) to specify which one of these three fields is calculated by the system based on the values that you enter for the other two fields. For example, select *End Date* for the system to calculate the end date based on the values that you enter for start date and duration. The default value is based on the project calculation method that is specified on the Program Management Options page for the business unit. The **Calculate** field is available only if you use PeopleSoft Program Management.
Duration in Days	Enter the number of business days between the start date and end date of the project or program. This field is available only if you use PeopleSoft Program Management.

Classification

The fields in this group box appear only if you use PeopleSoft Program Management.

See PeopleSoft Program Management: Setting Up General Control Data.

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Field or Control	Description
Release	Select a release to further classify the project. Available values are based on active releases in the Release table (PGM_RELEASE_ALL). You can specify a release for projects in any processing status. This field appears only for projects, not programs. You cannot specify releases for programs. The release description appears when you enter the release.
Release Date	Displays the current target release date when you enter the release. This field appears only for projects, not for programs.
Category	Select a category to further classify the project. Available values are based on the categories in the Active Categories table (PGM_CATEGORY_AC) that are valid for the business unit based on the SetID mapping.
Application Area	Select an application area to further classify the project. Available values are based on the application areas in the Active Application Areas table (PGM_APPLAREA_AC) that are valid for the business unit based on the SetID mapping.
Application	Select an application. Available values are based on the application area.

Additional Pages

Additional buttons and links appear on the page for existing projects or when you save new projects.

Field or Control	Description
Save as Template	Click to access the Save as Template page to save an existing transactional project as a project template. Only active project templates are available for selection. The **Save as Template** button appears on this page for pending and active projects. This field appears only for projects and not for programs.
Import from Template	Click to access the Import From Template page and import data into an existing transactional project from a project template. Only active project templates are available for selection. The **Import from Template** button appears on this page for pending projects. This field appears only for projects and not for programs.
Copy Project	Click to access the Copy Project page and modify an existing project or create a new project with information from this project. The **Copy Project** button appears on this page for pending and active projects. This field appears only for projects and not for programs.

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Field or Control	Description
My Projects	Click to access the My Projects page to view a list of your projects and templates.
Project Valuation	Click to access the Project Valuation page. See Setting Up and Using Project Valuation.
Project Team	Click to access the Project Definitions - Team page to view and modify membership to the project team. This link appears if you use PeopleSoft Project Costing without PeopleSoft Program Management. See Creating Project and Activity Teams.
Resources	Click to access the Resources page to view and modify the list of project team resources. This link appears if you use PeopleSoft Program Management. See PeopleSoft Program Management: Adding and Modifying Project Resources.
Project Activities	Click to access the Project Activities page to view and modify the project's activities. See Adding Activities to Projects.

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Field or Control	Description
More	Select an option to access project-related pages: *Integrate with MSProject:* Access the Integrate with Microsoft Project page to create or update a project in Microsoft Project with data in a PeopleSoft Project Costing or PeopleSoft Program Management project. See Integrate with Microsoft Project Page. *Manager Workbench:* Access the Manager Workbench to view a summary of the project's health scorecard, milestones, issues, risks, change requests, and project deliverables. This option appears only if you use PeopleSoft Program Management. See PeopleSoft Program Management: Reviewing Programs and Projects. *PC Chartfield Default for WO:* Access the Work Order Project Chart field Mapping page (WM_PC_DFLT_CFS) for a business unit, work type, and service group combination to specify default project ChartField values for work order tasks. This option appears only if you use PeopleSoft Maintenance Management. See PeopleSoft Maintenance Management: Setting Up Rules and Data Related to PeopleSoft Project Costing. *Project Budgeting:* Access the Budget Plan page, if a budget plan exists for this project, to view budget plans associated with the current project. See Creating and Defining Budget Plans. *Project Defaults for WO:* Access the Work Order - Projects Association page to specify default work order values on projects. This option appears only if you use PeopleSoft Maintenance Management. See PeopleSoft Maintenance Management: Setting Up Rules and Data Related to PeopleSoft Project Costing. *Project Initiation Checklist:* Access the Project Initiation Checklist page to view a list of steps that are required to set up, initiate, and track a project. The page also provides links to the components where each step of a project is implemented. See Initiating Projects by Using Project Initiation Checklists. *Project Request:* Access the Project Request page if the project is associated with a project request. This option appears only if you use PeopleSoft Program Management. *Project Status:* Access the Project Definitions - Status page to view or define project status. See Maintaining Project Status. *Status Report Frequency:* Access the Status Report Frequency page to define or view how

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Field or Control	Description
	often status reports are required for the project. This option appears only if you use PeopleSoft Program Management. See PeopleSoft Program Management: Defining Status Reports. *Status Report Reminder:* Access the Status Report Reminder run control page to send email notifications to project team members as a reminder of status report due dates. This option appears only if you use PeopleSoft Program Management. See PeopleSoft Program Management: Status Report Reminder Page.
Project Hierarchy	Click to access the Project Hierarchy page to view a project and it's activities in a graphical manner. **Note:** You must create atleast one activity to be able to view the project hierarchy link and icon for a new project.

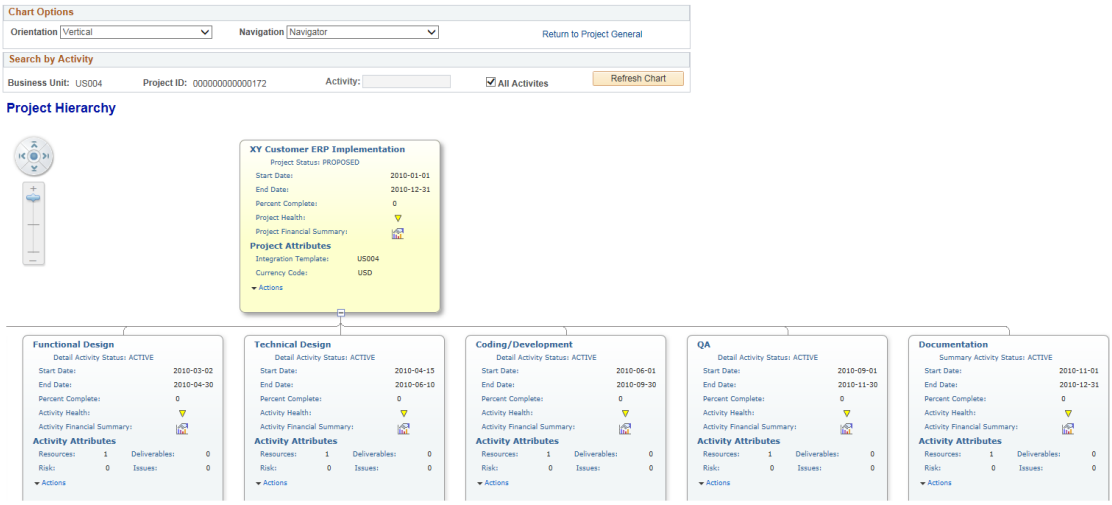
Project Hierarchy Page

Use the Project Hierarchy page (PC_CHART_DISPLAY) to display a project and it's activities in a graphical manner.

Navigation:

Click **Project Hierarchy** icon on the Project Definitions - General Information page.

This example illustrates the fields and controls on the Chart Options for Vertical Orientation and Navigation. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Orientation	Enter the orientation for the graphic project view.
Navigation	Enter the navigation type for the graphic project view.

The project is displayed at the top of the hierarchy chart and the activities as part of the breakdown structure. A child summary activity is also displays if present. You can click on any of the related content actions, basis your user security role.

> **Note**
>
> Chart Options for the project hierarchy page permits a 3 schema level zoom to view maximum and minimum information for each project and activity node.

For more Information see section, Using the OrgChart Class, in *PeopleTools: PeopleCode API Reference* documentation.

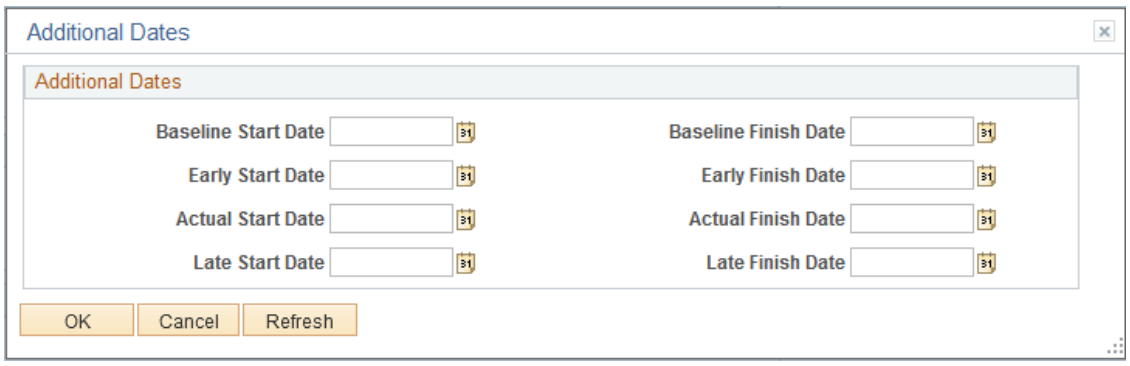
Additional Dates Page

Use the Additional Dates page (PC_ADD_DATES_SEC) to optionally enter project baseline start and finish dates, early start and finish dates, actual start and finish dates, and late start and finish dates.

Navigation:

Click **Additional Dates** on the Project Definitions - General Information page.

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



You can use the additional dates fields as needed for information and reporting. They do not serve a functional purpose in Project Costing.

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Field or Control	Description
Baseline Start Date and **Baseline Finish Date**	Enter the projected start and finish dates for the project.
Early Date Start and **Early Finish Date**	Enter the earliest possible project start and completion dates.
Actual Start Date and **Actual Finish Date**	Enter the actual project start and completion dates. The system can automatically populate these fields when you integrate with the Microsoft Project scheduling application.
Late Start and **Late Finish Date**	Select the latest possible project start and completion dates.

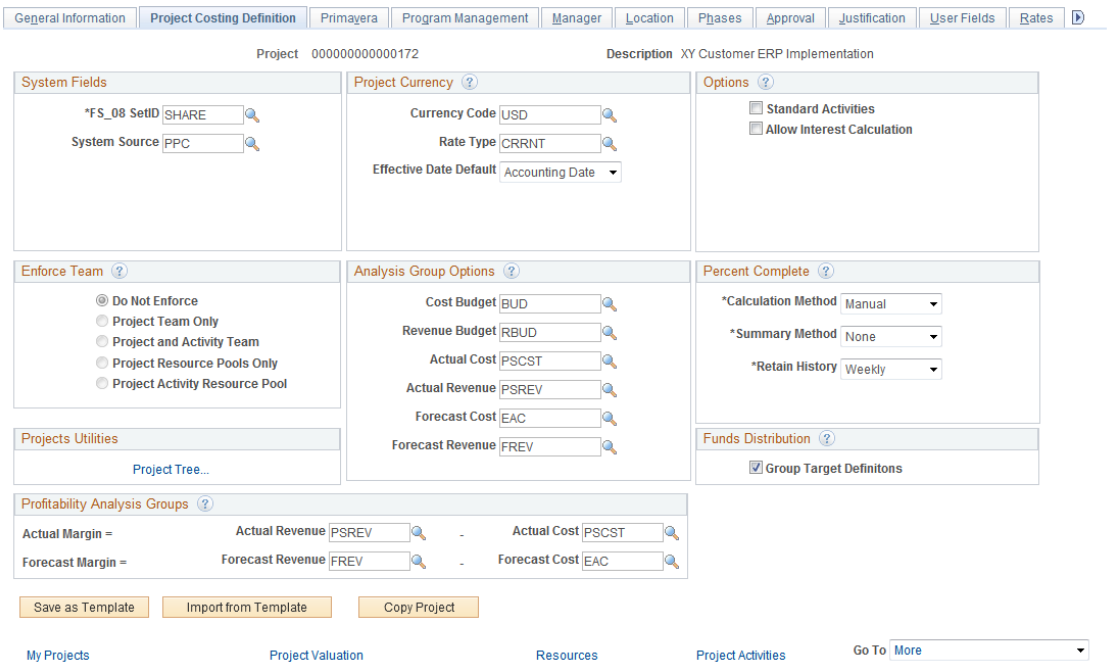
Project Definitions - Project Costing Definition Page

Use the Project Definitions - Project Costing Definition page (PROJECT_GEN_01) to define various project options, project currency, and analysis groups.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Project Costing Definition**

This example illustrates the fields and controls on the Project Definitions - Project Costing Definition page. You can find definitions for the fields and controls later on this page.



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System Fields

Field or Control	Description
FS_08 SetID	Enter a SetID in cases in which multiple project business units relate to the same general ledger business unit. Because a general ledger business unit can relate to only one SetID or project business unit combination, the **FS_08 SetID** field enables you to associate the SetID that the general ledger business unit is using in the FS_08 record group. If you use an integration template that relates the general ledger business unit to a different SetID, the **FS_08 SetID** field changes to the correct SetID value that is used in the FS_08 record group.
System Source	Enter the origin of a project, such as a third-party application or an online entry page in another PeopleSoft application. The default value is *PPC* (Project Costing online entry page). Available values are based on the translate values in the System Source field (SYSTEM_SOURCE) properties.
Auto Review for Period of Performance	Select to automatically review and approve period of performance exceptions for the particular project. This check box defaults from Project Type settings. **Note:** This check box is displayed only if Review Required for Period of Performance check box is selected on the Application Fundamentals: Installation Options - Project Costing Integration Page.

Project Currency

The system uses the currency code and rate type that you define in this group box when you review transactions online through the Transaction List page. The value in the **Project Amount** field on the Transaction Detail page is not stored in Project Costing tables. It is calculated each time that you access the page.

Field or Control	Description
Currency Code	Indicate the type of currency used to track costs. The default value is based on the business unit.
Rate Type	Select the default exchange rate type for the project. The default value is based on the business unit.

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Field or Control	Description
Effective Date Default	Select the default date on which the currency code becomes effective. This field is used in conjunction with the rate type and currency code. Available options are: *Acct Date:* Accounting date. *Cur Date:* Current date. *Trans Date:* Transaction date. **Note:** When source transactions are entered into Project Costing in a currency that is different from the project currency code, the converted value is not stored in any Project Costing table. However, you can view the project currency amount for an individual transaction on the Transaction List page. The system uses the effective date default to determine which date to use when converting the source transaction amount to the project currency code when you view the transaction online.

Options

Field or Control	Description
Standard Activities	Select to restrict this project's activities to a predefined list based on SetID and project type. By default, this check box is deselected. See Standard Activities Page.
Allow Interest Calculation	Select to include costs that are incurred by all activities belonging to the project in interest calculations. Only projects and activities with a processing status of *Active* are eligible for interest calculation. By default, this check box is deselected. If you select the **Allow Interest Calculation** option at the project level, the system automatically selects the **Allow Interest Calculation** option as the default value for all activities that are added to the project. You can override the project default value for individual activities. See Setting Up and Processing Interest Calculations.

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Field or Control	Description
Add me to Project Security	This is a setup option that appears if you use project security and you are creating a new project from a blank project. The field remains visible until you save the Project Costing Definition page and refresh the component. The behavior of the **Add me to Project Security** option is based on the type of security that is enabled on the Security Options page. For example, if you use team-based security, use this option to automatically add yourself—the employee who is associated with the user ID that is logged into the system—to the project team with security access that is determined by your project role. Alternatively, if you use user, tree-based security, use this option to automatically add the new project to a project tree and grant yourself access to the project based on your project role. This list discusses the behavior of the **Add me to Project Security** option based on the project security options that you can select on the Security Options page: • If you use team-based security, select this option and enter your role in the **Project Role** field for the system to automatically add you to the project team with access to the project. The role determines your level of access, such as read-only or read/write. When you select this option, enter the project role, and save the page, the system adds the project to the Project Security page that lists the projects for which you have access. • If you use user, tree-based security, select this option to immediately access the Assign To Project Tree page and add the new project to a project tree. Return to the Project Costing Definition page and enter your project role, which determines your level of access to the project. When you select this option, enter the project role, and save the page, the system automatically adds this project to the Project Security page that lists the projects on this tree for which you have access. • If you use permission list, tree-based security, select this option to immediately access the Assign To Project Tree page and add the new project to a project tree. Return to the Project Costing Definition page and enter your project role, which determines your level of access to the project. When you select this option, enter the project role, and save the page, the system automatically adds this project to the Project Security page that lists the projects on this tree that are associated

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Field or Control	Description
	with the permission list for which you have access. • If you use permission list, list-based security, select this option to automatically add the project to your permission list—the permission list of the user ID who is creating the project. Any user ID with the same permission list as the project creator has the same access to the project. When you select this option, enter the project role, and save the page, the system automatically adds this project to the Project Security page that lists the projects that are associated with this permission list for which you have access. See Defining Project Security.
Project Role	This field appears in conjunction with the **Add me to Project Security** field. Select your project role—the project role of the user ID who is creating the project. The project role contains a security profile that determines your access to projects and activities, such as no access, read-only, or read/write access. The project role can also specify the transactions to which you have access.
Auto Review for Billing	Select to automatically designate transactions for this project as reviewed, indicating that the transactions do not require review by the project manager before being sent to PeopleSoft Billing. This option is available only if the **Review Required for Billing** option is selected on the Installation Options - Project Costing Integration page.

Enforce Team

Designate who can charge time and expenses to a project or activity by selecting an option in the **Enforce Team** group box. These options are available for selection at the project level if you selected the **Decide at the Project Level** option on the Project Costing Options page for the business unit.

Field or Control	Description
Do Not Enforce	Select to indicate no project team restriction. This project is available for employees to charge time and expenses regardless of their membership to the project team. The **Products** drop-down list box does not appear when you select this option.
Project Team Only	Select to indicate that only members of the project team can charge time and expenses to the project. The **Products** drop-down list box appears for you to define the charge restrictions for project team members.

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Field or Control	Description
Project and Activity Team	Select to indicate that only members of the project and activity teams can charge time and expenses to the project. The **Products** drop-down list box appears for you to define the charge restrictions for project and activity team members.
Products	Select the kind of charges to allow for a project or activity. This field is available only if you select an enforce team option of **Project Team Only** or **Project and Activity Team.** Available product options are: *Exp and TL* (Expenses and Time and Labor): Allows members of the project or activity team to charge to the project from both PeopleSoft Expenses and PeopleSoft Time and Labor. *Expenses:* Allows members of the project or activity team to charge to the project from PeopleSoft Expenses. *Time&Labor:* Allows members of the project or activity team to charge to the project from PeopleSoft Time and Labor.
Project Resource Pools Only	Select to enable only resources that belong to the project's resource pools to charge time and expense against the project in the PeopleSoft Expenses system. If you select this option, the *Expenses* value appears in the **Products** field and is not editable. This option appears if both PeopleSoft Program Management and PeopleSoft Resource Management are installed. See PeopleSoft Program Management: Project Resource Pools Page.
Project Activity Resource Pool	Select to enable only resources that belong to an activity's resource pools to charge time and expense against the activity in the PeopleSoft Expenses system. If you select this option, the *Expenses* value appears in the **Products** field and is not editable. You cannot select this option if the **Activity Costing Level** option is selected as the project charging level on the Program Management Options page. This option appears if both PeopleSoft Program Management and PeopleSoft Resource Management are installed. See PeopleSoft Program Management: Program Management Options Page, PeopleSoft Program Management: Activity Resource Pools Page.

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> **Note**
>
> The PeopleSoft Time and Labor application does not enforce project activity team. If you select the **Project and Activity Team** option, and select the *Exp and TL* or *Time&Labor* product option, the system restricts PeopleSoft Time and Labor users for projects to which they can charge time. However, PeopleSoft Time and Labor users can charge time to any activity on a particular project if they have security access to the project.

Analysis Group Options

Default values for these analysis group options are based on the Installation Options - Project Costing page. You can override the default values for the project.

> **Note**
>
> If you are using PeopleSoft Fluid pages to manage projects and you change an analysis group on this page, you should run the Refresh Reporting Tables process (PC_SUM_PR) using the Refresh Reporting Tables Page.

Field or Control	Description
Cost Budget	Select an analysis group for designating cost budget transactions for this project.
Revenue Budget	Select an analysis group for designating revenue budget transactions for this project.
Actual Cost	Select an analysis group for designating actual cost transactions for this project.
Actual Revenue	Select an analysis group for designating actual revenue transactions for this project.
Forecast Cost	Select an analysis group for designating the estimate at completion costs for this project
Forecast Revenue	Select an analysis group that represents the forecasted revenue when the project is complete. This value appears by default from the Installation Options - Project Costing page, but can be overridden.

See Application Fundamentals: Installation Options - Project Costing Page.

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Percent Complete

Field or Control	Description
Calculation Method	Select a method to calculate the percent complete component. The default value is based on the business unit. Available methods are: *Budget Amount* *Budget Hours* *Duration:* This option appears only if you use PeopleSoft Program Management. *Forecast Amount* *Forecast Hours* *Manual* Calculation methods are discussed in more detail in the Project Costing Options Page topic.
Summary Method	Select a method that the system uses to roll up activity completion percentages to the project. The default value is based on the business unit. Available methods are: *None:* This option is available if you select the *Manual* calculation method. *Straight-Line:* This option is available for all calculation methods. *Weighted:* This option is available if you select a calculation method of *Budget Amount, Budget Hours, Duration, Forecast Amount,* or *Forecast Hours.* Summary methods are discussed in more detail in the Project Costing Options Page topic.
Retain History	Select the frequency in which the system retains the percent complete data. The default value is based on the business unit. Available options are: *Daily* *Monthly* *Quarterly* *Weekly* **Note:** If the percent complete calculation method is *Manual,* the system retains the percent complete value that you enter on the Project Definitions - General Information, Activity Definitions - General Information, and Project Activities pages in the history tables based on the selected retain history option. See Project Costing Options Page.

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Projects Utilities

Field or Control	Description
Project Tree	Click to access the Assign To Project Tree page, where you can add the project to a project tree. See Adding Projects to Trees.

Profitability Analysis Groups

Select analysis groups that are used to calculate actual margin and forecast margin. These values may be the same as the values in the **Analysis Group Options** group box, but these fields allow users the flexibility to select a different analysis group for calculating profitability.

Field or Control	Description
Actual Revenue	Select an analysis group that represents actual revenue when analyzing project profitability. This value appears by default from the Installation Options - Project Costing page, but can be overridden. This value is used to calculate the actual margin.
Actual Cost	Select an analysis group that represents actual cost when analyzing project profitability. This value appears by default from the Installation Options - Project Costing page, but can be overridden. This value is used to calculate the actual margin.
Forecast Revenue	Select an analysis group that represents forecast revenue when analyzing project profitability. This value appears by default from the Installation Options - Project Costing page, but can be overridden. This value is used to calculate the forecast margin.
Forecast Cost	Select an analysis group that represents forecast cost when analyzing project profitability. This value appears by default from the Installation Options - Project Costing page, but can be overridden. This value is used to calculate the forecast margin.

Funds Distribution

The initial value of this field is controlled by the **Group Target Definition** check box on the Project Costing Options page for new projects. In addition, if **Enable Funds Distribution** is not selected on the Installation Integration Options page, then this group box is hidden.

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Field or Control	Description
Group Target Definition	The initial value of this field defaults from the project business unit level. You can override the value set at the business unit level for individual projects on this page. Select to indicate that the funding source rules can be grouped manually. Each target definition can be associated to a set of rules. Deselect to indicate that each funding source rule will be associated with separate target definition.

Related Topics

- Defining Project Options
  To define project options for business units, use the Project Costing Options component (PC_BUS_UNIT_OPT). Use the Project Costing Business Unit Options component interface (PROJECT_BU_OPTIONS) to load data into the tables for this component.
- Application Fundamentals: Installation Options - Project Costing Page

Program Management Page

Use the Program Management page (PROJECT_GEN_02) to define options if you use PeopleSoft Program Management.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Program Management**

See PeopleSoft Program Management: Establishing and Maintaining Programs and Projects.

Project Definitions - Manager Page

Use the Project Definitions - Manager page (PROJECT_MGR) to view and track project managers.

Enter program managers if you use PeopleSoft Program Management.

Navigation:

Project Costing, and then **Project Definitions**, and then **General Information**, and then **Manager**

This example illustrates the fields and controls on the Project Definitions - Manager page. You can find definitions for the fields and controls later on this page.

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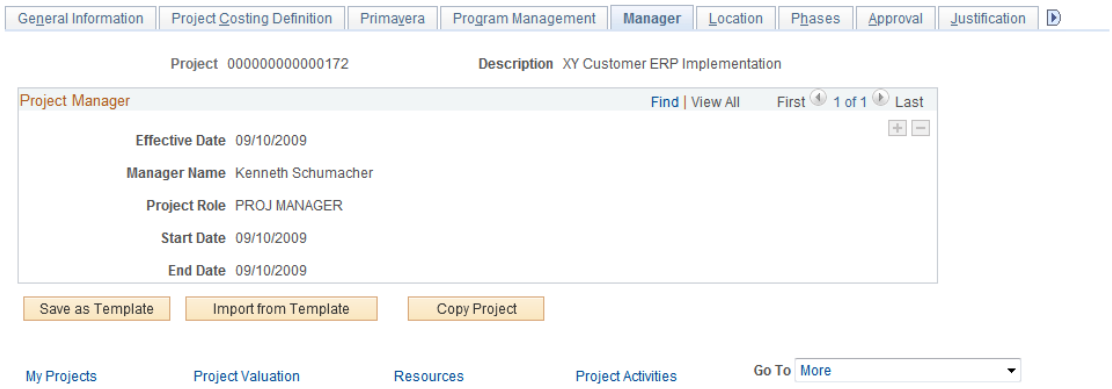

The system adds, modifies, or deletes effective-dated rows on this page in the following way:

- When you designate a resource as a project manager on the Project Definitions - Team Detail page in Project Costing, or on the Resource Detail page in PeopleSoft Program Management, the system adds a row with an effective date that is based on the start date of the selected schedule.
- When you modify the project manager's role or schedule dates in PeopleSoft Project Costing or PeopleSoft Program Management, the system modifies the existing row.
- When you modify the project manager's schedule dates in PeopleSoft Resource Management, the system modifies the existing row.
- When you select the **Project Manager** check box on a different schedule row for the same project manager resource, the system adds a row with an effective date that is based on the start date of the selected schedule row.
- When you delete the project manager resource from the list or deselect the **Project Manager** check box, the system deletes the corresponding project manager row.

You cannot enter or modify project managers on this page. However, if you use PeopleSoft Program Management, you can enter program managers on this page.

See Also, *PeopleTools: PeopleSoft Integration Broker*

Related Topics

- Understanding Team Staffing in PeopleSoft Project Costing
  Project managers can staff a project and its related activities from the Project Definitions - Team page. The Project Definitions - Team page maintains a central view of all project assignments and scheduling. You can assign team members to multiple schedules in a variety of project roles.
- Creating Project and Activity Teams
  To create project and activity teams, use the Project Team component (PROJECT_TEAM1).
- Viewing and Modifying Activity Teams
  To view and modify activity teams, use the Project Activity Team component (PROJ_ACT_TEAM).

Project Definitions - Location Page

Use the Project Definitions - Location page (PROJECT_LOCATION) to assign the physical location of the project.

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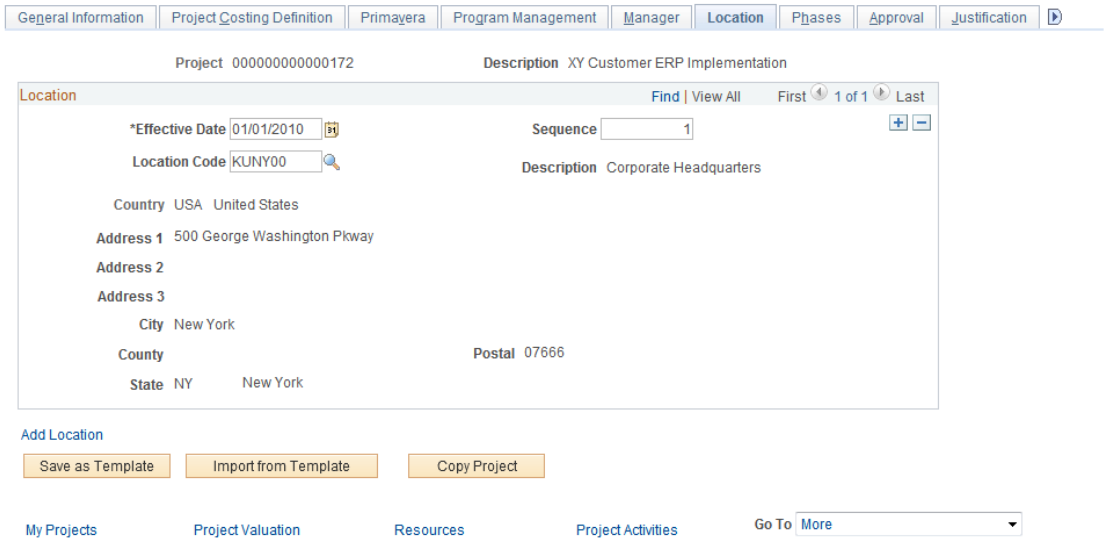
Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Location**

This example illustrates the fields and controls on the Project Definitions - Location page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Location Code	Select a location code that has already been defined in the system. The address for this code appears in the bottom half of the page and cannot be edited.
Add Location	Click to access the Location Definition page, where you can add or modify a location in the Location table (LOCATION_TBL). See Application Fundamentals: Setting Up Locations.

Project Definitions - Phases Page

Use the Project Definitions - Phases page (PROJECT_SCHED) to track time spent on stages of a project.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Phases**

This example illustrates the fields and controls on the Project Definitions - Phases page. You can find definitions for the fields and controls later on this page.

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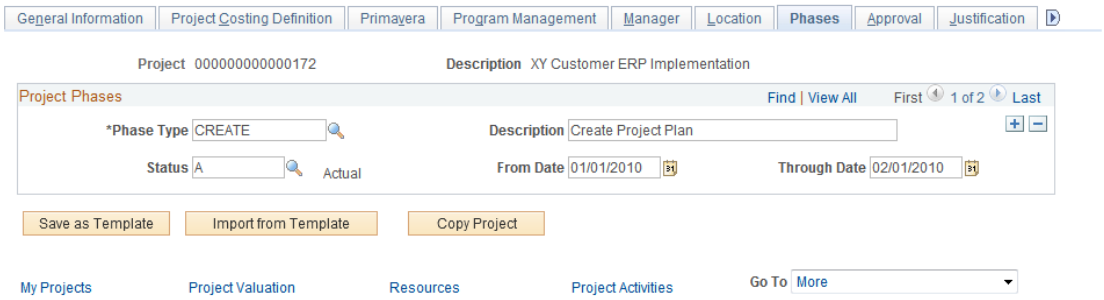

Field or Control	Description
Phase Type	Select a phase type to track the time spent on different stages of a project and, for exception reporting, to view the projects that are on schedule. You define phase types on the Phase Types page. See Phase Types.
Status	Select a phase status of *A* (Actual Schedule) or *E* (Estimated Schedule).

Project Definitions - Approval Page

Use the Project Definitions - Approval page (PROJECT_APPROVAL) to specify which project events require approval, who is authorized to approve the events, and in what order the events must be approved.

Approve a project event or check on approval status.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Approval**

This example illustrates the fields and controls on the Project Definitions - Approval page. You can find definitions for the fields and controls later on this page.

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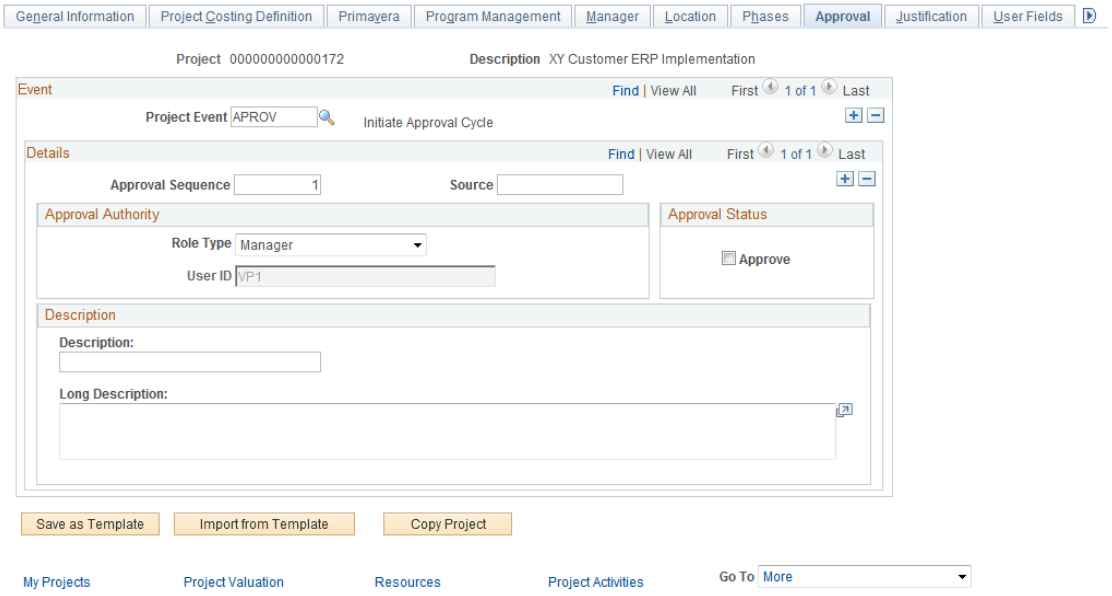

Use the approval sequences that you set up on this page to set up customized workflow processing. For example, when a change in status occurs for which a project event is defined, it can trigger approval workflow that you define for that project event and notify the appropriate people that their approval is required.

Field or Control	Description
Project Event	Select an event to approve, add, or view detailed information. You define project events on the Events page. See Project Events.
Approval Sequence	Enter the order in which the specified approvers must approve the project. You can identify as many approvers as necessary, and you can specify more than one approval with the same approval sequence number for the same project event. If you define two approvals for an approval sequence, such as sequence *1*, both of the approvals must be completed before completing the approval for approval sequence *2*.
Source	Enter the person or department that requires this approval.
Role Type	Select the role that is authorized to approve the event. Available options are: *Manager* or *Approver:* Indicates that anyone assigned that role is authorized to approve the event. *Operator:* Enables you to assign approval authority to a specific person. The **Operator ID** field becomes active when you select this option.

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Field or Control	Description
User ID	Enter an operator ID if you select an option of *Operator* in the **Role Type** field. If you select a role type of *Operator* and leave the **User ID** field blank, anyone assigned the role of operator is authorized to make the approval. If you selected a role type of *Manager* or *Approver*, the **User ID** field displays the operator ID that is logged into the system.
Approve	Select to approve the change in status.

> **Note**
>
> This page is for informational purposes only; it does not actually enforce the Approval Authority functionality described.

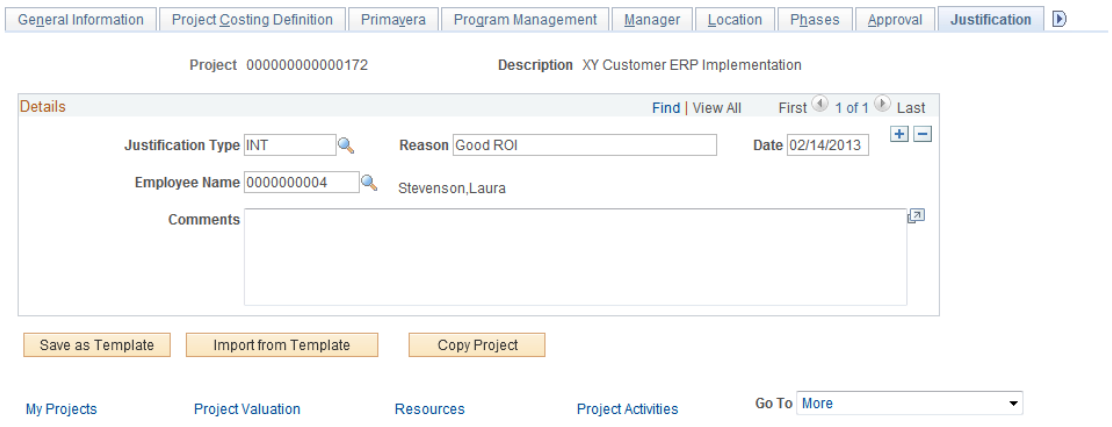
Project Definitions - Justification Page

Use the Project Definitions - Justification page (PROJ_JUSTIFY) to if your company employs an approval cycle for projects, enter a reason for justifying a project-related action.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Justification**

This example illustrates the fields and controls on the Project Definitions - Justification page. You can find definitions for the fields and controls later on this page.



Use this page to provide justification for a project if you use an approval cycle for projects.

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Field or Control	Description
Justification Type	Select from the following justification types: *EXT:* External justification *INT:* Internal justification *IRR:* Internal rate of return *PAY:* Quick payback Available values are based on the translate values in the **Justification Type** field properties.
Reason	Enter a short reason to justify the project.
Employee Name	Select the name of the person submitting the justification.

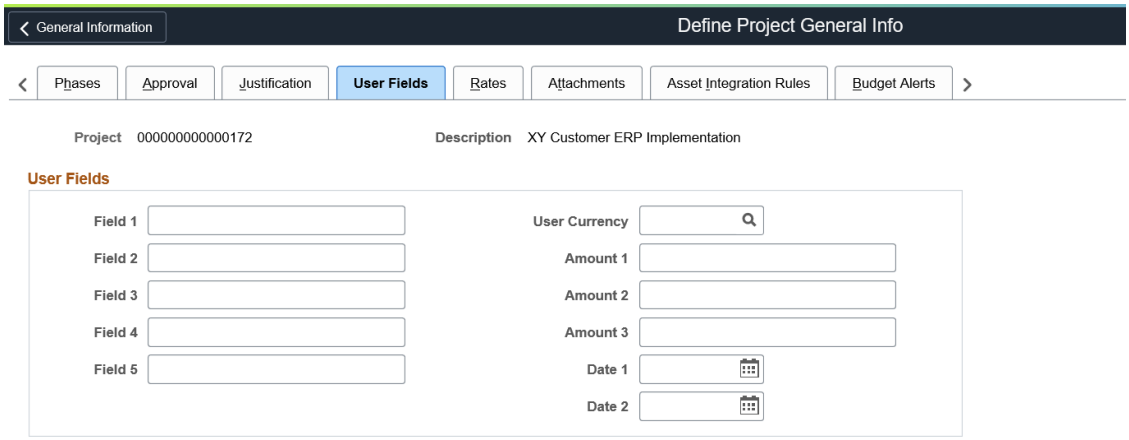
Project Definitions - User Fields Page

Use the Project Definitions - User Fields page (PC_PROJ_USER) to specify additional project information for the organization.

Navigation

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **User Fields**

This example illustrates the fields and controls on the Project Definitions - User Fields page.



Project Definitions - Rates Page

Use the Project Definitions - Rates page (PROJECT_SERVICES) to track billing, costing, and burdening project rates and view contracts integration information that is associated with a project.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Rates**

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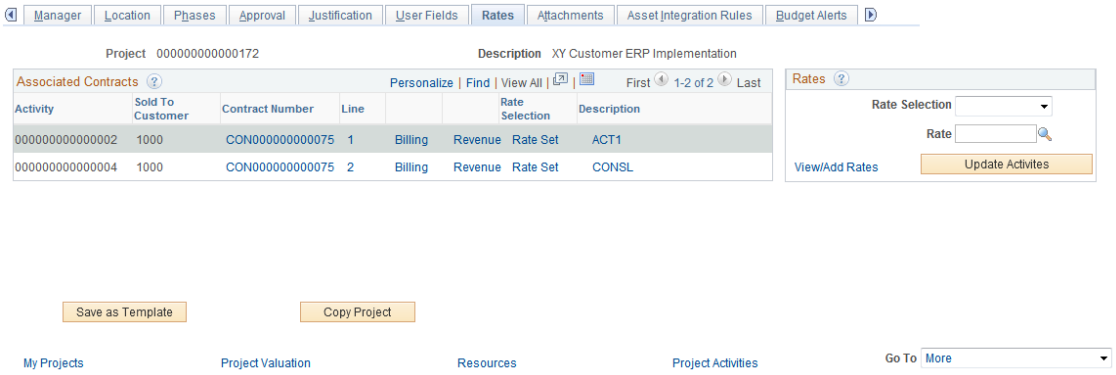
This example illustrates the fields and controls on the Project Definitions - Rates page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Rate Selection and **Rate**	Select *Rate Set* or *Rate Plan* and select the rate that the system uses as default rates for pricing cost transactions for activities that belong to this project. The system automatically attaches the project's rate selection to the new activities that you create for the project. You can override the default rate set or rate plan at the activity level. The default value for the project rate selection is based on the default rate set or rate plan that is specified for the project type and business unit combination. The system also assigns a default rate selection if you enter a project type for an existing project and these conditions exist: • The project had no previous project type or default rate set attached to it. • The project type has a default rate set specified for the business unit. You can enter a new default rate selection. Available values are based on rate sets or plans that are valid for the business unit and are active on the current date. See Defining Rate Set Categories, Rate Sets, and Rate Plans.
View/Add Rates	Click to access the Rate Sets page to view, modify, or create a rate set.

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Field or Control	Description
Update Activities	Click to update all project activities with the rate selection that appears in the **Rate** field. This action adds a new effective-dated row to the database with the current effective date activity rate set or rate plan. If the activity already has a rate set associated with the current date, the system replaces the row in the database. If an activity did not previously have a rate selection, and the activity start date is earlier than the current date, a gap will exist between the activity start date and the start of the rate association. After you click the **Update Activities** button, a message appears indicating the status of updated activities. **Note:** This action immediately saves the changes to project activities. You cannot cancel the action after you click the **Update Activities** button.
Labor % (labor percentage)	Displays the labor adjustment percentage that the Pricing process uses to calculate new rows for projects that are created from proposals in PeopleSoft Proposal Management if the rate option is *AML* (Mark Up/Mark Down Labor). This field appears only if you use PeopleSoft Proposal Management.
Non-Labor % (nonlabor percentage)	Displays the nonlabor adjustment percentage that the Pricing process uses to calculate new rows for projects that are created from proposals in PeopleSoft Proposal Management if the rate option is *AMN* (Mark Up/Mark Down Nonlabor). This field appears only if you use PeopleSoft Proposal Management.

Related Topics

- Understanding the Pricing Process
  This topic discusses:
- Understanding Variance Pricing
  This topic discusses:

Project Definitions - Attachments Page

Use the Project Definitions - Attachments page (PROJECT_DOC_01) to attach, view, and delete project-related files.

Navigation:

Project Costing, and then **Project Definitions**, and then **Define Project General Info**, and then **Attachments**

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> **Note**
>
> You must define an FTP server if you want to attach files to projects and activities.

See *PeopleSoft Enterprise Financials, ESA and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's My Oracle Support website.

Field or Control	Description
	Click the **Add Attachment** icon to browse to the file that you want to attach, and then click *Upload.* The system copies the file to the server where your project information resides. If other documents already appear in the **Document Attachments** grid, add a row to make the **Add Attachment** icon appear again.
	Click the **Delete Attachment** icon to remove an attachment from the grid.
	Click the **View Attachment** icon to view an attachment.

Initiating Projects by Using Project Initiation Checklists

Pages Used to Initiate Projects by Using Project Initiation Checklists

Page Name	Definition Name	Usage
Project Initiation Checklist Page	PC_PIC_CHKLST	View the steps required to set up, initiate, and track a project.
Project Initiation Checklist - Step Explanation Page	PC_PIC_EXPLANATION	Enter specifics about the required tasks for a project step.
Project Initiation Checklist - Step Notes Page	PC_PIC_NOTES	Enter notes as the project team progresses through this step. Multiple people can enter notes about a project step.
Project Initiation Checklist - Define Additional Steps Page	PC_PIC_ADD_STEP	Create new project steps that are specific to this project and add them to the Project Initiation Checklist page.

Prerequisite

Because checklists are keyed by project ID, you must create a project before you can activate the checklist.

Project Initiation Checklist Page

Use the Project Initiation Checklist page (PC_PIC_CHKLST) to view the steps required to set up, initiate, and track a project.

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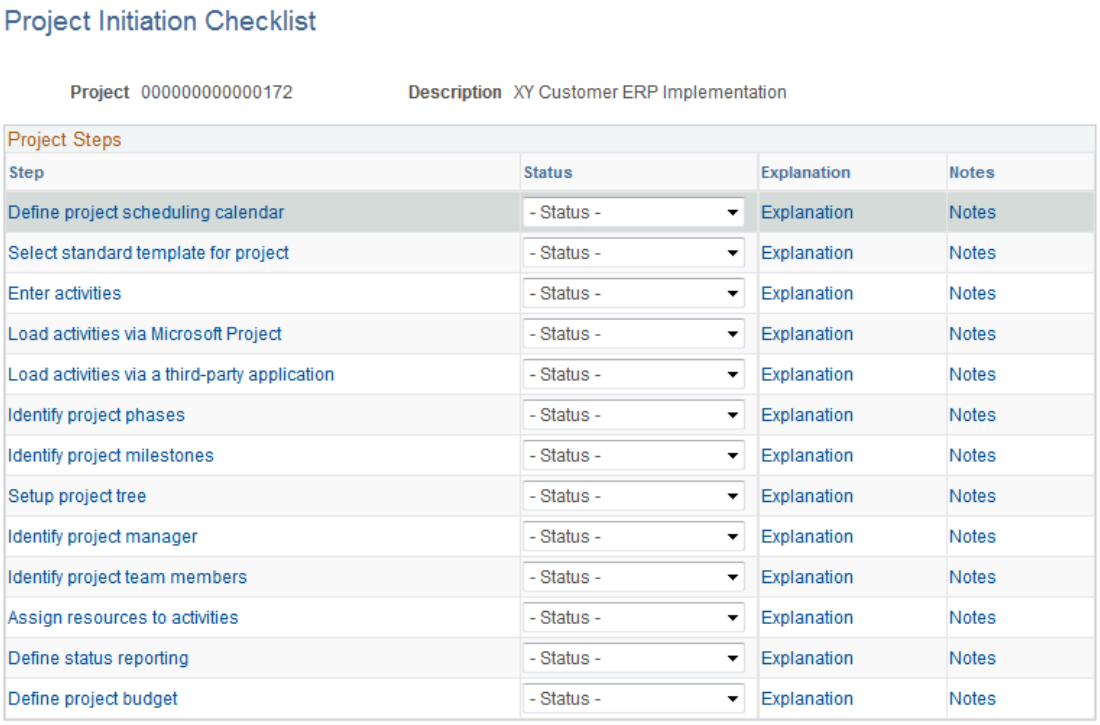
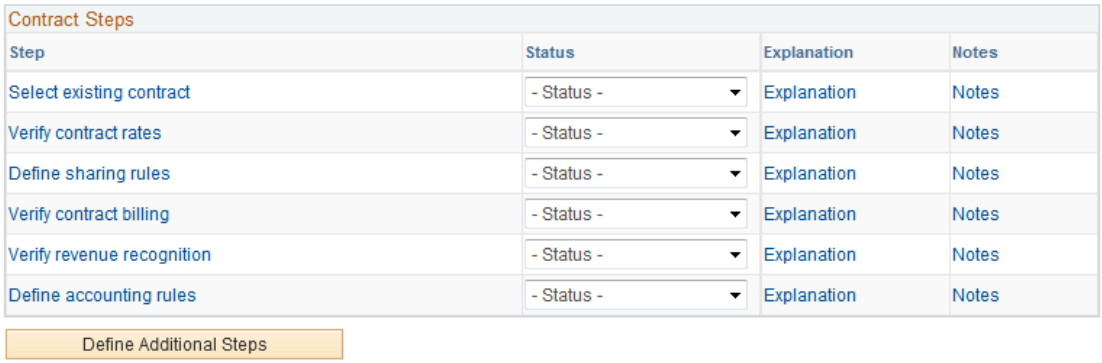
Navigation:

Project Costing, and then **Project Definitions**, and then **Project Initiation Checklist**, and then **Project Initiation Checklist**

This example illustrates the fields and controls on the Project Initiation Checklist page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Project Initiation Checklist page (2 of 2). You can find definitions for the fields and controls later on this page.



This page provides a series of links that access the appropriate components in Project Costing, where each step of a project is implemented. Project managers can change the status of each step so that the checklist becomes an overall picture of the project's progress.

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Project Steps

Field or Control	Description
Explanation	Click the link to access the Project Initiation Checklist - Step Explanation page for the corresponding step and view the purpose and tasks for each step. You cannot edit fields on the Step Explanation page.
Notes	Click the link to access the Project Initiation Checklist - Step Notes page and enter notes for the corresponding step.
Define Additional Steps	Click to access the Project Initiation Checklist - Define Additional Steps page, where project managers can create steps and add them to the checklist.

> **Note**
>
> The **Define project scheduling calendar** and **Define status reporting** links are functional only if you use PeopleSoft Program Management.

Contract Steps

Contract steps appear for you to access if you use PeopleSoft Contracts.

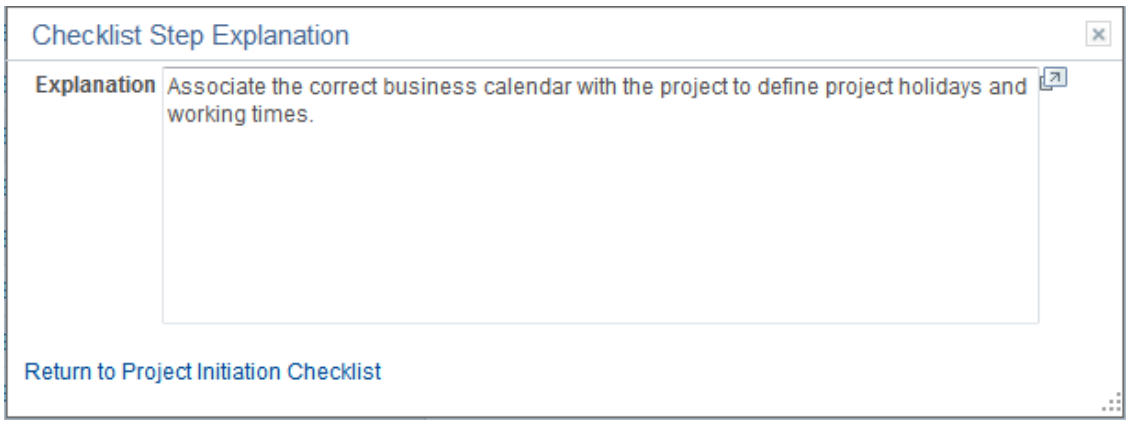
Project Initiation Checklist - Step Explanation Page

Use the Project Initiation Checklist - Step Explanation page (PC_PIC_EXPLANATION) to enter specifics about the required tasks for a project step.

Navigation:

Click the **Explanation** link on the Project Initiation Checklist page.

This example illustrates the fields and controls on the Project Initiation Checklist - Step Explanation page. You can find definitions for the fields and controls later on this page.



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This page displays more detailed information about the requirements to complete this project step.

You cannot modify the explanation for steps that are delivered with Project Costing. You can, however, enter new explanations when you define your own additional steps.

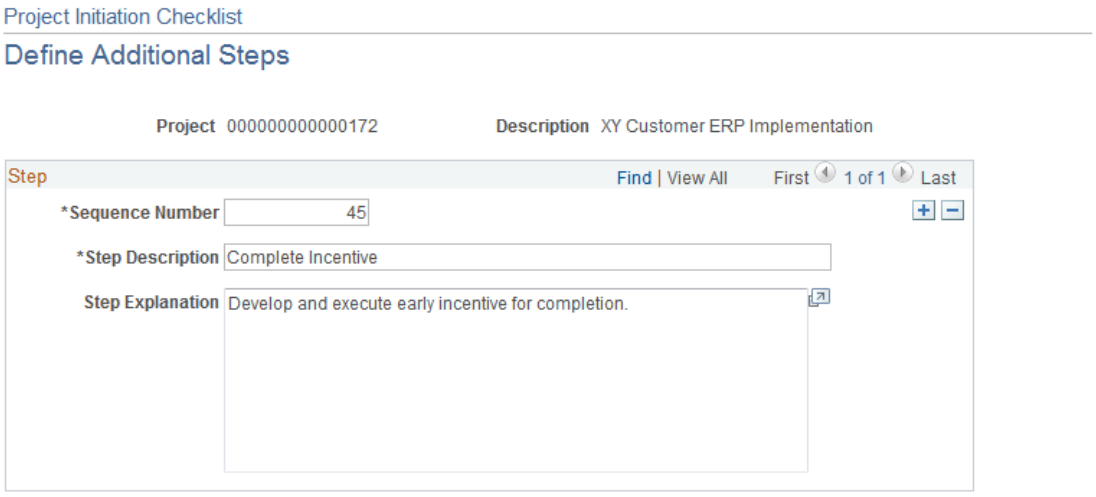
Project Initiation Checklist - Define Additional Steps Page

Use the Project Initiation Checklist - Define Additional Steps page (PC_PIC_ADD_STEP) to create new project steps that are specific to this project and add them to the Project Initiation Checklist page.

Navigation:

Click the **Define Additional Steps** button on the Project Initiation Checklist page.

This example illustrates the fields and controls on the Project Initiation Checklist - Define Additional Steps page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Sequence Number	Enter or modify the sequence in which the step appears in ascending order in the **Additional Steps** grid of the Project Initiation Checklist. This information appears on the Project Initiation Checklist - Step Explanation page.
Step Description	Enter or modify the name of the step that appears in the **Additional Steps** grid on the Project Initiation Checklist page.
Step Explanation	Enter or modify the explanation that appears on the Project Initiation Checklist - Step Explanation page when you click the **Explanation** link for the step on the Project Initiation Checklist page.

When you save the data, the Project Initiation Checklist displays an **Additional Steps** grid that lists steps that you create. You can modify fields that define an additional step.

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> **Note**
>
> Additional steps are specific to the Project Initiation Checklist only for the selected business unit and project.

Maintaining Project Status

Page Used to Maintain Project Status

Page Name	Definition Name	Usage
Project Definitions - Status Page	PROJECT_STATUS	Assign the project status. This page operates in deferred processing mode and is not available for project templates.

Project Definitions - Status Page

Use the Project Definitions - Status page (PROJECT_STATUS) to assign the project status.

This page operates in deferred processing mode and is not available for project templates.

> **Note**
>
> The ability to correct the Status field on the first effective dated row depends on whether Project Status paths are in use. If the Use Status Path check box is selected on the Project Types page, then the Status field on the initial effective dated row cannot be adjusted through correction mode. If not selected, then all fields can be adjusted through correction.

Navigation:

Project Costing, and then **Project Definitions**, and then **Update Project Status**

This example illustrates the fields and controls on the Project Definitions - Status page. You can find definitions for the fields and controls later on this page.

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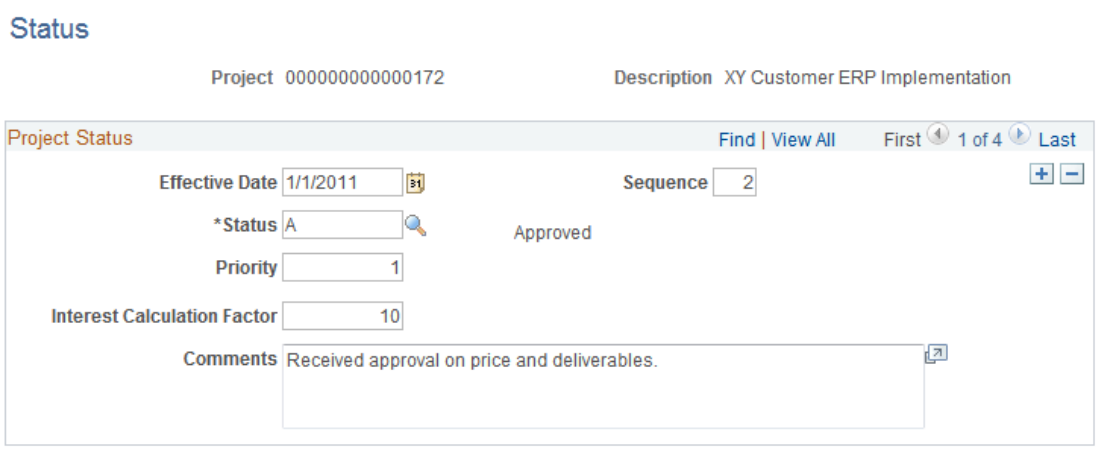

Field or Control	Description
Sequence	The system increments the sequence number, which tracks incremental changes in status. By using a sequence number in combination with the status effective date, the system can make multiple status changes on the same day.
Status	Select the project status and assign a status effective date. Available options are based on the values that you enter on the Status Types page during implementation. If you use project type status paths, the only available status types are based on the current status of the project. See Project Type Status Paths. When you change the project status on this page, the system automatically sends an email notification to each team member for which an email address exists on the Project Definitions - Team Detail page with the **Email Notify for Status Change** option selected. See Project Definitions - Team Detail Page.
Priority	Enter the project priority. This field is for information only.
Interest Calculation Factor	Enter the percent that the system uses to calculate the amount of interest for this project based on the project status. For example, enter *1* to calculate 100 percent interest for the project when it is *Open.* Enter *0.5* to calculate 50 percent interest when the project is *In Service.* This field is available if you select the **Allow Interest Calculation** option on the Project Costing Definition page. See Setting Up and Processing Interest Calculations.

Create a new transaction for each status change to maintain a history of the project. For example, assign a project status of *Proposed* when the project is first proposed. When the project passes the review cycle and is accepted, change the status to *Open.*

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To assign status changes in advance, create new transactions and assign the appropriate future effective date for each status change. Alternatively, manually change the project status if you do not want to change the status in advance.

Tracking Your Projects

Pages Used to Track Your Projects

Page Name	Definition Name	Usage
My Projects Page	PC_MYPROJECT_PNL	Provide users with a modifiable list of all their projects. This page operates in deferred processing mode.
Projects List Page	PC_MYPROJ_ADD_PNL	Search for a list of existing projects and add selected projects to your My Projects page.
Project Milestones Page	CA_PROJ_MLS	Search and view projects that have activities designated as project milestones that meet selected search criteria. Navigate to details of contracts that are tied to the project milestone.
Populate My Projects Page	RUN_PC_MY_PRJ	Run the Auto Populate process.

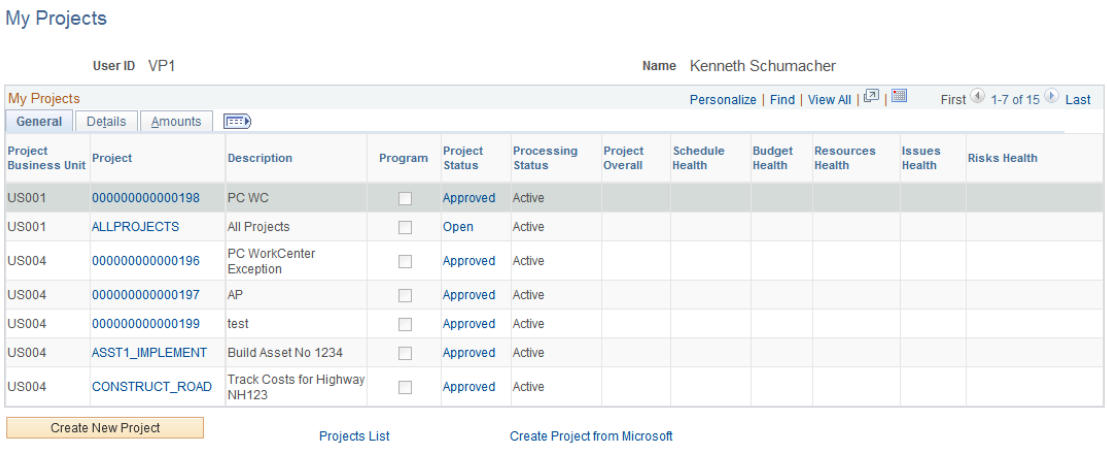
My Projects Page

Use the My Projects page (PC_MYPROJECT_PNL) to provide users with a modifiable list of all their projects. This page operates in deferred processing mode.

Navigation:

Project Costing, and then **My Projects**, and then **My Projects**

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



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General

Field or Control	Description
Project	Click a project link to access the Project Definitions - General Information page for more information about a specific project.
Program	Displays a check mark if the project is a program or summary project.
Project Status	Click to access the Project Definitions - Status page to view or modify the project status.
Processing Status	Displays the processing status that corresponds to the project status value.
Project Health Indicators	Displays visual indicators that represent the project's health in various areas of the business. If you use PeopleSoft Project Costing without PeopleSoft Program Management, the **Project Overall** column appears. If you use PeopleSoft Program Management, additional project health columns appear for **Schedule Health, Budget Health, Resources Health, Issues Health,** and **Risks Health.** See PeopleSoft Program Management: Health Options Page.
	Displays a visual indicator in a project health column that this measure of project health is good.
	Displays a visual indicator in a project health column that this measure of project health is fair.
	Displays a visual indicator in a project health column that this measure of project health is poor.
Create New Project	Click to create a new project on the Project Definitions - General Information page.
Projects List	Click to access the Projects List page and search for projects to add to the My Projects page. The Projects List page opens as a modal window.
Create Project from Microsoft	Click to access the Create Project from Microsoft page to create a project in Project Costing from Microsoft Project data. See Creating PeopleSoft Projects from Microsoft Projects.

Details

Field or Control	Description
Release, Category, Application Area, and **Application**	These columns appear in the **Details** grid if you use PeopleSoft Program Management. See PeopleSoft Program Management: Setting Up General Control Data.

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Field or Control	Description
	Click the **Drill to Project Activities** icon to access the Project Activities page for the corresponding project.
	Click the **Drill to Resources by Activity** icon to access the Project Definitions - Team page for the corresponding project. If you use PeopleSoft Program Management, this icon accesses the Resources page.
	Click the **Drill to Program Details** icon to access the Review Program page for the corresponding program. This icon appears for programs only if you use PeopleSoft Program Management.
	Click the **Link to Project Request** icon to access the Project Request page for the corresponding project. This icon appears only if you use PeopleSoft Program Management.

Amounts

Field or Control	Description
Total Issues, Total Deliverables, and **Total Risks**	These columns appear in the **Amounts** grid if you use PeopleSoft Program Management. See PeopleSoft Program Management: Setting Up General Control Data. See PeopleSoft Program Management: Defining and Reviewing Deliverables.
	Click the **Drill to Project Valuation** icon to access the Project Valuation page for the corresponding project.
	Click the **Project Budgets** icon to access the Budget Plan page for the corresponding project.
	Click the **Manager Transactions Review** icon to access the Manager Transaction Review page for the corresponding project.
	Click the **View Earned Value Projection** icon to access the Earned Value Projection page for the corresponding project. This icon appears only if you use PeopleSoft Program Management.

Projects List Page

Use the Projects List page (PC_MYPROJ_ADD_PNL) to search for a list of existing projects and add selected projects to your My Projects page.

Navigation:

Project Costing, and then **Project Definitions**, and then **Review Projects List**

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

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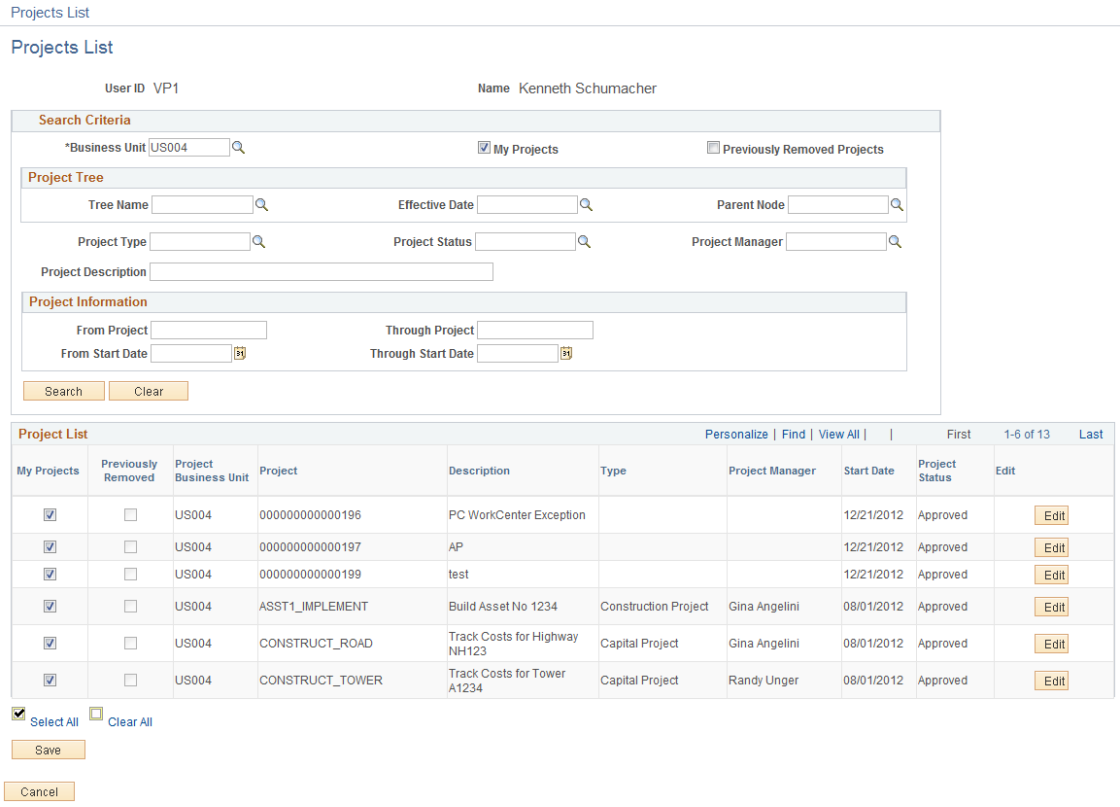

When accessing this page, the system enforces project security. If projects security is being use by your organization, then the Projects List section only shows projects for which the user is authorized to view. For additional information about Project Security, see Understanding Project Security.

The appearance of this page is display-only when *Auto Populate* is selected in the *My Projects Setup* field on the Application Fundamentals: Installation Options - Project Costing Page:

Search Criteria

Use this section to enter search criteria and populate the Project List section. If the search returns more than 50 projects, and you select more than 50 projects to add to your project list, then a warning appears when you click the Save button. For better performance, Oracle's PeopleSoft recommends adding no more than 50 projects to your project list.

All fields in this section are *And* conditions except the **My Projects** and **Previously Removed Projects** check boxes, which are *Or* conditions. Both check boxes can be selected.

Field or Control	Description
My Projects	Select to indicate that you want the system to show projects that are currently on your project list.
Previously Removed Projects	Select to indicate that you want the system to display projects that you have previously removed. This option is displayed only when *Auto Populate, Allow Override* is selected in the *My Projects Setup* field on the Installation Options - Project Costing page.

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Project List

Use this section to select projects and add them your My Projects Page.

Project templates are not shown in the projects list.

Field or Control	Description
My Projects	Select to indicate that you want to add the project to your My Projects page. This is performed when you click the Save button.
Previously Removed	Displays as selected if the project was previously removed from your projects list. You can add the project back to your projects list by selecting the check box in the My Projects column. This option is displayed only when *Auto Populate, Allow Override* is selected in the *My Projects Setup* field on the Installation Options - Project Costing page.

Project Milestones Page

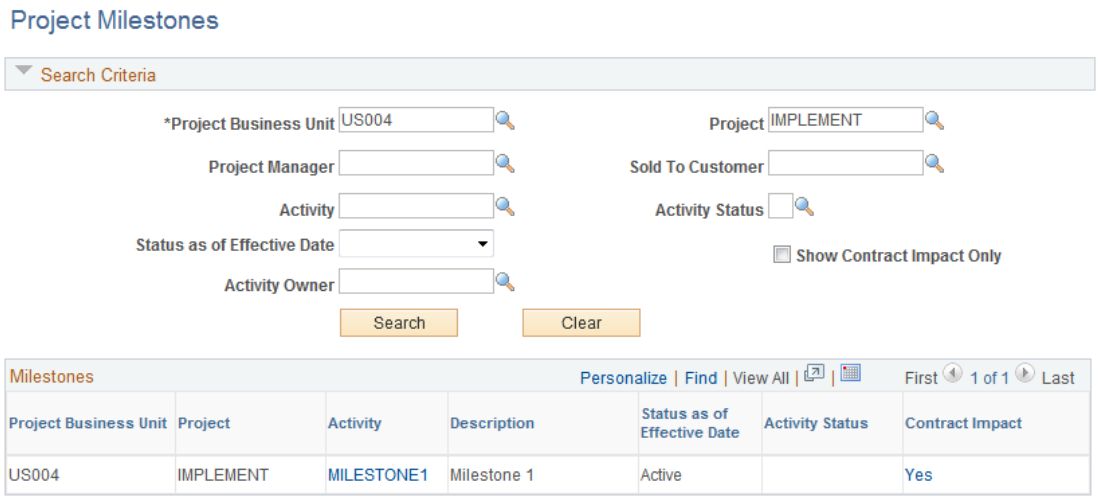
Use the Project Milestones page (CA_PROJ_MLS) to search and view projects that have activities designated as project milestones that meet selected search criteria.

Navigate to details of contracts that are tied to the project milestone.

Navigation:

Project Costing, and then **Project Definitions**, and then **Project Milestones**, and then **Project Milestones**

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



You designate project milestones by selecting the **New Milestone** option on the Activity Definitions - Definition page.

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To filter search results, enter values in the fields in the **Search Criteria** group box. You must enter a business unit. If you leave all other fields blank, the search returns all project milestones for the business unit.

Search Criteria

Field or Control	Description
Show Contract Impact Only	Select to return search results for project milestones attached to contract billing plans, revenue, plans, or contract milestones only. These milestones are used in PeopleSoft Contracts to tie billing and recognizing revenue to reaching a milestone.

Milestones

Field or Control	Description
Activity	Click to access the Activity Definitions - General Information page, where you can review details of the activity associated with this milestone.
Status as of Effective Date	Displays the effective date of the activity status. Values include *Active* and *Inactive.*
Contract Impact	Displays whether this milestone is associated with any contract lines. Values include *Yes* and *No*. When the project milestone is referenced in a billing plan, revenue plan, or contract milestone, *Yes* appears in this field. Click the **Yes** link to access the Impacted Contract Details page in PeopleSoft Contracts. See PeopleSoft Contracts: Impacted Contracts Details Page.

Related Topics

- PeopleSoft Contracts: Understanding Milestones
- PeopleSoft Contracts: Setting Up Milestones
- PeopleSoft Contracts: Maintaining Milestones
- PeopleSoft Contracts: Processing Milestones
- PeopleSoft Contracts: Reviewing Project Milestones

Populate My Projects Page

Use the Populate My Projects page (RUN_PC_MY_PRJ) to run the Auto Populate process.

Navigation:

Project Costing, and then **Utilities**, and then **Populate My Projects**

This example illustrates the fields and controls on the Populate My Projects Page.

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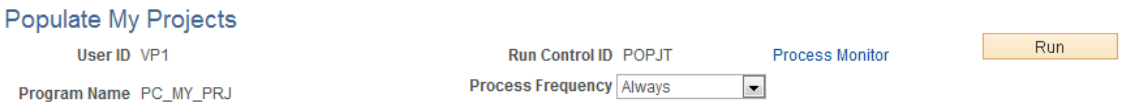

This page is only applicable when *Auto Populate* or *Auto Populate, Allow Override* is selected in the *My Projects Setup* field on the Application Fundamentals: Installation Options - Project Costing Page. Use this process to automatically update the My Projects page for all Project Costing users based on the Default Auto Population Options at the installation level or the My Projects Options at the user preferences level.

Modifying Existing Projects by Using Templates

Page Used to Modify Existing Projects by Using Templates

Page Name	Definition Name	Usage
Import from Template Page	PC_IMPFRM_TMPL	Import data from a template into an existing active or pending transactional project.

Import from Template Page

Use the Import from Template page (PC_IMPFRM_TMPL) to import data from a template into an existing active or pending transactional project.

Navigation:

You can access the Import from Template page through multiple navigation paths. This list presents five frequently used paths.

- **Project Costing**, and then **Project Definitions**, and then **Define Project General Info**

  Click **Import from Template** on any Project General component page for a pending project.
- **Project Costing**, and then **Project Definitions**, and then **Manage Project Team**

  Click **Import from Template** on the Project Definitions - Team page for an active or pending project.
- **Program Management**, and then **Project Definitions**, and then **Project Definition Resources**

  Click **Import from Template** on the Resources page for an active or pending project.
- **Project Costing**, and then **Activity Definitions**, and then **Define Project Activities**

  Click **Import from Template** on the Project Activities page for a pending project.

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

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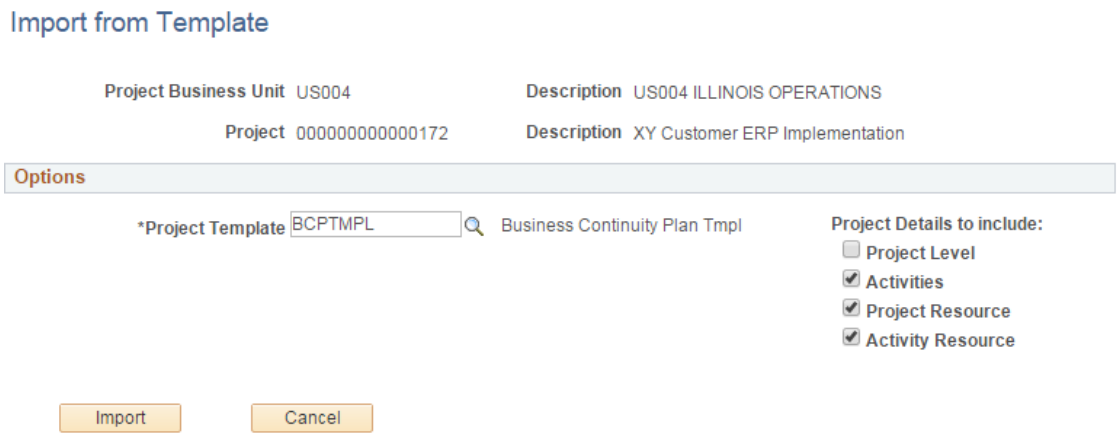

The project business unit and currency must be the same for the template and the transactional project.

Field or Control	Description
Project Template	Select the template that contains data that you want to import into the open project. The list of available templates is based on the business unit's public templates and user-specific private templates.
Project Level	Select to import project-level information, including attachments, from the template into the open project. This option is available only for pending projects. The system overwrites all project-level data, except the project start date, project ID, and description. The system retains the open project start date and uses it to calculate dates on the open project. The system calculates the new project and activity start and end dates by using the new project start date, the date ranges in the template, and the relationship of the dates to the template project start date, to calculate: • The project end date. • Activity start and end dates. • Project team-planned start and end dates. • Assignment schedule start and end dates. If you use PeopleSoft Program Management, the system also uses the open project start date to calculate activity-deliverable due dates and deadlines. **Note:** If the date range for the activities or project team from the template are outside of the open project end date, the system adjusts the open project end date accordingly. A message appears when you select this option to remind you that project-level data will be overwritten in the open project.

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Field or Control	Description
Activities	Select to append the activities from the template to existing project activities on the open project. This option is available only for pending projects. Activity information includes the WBS and activity attachments. If you use PeopleSoft Program Management, the imported information also includes dependencies and deliverables. If a duplicate activity ID exists on the template and open project, a message appears when you click **Import** stating that the duplicate template activity ID will use the next sequential activity ID in the project.
Project Resource	Select to append all active project resources from the template to the open project. If a duplicate resource ID exists, a message appears when you click **Import** stating that the duplicate template resource ID is not imported into the open project. The system imports only active resources. If the template contains inactive resources, a message appears when you click **Import** stating that one or more of the resources from the template are no longer active and are not added to the open project.
Activity Resource	Select to append activity resources from the template into the open project. This option is available if you select the **Activities** and **Project Resource** options, and only for pending projects.
Import	Click to import the selected information from the template and open the Project Definitions - General Information page for the target project.

You can change project data that you import from the template.

Deleting Project Data

Pages Used to Delete Project Data

Page Name	Definition Name	Usage
Project Delete Utility Page	PC_DEL_OPTN_PAGE	Delete projects, activities, and transactions. This page operates in deferred processing mode.
Review Project Delete Log Page	PC_DEL_RESL_PAGE	View the result of the Project Delete utility run on this page. View deletion activity for a specified business unit and project.

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Page Name	Definition Name	Usage
Delete Utility Exceptions	PC_DEL_EXC_PAGE	View details of project deletions that were not completed as specified on the Project Delete page. To access this page, click **Exceptions** on the Review Project Delete Log page.

Prerequisite

You must establish business unit parameters on the Delete Utility Tables Pagebefore using the Project Delete utility.

Project Delete Utility Page

Use the Project Delete Utility page (PC_DEL_OPTN_PAGE) to delete projects, activities, and transactions.

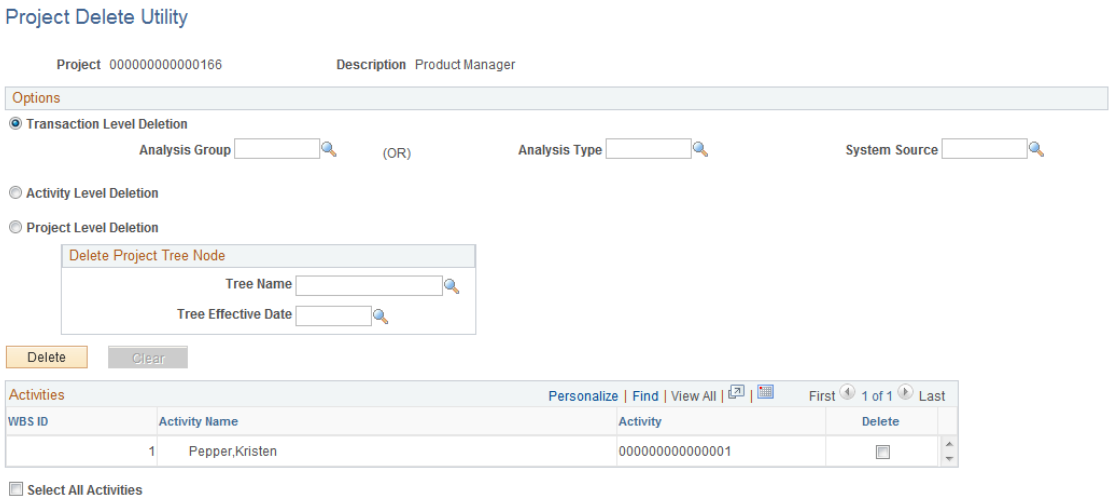
This page operates in deferred processing mode.

Navigation:

Project Costing, and then **Utilities**, and then **Project Delete Utility**, and then **Project Delete Utility**

> **Warning**
>
> Deleted project data, including transaction rows, are not copied or saved anywhere. Because project deletions are permanent and irreversible, use caution when using the Project Delete utility.

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



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> **Note**
>
> Data that you delete from the Project Transaction table in the FMS database is not deleted from the HCM database. This ensures that time and labor transactions are still accessible in HCM for projects that you delete from the Project Transaction table.

Transaction-Level Deletions

To delete transactions:

1. Select **Transaction Level Deletion.**
2. To delete transactions based on an analysis group, select a group that contains the analysis types that identify the kind of transactions to delete from the Project Transaction table.

   The available analysis groups are defined on the Delete Utility Tables page for the business unit.

   Select an analysis type to delete transactions based on a single analysis type.

   You must enter a value in the **Analysis Group** field or in the **Analysis Type** field for transaction-level deletions. After selecting an analysis group or analysis type, optionally use the **System Source** field to further define the rows to delete.
3. In the **Activities** grid, select the **Delete** check box for each activity that has transactions of the specified analysis group that you want to delete.

   To delete all transactions of the specified analysis group from all of the project's activities, select **Delete** in all activity rows, or **Select All Activities.**
4. Click the **Delete** button to delete transactions that belong to the specified analysis group and are assigned to the selected project activities.

> **Note**
>
> You can use the Project Delete utility to delete all transactions belonging to an analysis group or an analysis type. You cannot use the utility to delete an individual transaction. To delete an individual transaction, use the Transaction Adjustment page to create another transaction that offsets the amount of the transaction that you want to delete.

You can purge transactions from the Project Transaction table without purging the corresponding projects-related data from feeder systems, such as PeopleSoft Asset Management, Contracts, and Payables.

Activity-Level Deletions

To delete activities from a project:

1. Select **Activity Level Deletion.**
2. In the **Activities** grid, select the **Delete** check box for each activity that you want to delete.

   To delete all activities, select the **Select All Activities** check box. When you delete an activity, the system also deletes all transactions that are assigned to the activity.
3. Click the **Delete** button.

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A warning message appears if a transaction row exists for any of the activities that you want to delete. The project delete options on the Delete Utility Tables page determine whether you can delete the activity and transactions.

Project-Level Deletions

To delete a project:

1. Select **Project Level Deletion.**
2. Click **Delete.**

A warning message appears if a transaction row exists for any of the activities that you want to delete. When you delete a project, the system also deletes all activities and subsequent transactions that are assigned to the project. The project delete options on the Delete Utility Tables page determine whether you can delete the project, activities, and transactions. The system deletes corresponding rows from the tables that are specified in the **Project Records** grid on the Delete Utility Tables page.

Projects that you delete no longer appear on your My Projects page.

Project Tree Node Deletions

You can delete a project tree node if the **Delete Project Tree Node** option is selected on the Delete Utility Tables page for the business unit.

To simultaneously delete a project and its corresponding project tree node:

1. Select **Project Level Deletion.**
2. Enter the tree name and tree effective date in the **Delete Project Tree Node** group box.
3. Click **Delete.**

Related Topics

- Viewing and Adding Transactions
- Processing Multiple Currencies
- Controlling Incoming Transactions
  You can control the entry of transactions into Project Costing by using the processing status or status control options.

Review Project Delete Log Page

Use the Review Project Delete Log page (PC_DEL_RESL_PAGE) to View the result of the Project Delete utility run on this page. View deletion activity for a specified business unit and project.

This page operates in deferred processing mode.

Navigation:

Project Costing, and then **Utilities**, and then **Review Project Delete Log**, and then **Review Project Delete Log.**

Field or Control	Description
Delete	Select this check box and click **Refresh** to remove the corresponding row from the **Run Results** grid.

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Field or Control	Description
Instance	Displays the process instance number assigned by PeopleSoft Process Scheduler if the deletion request is triggered as a part of finalizing budgets or integrating with Microsoft Project. A blank **Instance** field indicates that the deletion request was processed in real time by using online pages.
Proj Cnt (project count), **Act Cnt** (activity count), and **Trans Cnt** (transaction count)	Displays the number of projects, activities, and transactions, respectively, that were deleted based on your delete request.
Exceptions	Click to access the Delete Utility Exceptions page to view a list of objects that were not deleted in the request due to the existence of transaction rows that you cannot delete based on project delete options for the business unit.

Maintaining Projects Using the Contracts Workbench

Page Used to Maintain Projects Using the Contracts Workbench

Page Name	Definition Name	Usage
Contracts Workbench Page	CONTRACTS	Maintain PeopleSoft contracts, grants, and projects data. See PeopleSoft Contracts: Analyzing Contracts Data, Grants Data, and Project Costing Data Using the Contracts Workbench and PeopleSoft Contracts: Using the Contracts Workbench

Using the Fluid User Interface for Projects

This topic discusses how to navigate through Projects navigation collection using the PeopleSoft Fluid User Interface. Users can perform various tasks such as view project requests, define project details, and review project activity.

Pages Used to View Projects Using the Fluid User Interface

Page Name	Definition Name	Usage
Projects Tile	NA	Access a collection of Projects components

Projects Tile

Use the Projects tile to access a collection of projects components.

Navigation:

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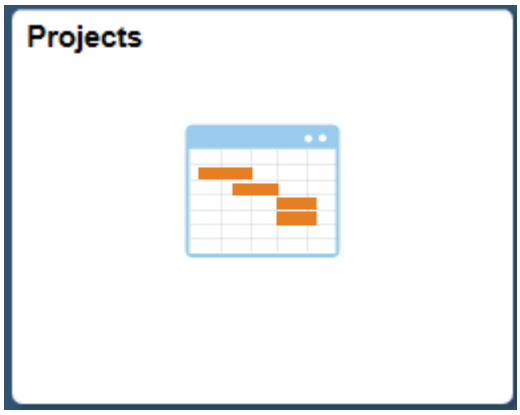
Fluid Home, and then **Project Management**, and then **Projects**

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

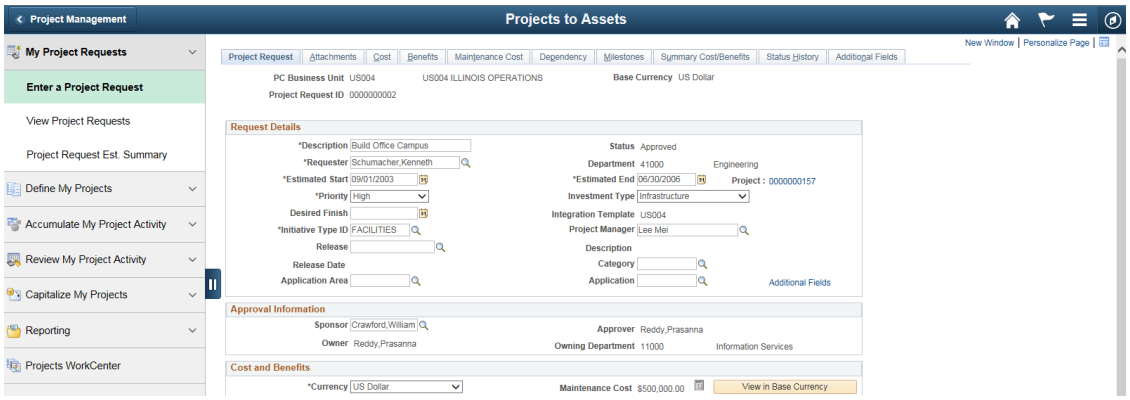


Click the Projects tile to access the projects navigation collection.

Projects Page

Use the projects navigation collection to access various projects components.

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



This navigation collection enables users to access frequently-used projects components from a single location. The left panel of this page lists all the collected components in the following categories:

- My Project Requests
- Define My Projects
- Accumulate My Project Activity
- Review My Project Activity
- Capitalize My Projects

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- Reporting
- Projects WorkCenter

The right pane displays the component details that is selected on the left panel.

Creating Project Requests Using PeopleSoft Fluid User Interface

The Project Request activity guide provides a list of sequential tasks that need to be completed by the requester to create new projects and activities.

Use the Project Request activity guide template to setup the activity guide. For additional information on developing and deploying Activity Guides, see *PeopleTools: Portal Technology*.

Page Name	Definition Name	Usage
View Project Request Page	PTS_NUI_SEARCH	To view existing project requests or create a new request.
Project Request - Questionnaire Page	PTAI_TMPLQUESPGNUI	To launch the activity guide. Answers to the questions on this page determine the tasks displayed in the activity guide.
Project Request Activity Guide Step 1 of 4: Questionnaire	EOQF_QSTNR_PRVW_FL	Configurable by the customer in the Questionnaire Framework, these questions provide additional detail about the request.
Project Request Activity Guide Step 2 of 4: Project Request	PC_PRQ_PROJ1_FL	To enter information related to the project.
Project Request Activity Guide Step 3 of 4: Project Activity	PC_PRQ_PROJACT2_FL	To enter information related to project activities.
Project Request Activity Guide Step 4 of 4: Project Team	PC_PRQ_PRJTM_FL	To enter information related to the project team.

Project Request Tile

Use the Project Request tile to access the View Project Request page and view existing project requests or create a new project request.

Navigation:

The Project Request tile is delivered as part of the Project Management home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Project Request tile

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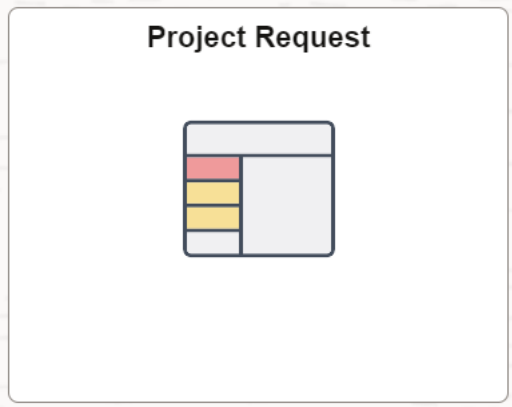


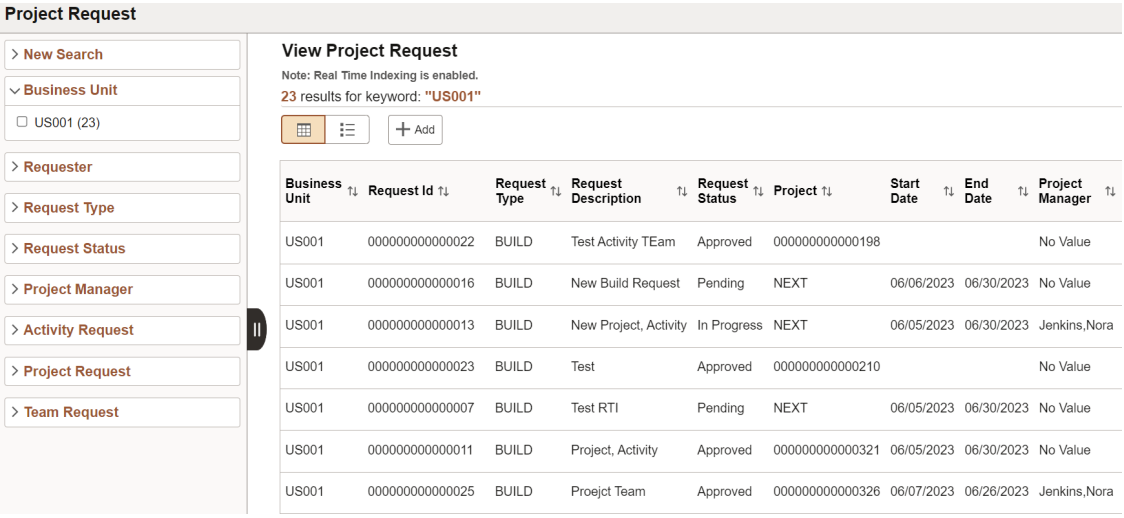
View Project Request Page

View Project Request Page to view existing project requests or create a new request.

Navigation:

Project Management, and then **Project Request**

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



> **Note**
>
> Keyword Search is the default search mechanism for the Project Request component. The search definition must be built before the feature can be used. See Application Fundamentals: Understanding Financials and Supply Chain Search.

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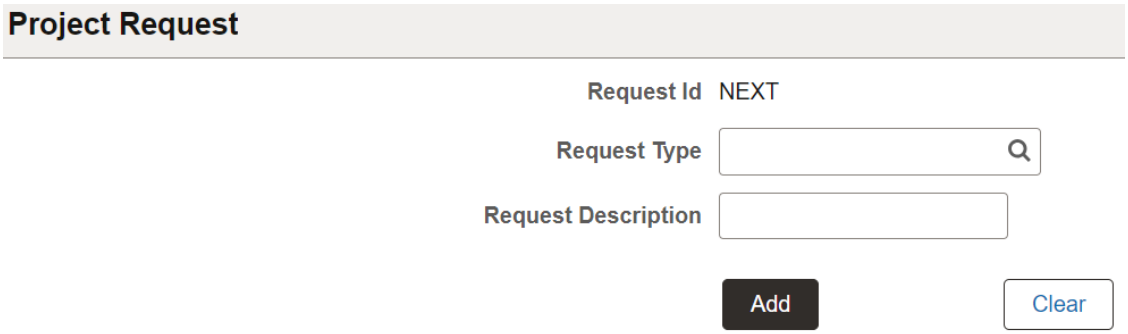
> **Note**
>
> To view requests in the search results, customers on PeopleTools 8.59.13 and later should use Real Time Indexing. If Real Time Indexing is not in use then the Project Request index needs to be refreshed on a frequent basis to view new project requests and updates to existing requests. See Application Fundamentals: Understanding Real Time Indexing in FSCM.

Field or Control	Description
+ Add	Click the Add button to create a new request.

This example illustrates the fields and controls on the Add Project Request page



For more information on request types, see Setup Project Request Types.

Project Request - Questionnaire Page

Use the Activity Guide Questionnaire page (PTAI_TMPLQUESPGNUI) to answer the questions that determine which steps are displayed in the activity guide. The questions to be displayed on this page are set on the Activity guide template. See "Defining an Activity Guide Questionnaire" section in *PeopleTools: Portal Technology* documentation.

> **Note**
>
> The pages on the activity guide might be displayed differently based on the steps selected on the Questionnaire page.

Navigation:

Project Management, and then **Project Request**. Click the Add button.

This example illustrates the fields and controls on the Project Request - Questionnaire page.

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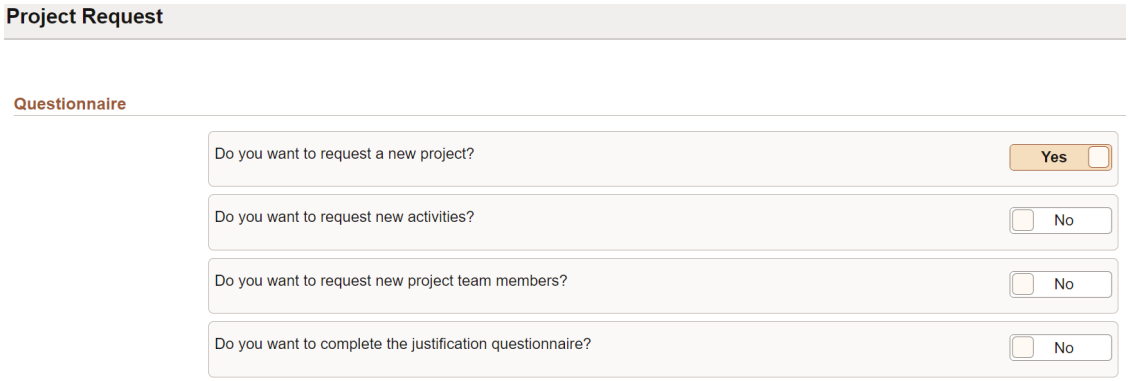


Field or Control	Description
Yes or **No**	Select *Yes* or *No* to determine if the related step is displayed in the activity guide or hidden. Answers cannot be changed after selecting *Next*.
Next	Select to initiate the activity guide.

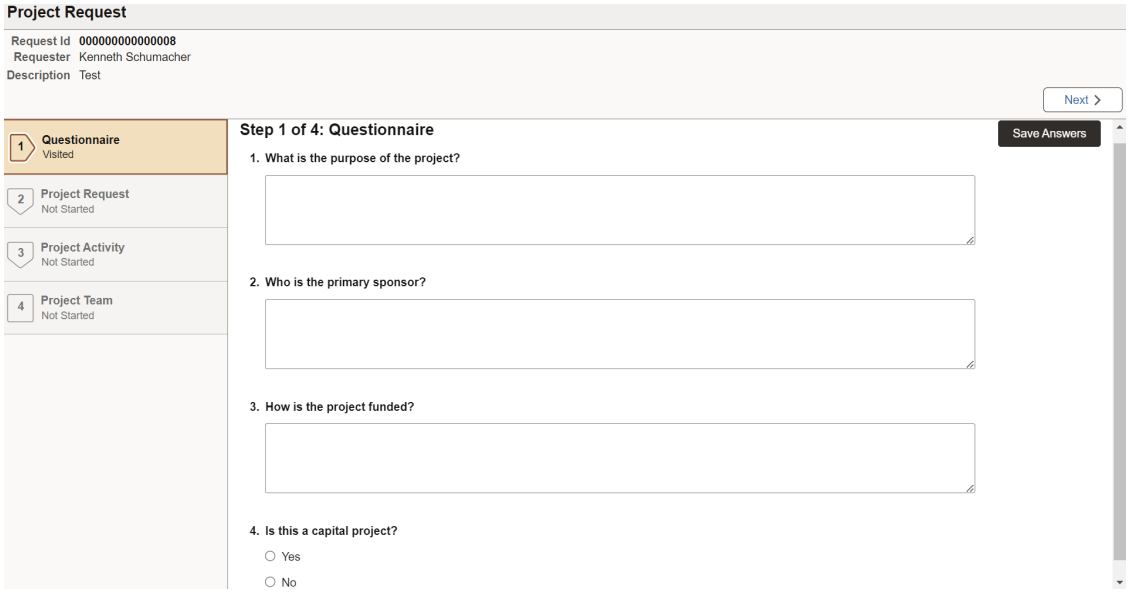
Project Request Activity Guide Step 1 of 4: Questionnaire

Use the Questionnaire page (EOQF_QSTNR_PRVW_FL) to answer questions related to the request. Configurable by the customer, these questions are provided through the Questionnaire Framework provided through Enterprise Components. See Enterprise Components: Understanding Questionnaire Framework.

Navigation:

Select the Project Request tile. From the View Project Request page, select the Add button. Answer all questions on the Questionnaire page and select the Next button.

This example illustrates the fields and controls on the Activity Guide Step 1 of 4: Questionnaire page.



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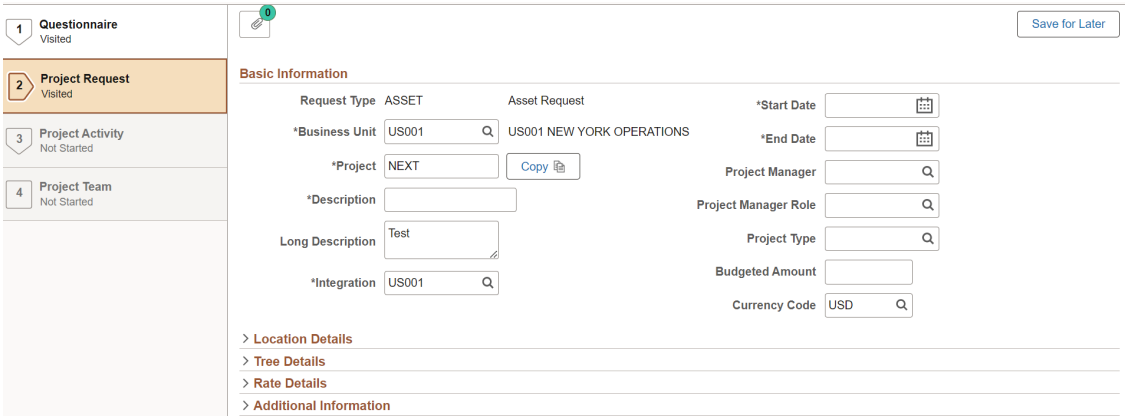
Project Request Activity Guide Step 2 of 4: Project Request

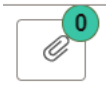
Use the Project Request page (PC_PRQ_PROJ1_FL) to enter the project information.

Navigation:

From the Project Request activity guide, select Project Request.

This example illustrates the fields and controls on the Activity Guide Step 2 of 4: Project Request page.



Field or Control	Description
	Select to add multiple attachments to the project.
Business Unit	Displays the business unit. The business unit from the Project User Preferences is displayed as the default value.
	Select to copy information from an existing project or project template into the project request.
Start Date and **End Date**	Enter a start date and an end date. The dates entered here are used as the default date in other tasks of the activity guide.
Integration and **Currency Code**	Displays the values from Project User Preferences as the default option.
Standard Activities	Select Yes to include a prompt for Activity ID on the Project Activity step.
Grants Projects	For customers who license the Grants application.
Project Category	For customers who license the Project Management application.
Organization	Displayed if Project Organization configuration has been created by the organization.

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> **Note**
>
> The fields displayed on each page can be configured using the Page and Field Configurator. For more information, see Enterprise Components: Using Page and Field Configurator.
>
> Careful consideration should be given when using Page and Field Configurator to hide fields. If all fields are hidden in a group box, then the group box will be hidden. If a separate editable field is changed by the user that triggers a hidden field in the group box to be required, the required field will not be displayed immediately. The field is displayed only after the page is refreshed.

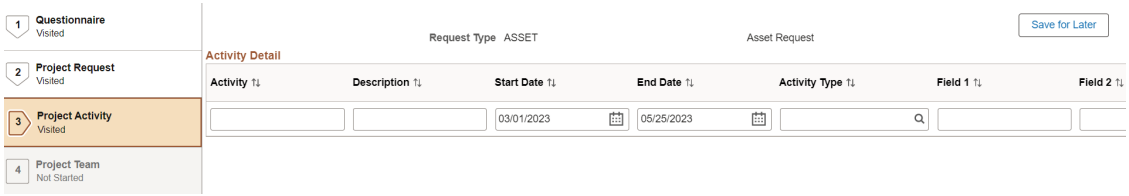
Project Request Activity Guide Step 3 of 4: Project Activity

Use the Project Activity page (PC_PRQ_PROJACT2_FL) to enter the project activity details.

Navigation:

From the Project Request activity guide, select Project Activity.

This example illustrates the fields and controls on the Activity Guide Step 3 of 4: Project Activity page.



Field or Control	Description
Activity and **Description**	Enter an Activity ID and Description. Auto-numbering using NEXT is not permitted. If standard activities are in place for the project then Activity is a prompt.

Rate Set and Rate Plan information defaults from the Project step but can be changed.

Project Request Activity Guide Step 4 of 4: Project Team

Use the Project Team page (PC_PRQ_PRJTM_FL) to enter the project team members.

Navigation:

From the Project Request activity guide, select Project Team.

This example illustrates the fields and controls on the Activity Guide Step 4 of 4: Project Team page.

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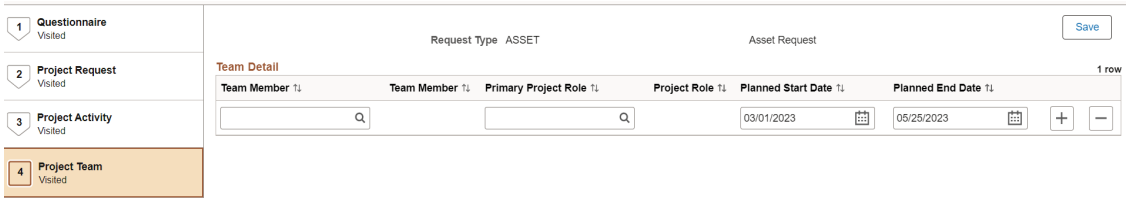
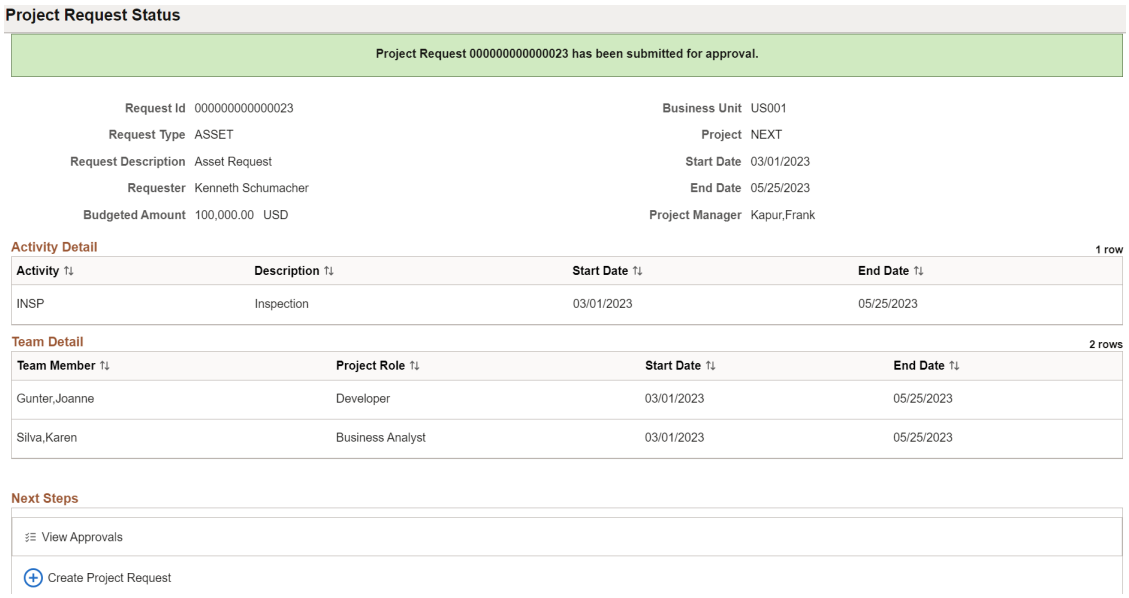


Field or Control	Description
Save	Select to save the project request. If there are any validation issues, an error message will be displayed. After fixing the error, the requester should Save and Submit the request to clear the error message. Requests that have been submitted and in the process of being approved will display a separate button to validate the request. If error exists, the approver can fix the error and then select the Validate button.
Submit	Select to submit the project request for approval and view the Project Request Status page.

> **Note**
>
> The project manager should not be entered on this page. When the project is successfully created, the project manager from the Project Request step is added to the project team component.

This example illustrates the fields and controls on the Project Request Status page.



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The Project Request Status page allows you to view the approval chain and also to create a new project request. Requests that bypass approvals will have additional links to open the Project, Project Activities and Project Team component.

Related Topics

- Enterprise Components: Understanding the Activity Guide Composer

Approving Project Requests Using Fluid Approvals

This section discusses approving project requests using fluid approvals.

Page Name	Definition Name	Usage
Approvals Tile	HMAP_APPR_TILE_FL	Review pending and previously approved requests that are associated with the user.
Pending Approvals Page	EOAWMA_MAIN_FL	View a list of all transactions that apply to the selected transaction category and access the respective transactions that are pending your approval.
Project Request Page	EOAWMA_TXNHDTL_FL	To view project information and perform the approval tasks.

Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

For more information about Notification Composer Framework, see Enterprise Components: Understanding Notification Composer

Approvals Tile

Use the Approvals tile (HMAP_APPR_TILE_FL) to access the Pending Approvals page.

Navigation:

This tile can be placed on any PeopleSoft Fluid Home page.

This example illustrates the Approvals tile.

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For information about how to add a tile to a PeopleSoft Fluid Home page, see Application Fundamentals: Adding Homepages and Tiles

The tile can show the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

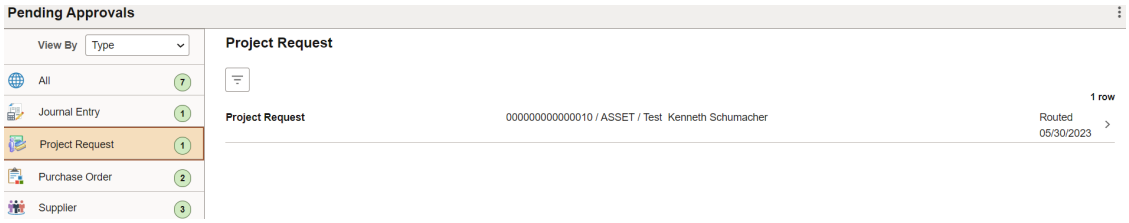
Pending Approvals Page

Use the Pending Approvals page (EOAWMA_MAIN_FL) to view a list of all transactions that apply to the selected transaction category and access the respective transactions that are pending your approval.

Navigation:

Click the Approvals tile.

This example illustrates the fields and controls on the Pending Approvals page



More Actions

You can select one of these approval views (by selecting the More Actions icon) to access these pages:

- **Pending Approvals**: An approver can view transactions pending their approval.
- **Review Approvals**: An approver can view the approvals for review.
- **Approvals History**: An approver can view approval transactions that they already worked on. This allows the user to view the status of the approval request in the approval chain and view comments by individuals within the chain. Your administrator defines how far, in the past, historical approvals can be viewed.

Field or Control	Description
View By	Select a type to view a list of transactions to be approved. Options are: *Date Routed*, *From*, *Priority*, *Requester*, and *Type*. Depending on the option selected, the options below this field change.
	Select the Filter icon to access the Filter page.

Project Request Page

Use the Project Request page (EOAWMA_TXNHDTL_FL) to view project information and perform the approval tasks.

Navigation:

From the Pending Approval page, select a project request transaction on the right.

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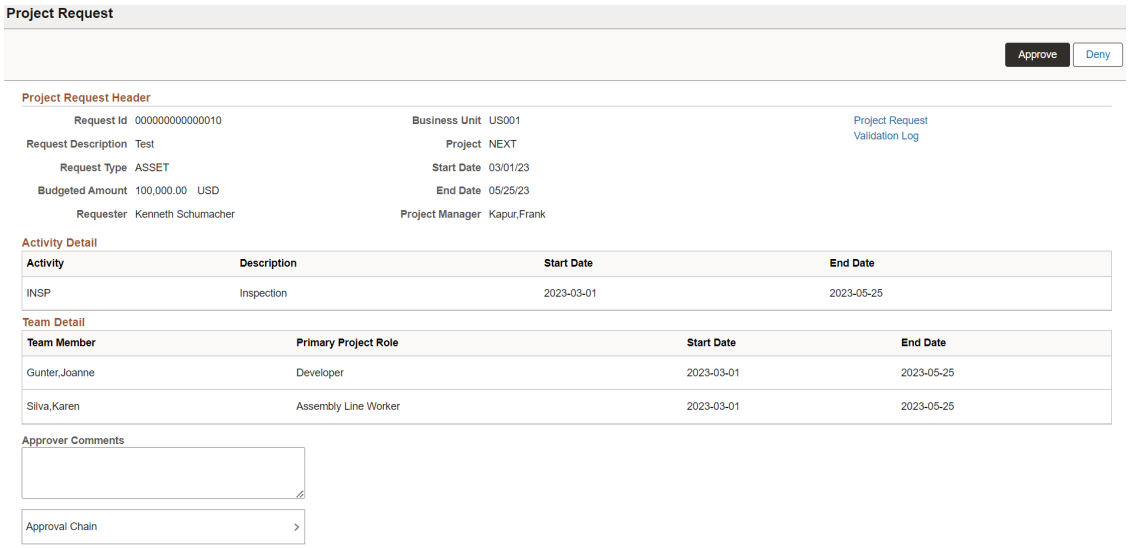
This example illustrates the fields and controls on the Project Request page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Approve and **Deny**	Select an option for the transaction. When you select one of these buttons, the system allows you to confirm or cancel your action. After you click Approve, you can enter a comment and then select the Submit button to send your approval of the transaction to the system. The system removes the transaction from your Pending Approvals queue and adds it to your Approvals History page.
Project Request	Select to access the project request activity guide. You can review and update the information if required. The edit privilege will be based on your activity guide role. If the user does not have access to the project request component, the request will be blank when opened.
Validation Log	Select to view the log if there are validation errors.
Approval Chain	Select to access the Approval Chain page. The Approval Chain displays the status of the approval chain for the transaction. You can expand and collapse subsections displayed.

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8

Using Project Trees

Understanding Project Trees

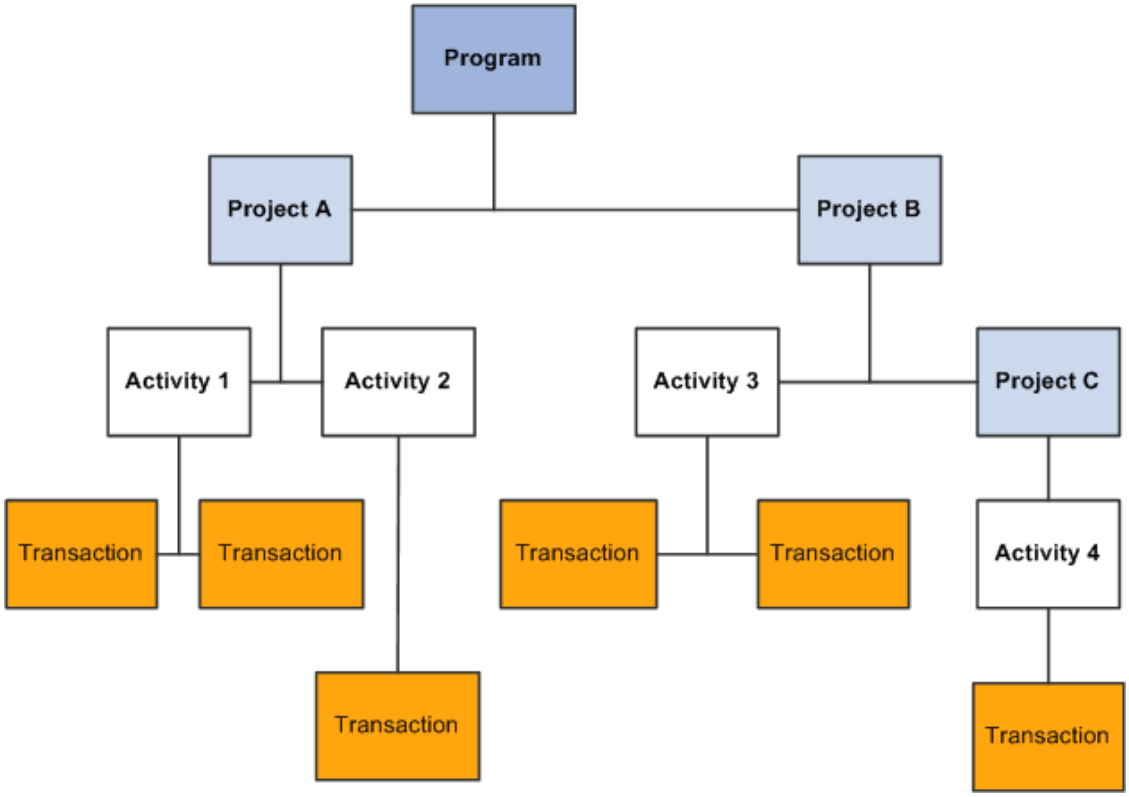
PeopleSoft Tree Manager is a PeopleTools utility that is useful with many PeopleSoft applications, including Project Costing. Project trees define how projects are related to one another. The relationships between projects determine the level of detail achieved when tracking and reporting costs.

See *PeopleTools: PeopleSoft Tree Manager*

A project can be hierarchically related to as many projects as necessary to achieve the necessary degree of cost tracking and analysis. The project structure determines how costs are accumulated, tracked, and reported.

Create a project tree to track project costs in as much detail as is required. The more detailed your project tree is, the greater the detail at which you can track your costs. In the tree shown in the following diagram, you can track costs for the entire program or for each project:

Example of a program that has two projects, project A and project B. Project A has two activities, activity 1 and activity 2. Project B has one activity and one project, activity 3 and project C. Project C has one activity, activity 4. Transactions are created from the activities.



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The costs for Project A include all costs from Activity 1 and Activity 2. The costs for Project B include all costs for Activity 3, as well as the cost for Project C (which includes Activity 4). Keep in mind that project trees are node-oriented—or winter trees—and do not display activities. You can, however, access the Project Definitions - General Information page by clicking the Edit Data icon for project trees in the Tree Manager page.

At the top of a project tree, you can create a single program into which all of the projects for the entire tree can be rolled up. This type of project is called a *program* or *summary* project. Programs are created by selecting the *Program* check box in the Project Definitions - General Information page. You cannot assign activities directly to a program. The allocation process, however, can spread costs, such as overhead, to these programs. All of the costs for a project tree, including activities assigned to all of its child projects, can be rolled up into the program.

Each project tree is keyed by business unit and effective date and has its own individual structure and security. Changes that you make to project trees are implemented throughout the Project Costing database.

Related Topics

- Project Definitions - Project Costing Definition Page
  Use the Project Definitions - Project Costing Definition page (PROJECT_GEN_01) to define various project options, project currency, and analysis groups.

Project Tree Structures

PeopleSoft Tree Manager supports business unit trees. SetIDs are not coupled with the project business unit or used as a key in Project Costing and its related activity and transaction tables. The SET_OVERRIDE field links the general ledger business unit to Project Costing. This streamlines the data structure without the loss of any features.

Project Costing delivers three tree structures. This table lists the key differences between these tree structures.

Structure	Node Table	Detail Table	Page Access from PeopleSoft Tree Manager
PROJECT_BU	PROJECT	None	PROJECT_GEN_01A page
PROJECTS_ALL	PROJECT	PROJ_ACTIVITY	PROJECT_GL page
PROJECT_GL	TREE_NODE_TBL	PROJECT	PROJECT_GL page

You can use project trees for:

- Row-level security.
- Reporting, particularly nVision reports.
- Analysis.
- Allocations.
- Report summarization options.
- Combination editing.

This table can serve as a reference when you decide which structure best meets your needs, based on your use of project trees:

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Structure	Security	Tree API	Allocation	Report Summary Option	Project Level nVision Report	Activity Level nVision Report	Combo Editing	Tree Loader
PROJECT_BU	Yes	Yes	Yes	Yes	Yes	No	No	Yes
PROJECTS_ALL	No	No	Yes	No	Yes	Yes	Yes	Yes
PROJECT_GL	No	No	Yes	No	Yes	No	Yes	Yes

The nVision reports use project trees extensively. The PROJECT_BU tree is a node-oriented (winter) tree, so there are no details. The PROJECTS_ALL tree (which is a dynamic detail tree) has ACTIVITY as details, and consequently it is the best choice for nVision reports to nPlode to the activity level.

Because the SET_OVERRIDE field is used as the link in the PROJECT_FS record and because the project ID is unique across the system, projects can be added from different business units to a single tree based on the PROJECTS_ALL tree structure.

When you create a new project from PeopleSoft Tree Manager for a PROJECTS_ALL tree, the project business unit is the same as the SetID of the tree. (This is similar to the functionality that exists in the PROJECT_GL page.) Existing projects, however, can be added from different business units as nodes if the set override of those projects matches the SetID of the tree.

For example, if BUILDING E is a project within business unit US003, BUILDING F is a project within business unit US004, and both projects have the same set override of SHARE, then you can add both projects to an existing PROJECTS_ALL tree with the SetID of SHARE (even though they are from different business units).

> **Note**
>
> The PROJECT tree structure is no longer used. All previous and existing PROJECT functionality is included in the PROJECT_BU tree structure.

Creating Project Trees

Pages Used to Create Project Trees

Page Name	Definition Name	Usage
Tree Definition and Properties Page	PSTREEDEFN	Create and define a new project tree structure.
Enter Root Node for Tree Page	PSTREEROOTLEVELS	Define the levels and root node of the tree.
Tree Levels Page	PSTREELEVEL	Add tree levels to a specific tree. To access this page, click **Add Level** in the Enter Root Node for Tree page.

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Page Name	Definition Name	Usage
Tree Level Information Page	TREE_LEVEL_PIA	Add status and description details to a tree level. To access this page, click **View Detail** in the Enter Root Node for Tree page.

Related Topics

- Third-Party Tree Loading
  The Load Projects and Activities process invokes the Projects Tree Integration Application Engine process (PC_TREE_LOAD). Use the Projects Tree Integration process to:

Creating a New Tree

To create a new tree:

1. Define the properties of the tree.
2. Add and define the levels of the tree and the root node.

Project trees can also be created, appended, and updated using data from third-party applications.

Tree Definition and Properties Page

Use the Tree Definition and Properties page (PSTREEDEFN) to create and define a new project tree structure.

Navigation:

- **Tree Manager**, and then **Tree Manager**. Click **Create New Tree** in the Tree Manager component search page.
- Click **Tree Definition** in the Tree Manager page.

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

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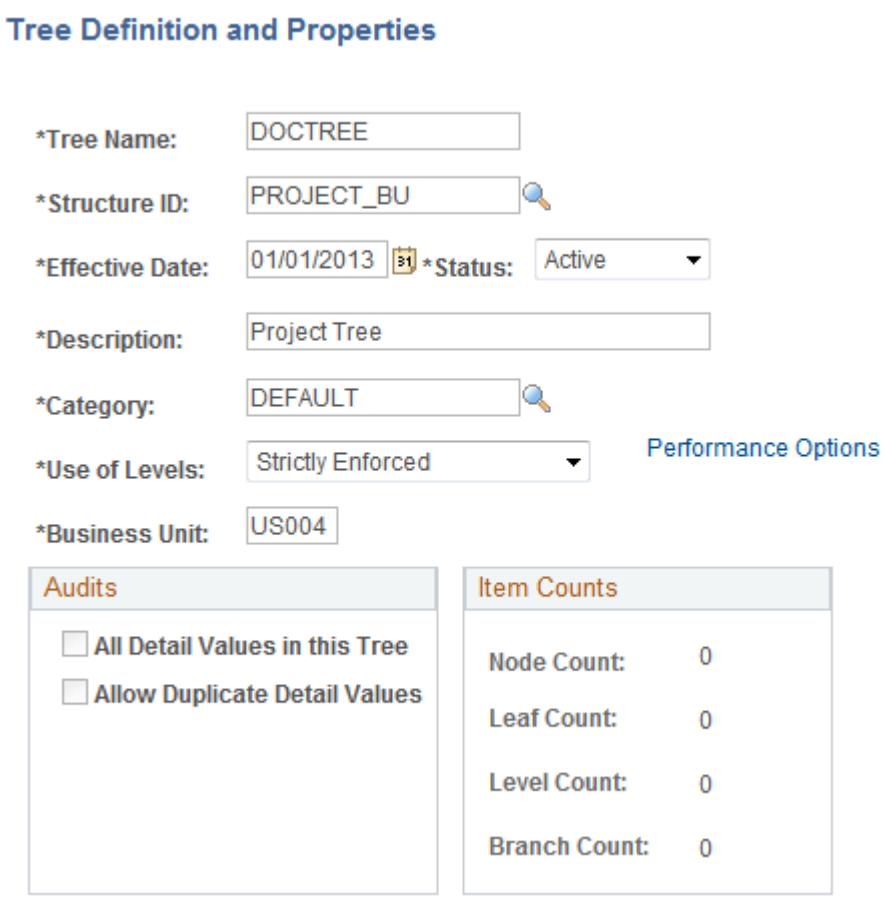

To create a new project tree, begin by defining its unique fields.

Field or Control	Description
Structure ID	Enter *PROJECT_BU* (project business unit) as the structure ID. This designates that this is a project tree and identifies the page and record definitions associated with this tree.
Category	Select *PROJECT.*
Use of Levels	Select *Strictly Enforced* to ensure that the ranking of a project node in the tree hierarchy is tied to its horizontal position in the tree. This ensures that a node at one level can be rolled up into a node at a higher level.
Business Unit	Enter a business unit. The business unit that you enter must be the same one as the projects that you add to the tree.

Enter Root Node for Tree Page

Use the Enter Root Node for Tree page (PSTREEROOTLEVELS) to define the levels and root node of the tree.

Navigation:

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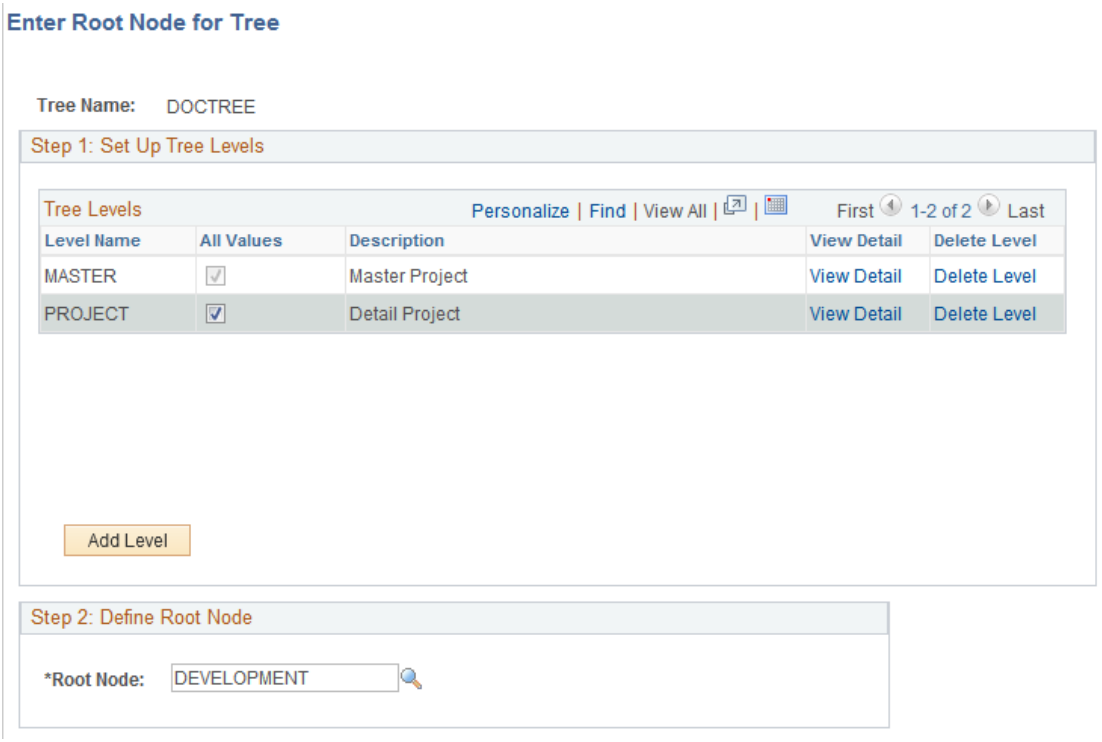
Click **OK** in the Tree Definitions and Properties page after defining the properties for a new tree.

This example illustrates the fields and controls on the Enter Root Node for Tree page. You can find definitions for the fields and controls later on this page.



You must add the first tree level before you add any nodes to a tree. After you add this first level, you can add a project node or additional levels. Add each level below the previous level.

To add levels and project nodes:

1. Access the Enter Root Node for Tree page.
2. Click **Add Level.**
3. On the Tree Levels page, enter a level name and click **Save.**
4. In the Enter Root Node for Tree page, click **View Detail** to further define the newly created level and click **OK** when finished.

   The level name and description appear in the first row of the Enter Root Node for Tree page.
5. Create additional levels by repeating steps 1-4.

   Once you have created all the necessary levels, enter the project ID in the **Root Node** field, then click **OK.** The PeopleSoft Tree Manager opens and enables you to add project nodes to the tree.

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> **Note**
>
> Level descriptions are stored in the Tree Level table. If the level that you are adding has been used in other trees, the **Description** field in the Tree Level Definition page defaults to the description already specified for that level name. Changing the description here affects all trees using this level.

To help identify the level, you can view the description in your tree, as well as in various prompt lists (when inserting nodes, selecting detail values in reports, defining summary trees, and so on).

See *PeopleTools: PeopleSoft Tree Manager*

Adding Projects to Trees

There are two ways to add a project to a tree:

- Create the project using the Project General component (PROJECT_GENERAL) and click the **Project Tree** link in the Project Costing Definition page to insert the project as a node on a tree.

  > **Note**
  >
  > If you branch a tree, you cannot add a project to the branch from the Project Costing Definition page.

- In PeopleSoft Tree Manager, select the node to which you want to add an existing project, and click the appropriate icon to insert the project as either a sibling node or a child node.

  Use the Tree Manager component (PSTREEMGR) advanced search page to look for trees with a category of *PROJECT.*

  > **Note**
  >
  > If there is not a level defined below the parent level, PeopleSoft Tree Manager creates the next level automatically when adding a child project. The newly created level, however, will not have a name or description.

Pages Used to Add Projects to Trees

Page Name	Definition Name	Usage
Assign to Project Tree Page	PC_PROJ_TREE_SEC	Assign a project to a specific tree. To access this page, click the **Project Tree** link in the Project Costing Definition Page.

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Page Name	Definition Name	Usage
Tree Manager	PSTREEMGR	Insert, delete, or rearrange projects on a project tree. See *PeopleTools: PeopleSoft Tree Manager*

Related Topics

- Project Definitions - Project Costing Definition Page
  Use the Project Definitions - Project Costing Definition page (PROJECT_GEN_01) to define various project options, project currency, and analysis groups.

Branching Project Trees

Only one user can edit an unbranched tree at a time. Branching a tree creates smaller, more manageable sections that enable multiple users to simultaneously edit different branches of the same tree. Only one user, however, can edit a particular branch at a time.

> **Note**
>
> You cannot add a project to a branch from the Project Costing Definition page.

See *PeopleTools: PeopleSoft Tree Manager*

Setting Up Security for Tree Branches

Tree branches are treated as separate objects in object security. Therefore, you can restrict access to a tree branch. This enables you to secure portions of a tree without creating a separate tree.

See *PeopleTools: PeopleSoft Tree Manager*

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9

Creating and Maintaining Activities

Understanding Activities

Activities are the specific tasks that make up a project. You can add transactions to a project only at the activity level.

This topic discusses:

- Activity creation options.
- Activity owners.
- PeopleSoft Project Costing summary activities.
- Program Management summary activities.

Activity Creation Options

Use any of these methods to create new activities:

- Add an activity on the Activity Definitions - General Information page and enter the required information.
- Add an activity to a project on the Project Activities page.

  Activities created on the Project Activities page are merely placeholders with activity IDs and high-level descriptions sufficient to add transactions. Use the Activity Definitions - General Information page, and other pages in the Project Activity component (PROJECT_ACTIVITY), to create and further define these activities.
- Use activities on a predefined project template (see Create Project From Template Page) or copy an existing project and activities (seeCopy Project Page).
- Create project activities from other PeopleSoft applications such as PeopleSoft Proposal Management (see PeopleSoft Proposal Management: Preparing and Generating Proposal Information) or PeopleSoft Contracts (see PeopleSoft Contracts: Assigning Projects and Activities to Contracts).
- Create project activities from Microsoft Project tasks (see Understanding Integration of PeopleSoft Project Costing with Microsoft Project.
- Upload activities from third-party applications by using the Project and Activity Loader Application Engine process (PC_INTF_GEN) using the Load Projects and Activities Page (see alsoUnderstanding Third-Party Data Integration).
- Upload activities from Microsoft Excel by using the Excel to Component Interface utility.

  See *PeopleTools: PeopleSoft Component Interfaces,* "Using the Excel to Component Interface Utility."

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Activity Owners

You can assign owners to detail and summary activities. The owner is primarily used for workflow approval at the activity level if you use PeopleSoft Program Management. They can be used for issues workflow or as interested parties.

You can search for activities by activity owner. In the Activity General component (PROJECT_ACTIVITY) search page, you only need to enter a business unit and any employee to view a list of activities that are owned by the employee.

Use the Activity Definitions - General Information page or the Project Activities page - Details tab to add activity owners. Any project team member is eligible to be selected as an activity owner. You cannot delete a project team member that is assigned as an activity owner.

If you modify or remove an activity owner for a summary activity, you have the option of making the change to all child activities of that summary activity.

PeopleSoft Project Costing Summary Activities

Summary activities are used to group other activities for reporting and accounting purposes.

If you use PeopleSoft Project Costing without PeopleSoft Program Management, you cannot charge transactions directly to summary activities.

You can change detail activities into summary activities and move activities to different work breakdown structure (WBS) levels if no team members or transactions are associated with the activity in these tables:

- Project Transactions Summary (PC_ACTIVITY_SUM)
- Project Transaction Interface (INTFC_PROJ_RES)
- Project Activity Team Member (PROJ_ACT_TEAM)
- Project Costing Assets (PC_AM_PROJ_DEFN)
- Contract Line Project Details (CA_DETAIL_PROJ)
- Forecast Time Detail (FC_TIME_DTL)

Program Management Summary Activities

If you use PeopleSoft Program Management, you can charge transactions and budgets to summary activities and to forecast summary activities based on the project charging level.

Related Topics

- PeopleSoft Program Management: Understanding Project Charging Levels

Understanding Work Breakdown Structures

The WBS of a project is represented by a hierarchical grid that shows project activities and their relationships. The placement of an activity on the WBS is maintained directly on the activity record. The WBS enables you to:

- Maintain summary and detail activities on a WBS to a depth of 26 levels.
- Roll up start and end dates to summary activities.
- Insert multiple activities on the WBS at the same time.

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- If you use PeopleSoft Program Management, add dependency relationships between activities.

This diagram shows the activities for an implementation project in a WBS format, and it identifies the WBS levels of each activity. Summary tasks are represented as expandable rows, which have a + sign to the left of the **Activity Name** field:

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

WBS ID	*Activity Name		*Activity
1	Phase I Implementation		PHASEI
1.1	Customize		CUSTOMIZE
1.2	Evaluate		EVALUATE
1.3	Expenses		EXPENSES
2	Phase II Implementation		PHASEII
2.1	Install		INSTALL
2.2	Materials		MATERIALS
2.3	Milestone 1		MILESTONE1
3	Phase III Implementation		PHASEIII
3.1	Network Implementation		NETWORK
3.2	Shadow Assignment		SHADOW
3.3	Train		TRAIN

A lower WBS level indicates a level in the WBS hierarchy that is more indented (deeper) than the current level. In the diagram, the 2.1 WBS ID is lower than the 2 WBS ID. A higher WBS level indicates a level in the WBS hierarchy that is less indented than the current level.

You manage the WBS on the Project Activities page where you can view all summary and detail activities. Additionally, you can see the structure change as you indent and outdent activities, and move them up and down on the WBS. On the Project Activities page, you can choose to display a specific WBS level or all levels. If you display a specific WBS level, the Project Activities grid collapses all summary activities at the selected display level and below. You can also expand and collapse summary activities individually.

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Creating and Modifying Activities

Pages Used to Create and Modify Activities

Page Name	Definition Name	Usage
Activity Definitions - General Information Page	PROJ_ACT_DESCR	Create an activity and assign it to a project. This page operates in deferred processing mode. If you use PeopleSoft Program Management, you cannot access this page if no activities exist for the project, a change request is required to add activities to the project, and you are not the project manager.
Activity Definitions - Definition Page	PROJECT_ACTIVITY	Define an activity and enter work details.
Activity Definitions - Location Page	PROJ_ACT_LOCATION	Assign the physical location of an activity.
Activity Definitions - Attachments Page	PROJ_ACT_DOC	Attach, delete, and view activity-related files.
Activity Definitions - Quality Page	PROJECT_QUALITY	Rate and record quality of work for specific activities.
Activity Definitions - User Fields Page	PC_ACT_USER	Include additional information for activities.
Activity Definitions - Rates Page	ACTIVITY_SERVICES	Enter and view billing and project costing rates that are associated with an activity.
Activity Definitions - Budget Alerts Page	PC_BUD_ACT_ALERTS	Define budget alert thresholds at the activity level.
Activity Definitions - Asset Integration Rules Page	PC_AM_RULE_ACT	Define integration with PeopleSoft Asset Management at the activity level.

Activity Definitions - General Information Page

Use the Activity Definitions - General Information page (PROJ_ACT_DESCR) to create an activity and assign it to a project.

This page operates in deferred processing mode.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **General Information**

This example illustrates the fields and controls on the Activity Definitions - General Information page (1 of 2). You can find definitions for the fields and controls later on this page.

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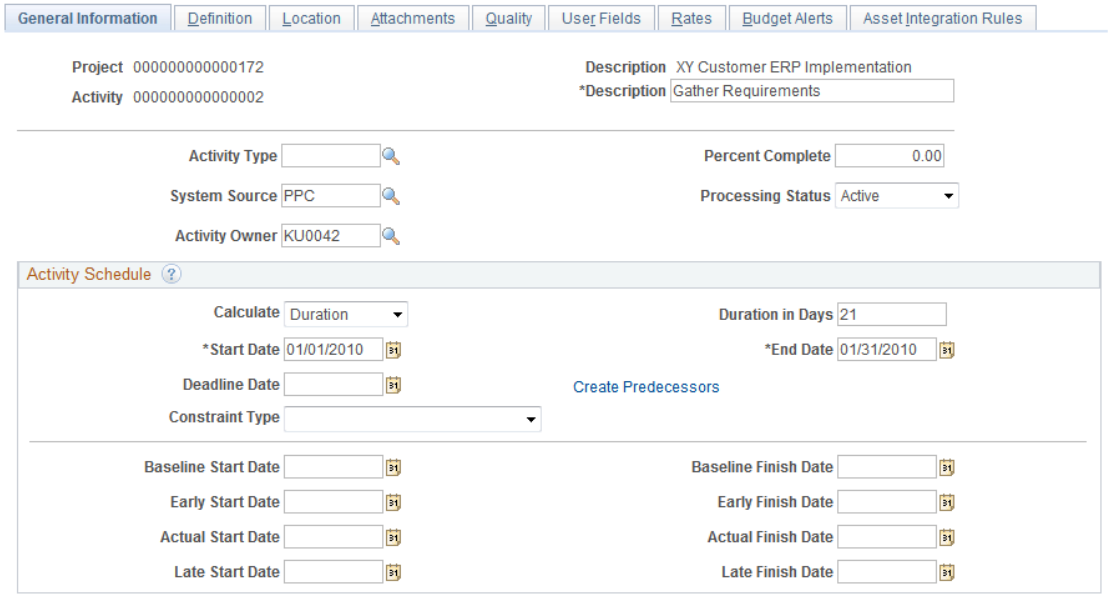
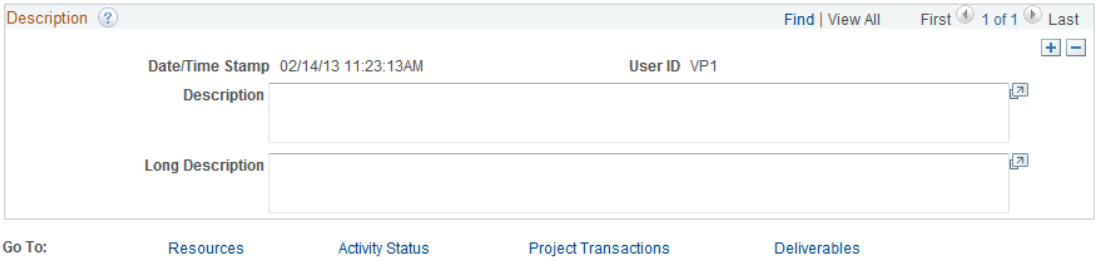


This example illustrates the fields and controls on the Activity Definitions - General Information page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Activity Type	Select an activity type. Use activity types to: • Group similar activities for reporting and analysis. • Enforce a predefined progression of statuses for activities of this type. The system controls the activity status progression based on the custom activity status path that is associated with the activity type for the business unit. You set up activity types during implementation on the Activity Types page. See Activity Types Page.

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Field or Control	Description
Percent Complete	Displays the percentage of the activity completed based on calculation method that you define on the Project Costing Definition page. If you select *Manual* in the **Calculation Method** field, you can enter a value in the **Percent Complete** field on this page. This field does not appear for activities with a processing status of *Template*.
System Source	Select the origin of an activity, such as a third-party application or an online entry page in a PeopleSoft application. The default value is *PPC* (Project Costing online entry page). Available values are based on the translate values in the System Source field (SYSTEM_SOURCE) properties.
Processing Status	Select an activity processing status. Select *Active* to make the activity available for selection from prompt lists within feeder systems to charge transactions. This field displays a processing status of *Template* if the activity belongs to a project template.
Activity Owner	Select an activity owner from the list of project team members. The default value is based on the activity owner of the parent activity, if one exists. If there is no parent activity, the activity owner default value is based on the current project manager. The system uses the activity start date to determine the project manager. If you modify or remove an activity owner for a summary activity, a message appears when you save the page asking if you want to change the activity owner for all activities under this summary activity.
Activity Team	Click to access the Activity Definitions - Team page to view and modify membership to the activity team. This link appears only if you use PeopleSoft Project Costing without PeopleSoft Program Management. See Viewing and Modifying Activity Teams.
Resources	Click to access the Resources by Activity page to view and modify the list of activity team resources. This link appears only if you use PeopleSoft Program Management. See PeopleSoft Program Management: Adding and Modifying Activity Resources.
Activity Status	Click to access the Activity Definitions - Status page to view information regarding the history and current status of the activity.
Project Transactions	Click to access the Transaction List page to view transactions for this activity. See Viewing and Adding Transactions.

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Field or Control	Description
Deliverables	Click to access the PeopleSoft Program Management: Deliverables Summary Page to view and modify deliverables for this activity. This link appears only if you use PeopleSoft Program Management.

Activity Schedule

Field or Control	Description
Start Date	Enter the activity start date. If the activity start date is earlier than the project start date, the system adjusts the project start date accordingly. If you use PeopleSoft Program Management, you cannot enter a start date for a summary activity if the **Activity Date Cascade Calculations** for the project are set to *Delay Calculations Until Save* or *Realtime Calculations*.
Calculate	Select the method of calculating the activity schedule. This field appears only when you use PeopleSoft Program Management and you select an **Activity Date Cascade Calculations** option of *Delay Calculations Until Save* or *Realtime Calculations* on the Program Management definition page for the project. For detail activities, select *Duration*, *End Date*, or *Start Date* to specify which one of these three fields is calculated by the system based on the values that you enter for the other two fields. For example, select *End Date* for the system to calculate the activity end date based on the values that you enter for activity start date and duration. The default value is based on the **Activity Calculation Method** field on the Program Management definition page for the project. For summary activities, the **Calculate** field value is *Duration* and is not editable. **Note:** You can override the default calculation method on a detail activity; however, you should limit this practice to exceptions only. Oracle recommends that detail activities use the same activity calculation method as the project.
Duration in Days	Enter the length of time needed to complete an activity. This field appears only if you use PeopleSoft Program Management. You cannot enter a duration for a summary activity if the **Activity Date Cascade Calculations** for the project are set to *Delay Calculations Until Save* or *Realtime Calculations*.

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Field or Control	Description
End Date	Enter the activity completion date. If the activity end date is after the project end date, the system adjusts the project end date accordingly. If you use PeopleSoft Program Management, you cannot enter an end date for a summary activity if the **Activity Date Cascade Calculations** for the project are set to *Delay Calculations Until Save* or *Realtime Calculations*.
Deadline Date	Enter the deadline date for the activity. You can enter any date, regardless of the project and activity schedules. If the activity end date falls after the deadline, an alert indicator appears on the Project Activities page. The date that you enter in this field also populates the **Deadline** field on the Project Activities page: More Dates tab. This field is for informational purposes only and appears only if you use PeopleSoft Program Management.
Constraint Type	Select a constraint type to indicate when an activity can start or end. This field appears only if you use PeopleSoft Program Management. See PeopleSoft Program Management: Understanding Activity Constraints and PeopleSoft Program Management: Specifying Activity Constraints.
Constraint Date	Select a constraint date if required based on the constraint type for this activity. The **Constraint Date** field appears only if you selected a constraint type that requires a constraint date and only if you use PeopleSoft Program Management.
Baseline Start Date and **Baseline Finish Date**	Enter the projected start and finish dates for the activity. These fields do not appear for activities with a processing status of *Template*.
Early Start Date and **Early Finish Date**	Enter the earliest possible activity start and completion dates. These fields do not appear for activities with a processing status of *Template*.
Actual Start Date and **Actual Finish Date**	Enter the actual activity start and completion dates. These fields do not appear for activities with a processing status of *Template*.
Late Start Date and **Late Finish Date**	Enter the latest possible activity start and completion dates. These fields do not appear for activities with a processing status of *Template*.

Description

Enter a description and a long description for the activity. These fields are informational only, and you can use them to track notes over time. Each description is stamped with the date and time of entry and the user ID.

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The **Long Description** field does not appear for activities with a processing status of *Template.*

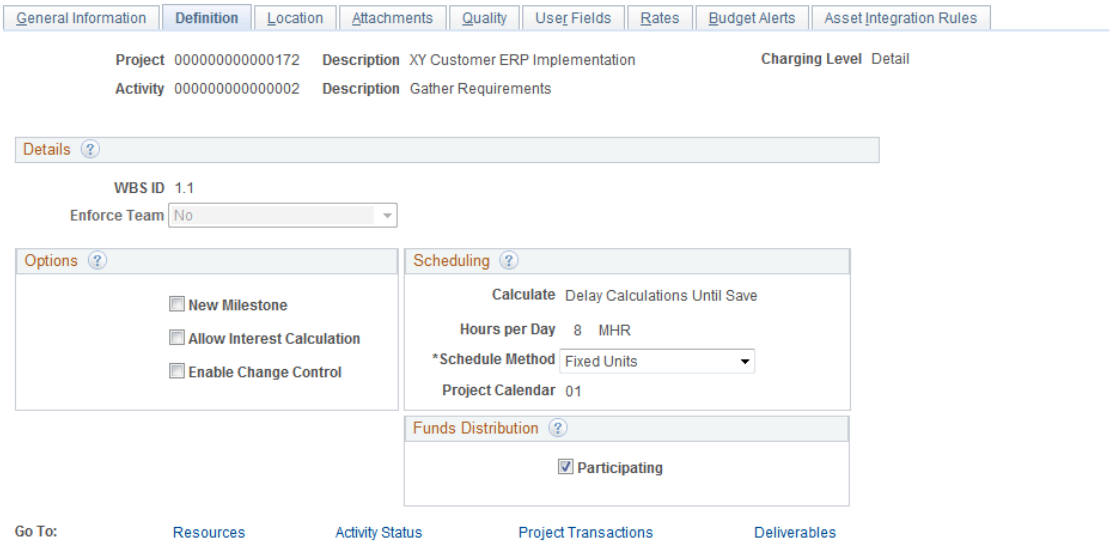
Activity Definitions - Definition Page

Use the Activity Definitions - Definition page (PROJECT_ACTIVITY) to define an activity and enter work details.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **Definition**

This example illustrates the fields and controls on the Activity Definitions - Definition page. You can find definitions for the fields and controls later on this page.



Use this page to select activity owner, activity team security, and options that control the functionality of the activity.

Field or Control	Description
Charging Level	Displays the WBS level at which you want to track project budgets, forecasts, and costs. The system restricts charges to summary and detail activities that are in the specified level. This field appears if you use PeopleSoft Program Management. See PeopleSoft Program Management: Understanding Project Charging Levels.

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Field or Control	Description
WBS ID (work breakdown structure ID)	Displays the hierarchical order of the activity within the WBS of the project. This value is system-generated based on the placement of the activity in the WBS. When you create a new activity from the Project Activity component, the system assigns a WBS ID that represents the last activity at level 1 of the WBS. You can move the activity in the WBS by using the Project Activities page.

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Field or Control	Description
Enforce Team	Designates who can charge time and expenses to the activity. The **Enforce Team** drop-down list box is available for selection on this page if *both* of these conditions exist: • **Decide at the Project Level** is selected as the enforce team option on the Project Costing Options page for the business unit. • **Project and Activity Team** is selected as the enforce team option on the Project Costing Definition page for the project. If the **Enforce Team** drop-down list box is available for selection, the possible values are: *No:* Select to enable all members of the project team to enter time and expenses against this activity for the period that they are on the project team. *Expenses:* Select to enforce activity team membership in PeopleSoft Expenses. Only activity team members can charge time and expenses in the PeopleSoft Expenses system against this activity for the period that they are on the project team. *Exp and TL* (Expenses and Time and Labor): Select to enforce activity team membership in PeopleSoft Expenses. Additionally, users can charge time in the PeopleSoft Time and Labor system to any activity on the project if they have security access to the project. *Time&Labor:* Select to enable all members of the project team to enter time and expenses against this activity for the period that they are on the project team. A read-only value of *No* in the **Enforce Team** field indicates that either *Do Not Enforce* or *Project Team Only* is selected as the enforce team option at the project level. A read-only blank value indicates that either *Project Resource Pools Only* or *Project Activity Resource Pool* is selected as the enforce team option at the project level. **Note:** The PeopleSoft Time and Labor system does not enforce project activity team. If you select the *Exp and TL* or *Time&Labor* product option, the system restricts PeopleSoft Time and Labor users for projects to which they can charge time. However, PeopleSoft Time and Labor users can charge time to any activity on a particular project if they have security access to the project. Security options are discussed in the Defining Project Security topic. See also, Project Definitions - Project Costing Definition Page.

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Options

Field or Control	Description
New Milestone	Select to indicate that this activity as a milestone activity. You can view all project milestones on the Project Milestones page by navigating to **Project Costing**, and then **Project Definitions**, and then **Project Milestones.**
Allow Interest Calculation	Select to indicate that interest will be calculated for this activity when the PC Interest Application Engine process (PC_INTEREST) runs.
Enable Change Control	Select to enable change control for this activity. The system automatically generates the user name, change made, and date for the changes if you use PeopleSoft Program Management. See PeopleSoft Program Management: Understanding Change Control Management.

Scheduling

This group box appears only if you use PeopleSoft Program Management.

Field or Control	Description
Calculate	Displays the calculation method that determines when the system rolls up start and end dates on summary activities for the activity.
Hours per Day	Displays the number of hours that define a work day for this activity. The system uses this value to calculate the amount of time that a resource is available for the schedule.
Schedule Method	Select the method for calculating schedules. The scheduling method determines what element of a project schedule remains constant when one of the three scheduling variables (work, duration, or units) changes.
Project Calendar	Displays the calendar that the system uses for calculating schedules for the activity. The system uses this calendar to determine business holidays and nonwork days, and factor them into the calculation of start dates, end dates, and durations.

See PeopleSoft Program Management: Understanding Programs, Projects, and the Enterprise Program Tree.

Funds Distribution

The **Funds Distribution** group box appears when the **Enable Funds Distribution** check box is selected on the Installation Integration Options page.

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Field or Control	Description
Participating	Select to indicate that the activity is eligible to be selected as a *source* to Funds Distribution. All activities are eligible to be selected as a target to funds distribution. Deselect this check box to prevent the activity from being processed by the Funds Distribution process. This field allows specific activities that are not reimbursable to be excluded from the Funds Distribution process. For example, you could define a single distribution rule for a project and use this attribute to exclude selected activities.

For more information about funds distribution, see Understanding Funds Distribution

Activity Definitions - Location Page

Use the Activity Definitions - Location page (PROJ_ACT_LOCATION) to assign the physical location of an activity.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **Location**

Field or Control	Description
Location Code	Select a location code that is already defined in the system. The address for this code appears in the bottom half of the page and cannot be edited.
Add Location	Click to access the Location Definition page, where you can add or modify a location in the Location table (LOCATION_TBL). The location codes and addresses that you enter on the Activity Definitions - Location page are stored in the Project Activity Location table (PROJ_ACT_LOC). See Application Fundamentals: Setting Up Locations.

Activity Definitions - Quality Page

Use the Activity Definitions - Quality page (PROJECT_QUALITY) to rate and record quality of work for specific activities.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **Quality**

This example illustrates the fields and controls on the Activity Definitions - Quality page. You can find definitions for the fields and controls later on this page.

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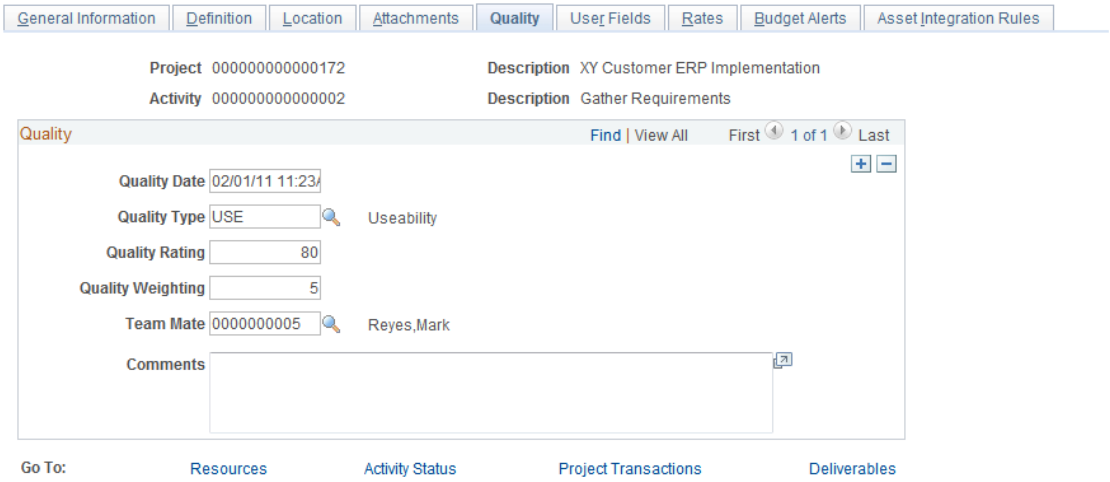

Field or Control	Description
Quality Date	Displays the date on which the quality rating is performed.
Quality Type	Select the criteria on which the quality rating is based. Quality types are defined in the Project Quality Type table (PROJ_QUAL_TBL).
Quality Rating	Enter a quality rating as a whole number from *1* to *999*.
Quality Weighting	Enter a quality weighting as a whole number from *1* to *999*.
Team Mate	Select the employee ID of the person performing the quality rating.

Activity Definitions - User Fields Page

Use the Activity Definitions - User Fields Page (PC_ACT_USER) to include additional information for activities.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **User Fields**

This example illustrates the fields and controls on the Activity Definitions - User Fields page.

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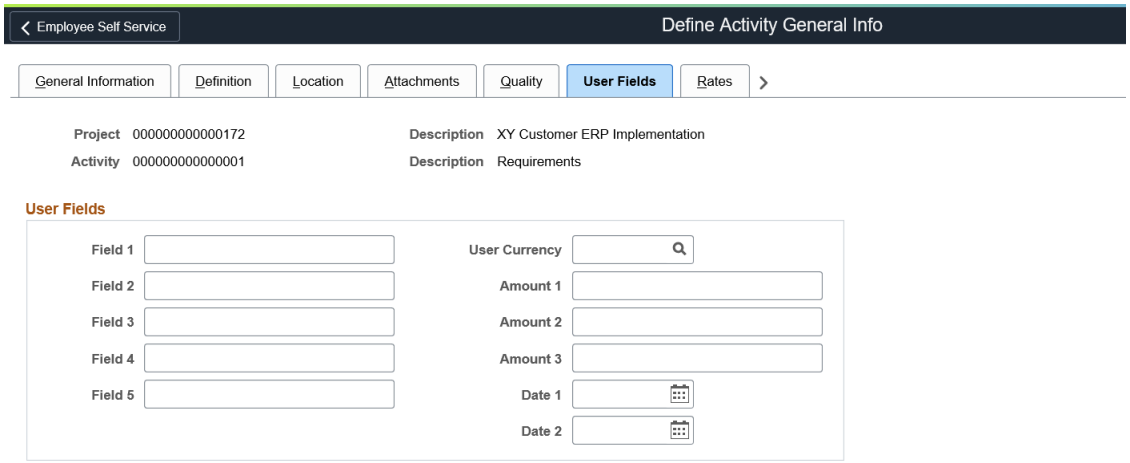


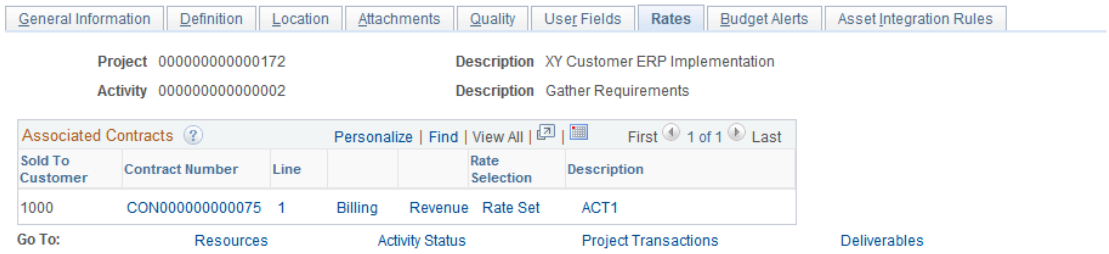
Activity Definitions - Rates Page

Use the Activity Definitions - Rates page (ACTIVITY_SERVICES) to enter and view billing and project costing rates that are associated with an activity.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **Rates**

This example illustrates the fields and controls on the Activity Definitions - Rates page. You can find definitions for the fields and controls later on this page.



Associated Contracts

Displays the current contract information associated with the project and activity. The grid is blank if no contracts are associated with the project and activity, which is the case when you use this page to associate rate sets or rate plans with a project and activity for internal project costing that does not require billing, or when you have not yet linked the project and activity to a contract line.

Field or Control	Description
Contract Number	Click the link to access the Contract - General page in the PeopleSoft Contracts system.
Line	Click the link to access the Related Projects page in the PeopleSoft Contracts system.

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Field or Control	Description
Billing	Click to access the Review Billing - Plans page to search for and view billing plans in the PeopleSoft Contracts system.
Revenue	Click to access the Review Revenue - Plans page to search for and view revenue plans in the PeopleSoft Contracts system.
Rate Selection	Displays one of these values if a contract is associated with the activity: *Contract Rate Set* *Contract Rate Plan* *Rate Plan* *Rate Set* Click the link to access the Related Projects page in the PeopleSoft Contracts system.
Description	Click the link to access the rate set or rate plan.

Rates

Displays the rate set or rate plan that is associated with the project activity ID. This group box appears if no contracts are associated with the project and activity.

Field or Control	Description
Effective Date	Enter the effective date of the association of the rate set or rate plan to the activity. This field can be based on one of these options: • The start date of the activity when you save a new activity that automatically inherits the default rate selection of the project. • The date that you update the activity rate selection by using the **Update Activities** button on the Project Definitions - Rates page. See Defining Rate Set Categories, Rate Sets, and Rate Plans. • A date that you enter. The date that you enter must be later than the effective date of the active rate selection.
Status	Select *Active* or *Inactive* as the status that corresponds to the effective date of the association of the rate set or rate plan to the activity.
Rate Selection	Select a *Rate Plan* or *Rate Set* to attach to the activity. The default value is based on the project's rate selection.

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Field or Control	Description
Rate	Enter a rate set or rate plan for project costing. This field can be based on these options: • A rate selection that you enter. Available values are based on rate sets and rate plans that are valid for the business unit and are active on the date that you enter in the **Effective Date** field. • The default rate selection of the project at the time that you create a new activity. You can override the default rate selection at the activity level. • The default rate selection of the project at the time that you update the activity by clicking the **Update Activities** button on the Project Definitions - Rates page. You can link a rate set to an activity if no rate set or rate plan is attached at the contract line. You can link a rate plan to an activity for either of these conditions: • No rate set or rate plan is attached at the contract line. • A contract-specific rate set is attached at the contract line. See PeopleSoft Contracts: Understanding the Relationship Between PeopleSoft Contracts and PeopleSoft Project Costing. Activities do not inherit the project level default rate set if any of these situations occur: • The rate selection is not active on the start date of the activity. • The activity is created in PeopleSoft Contracts. • You create a summary activity by using the Project Activities page or the Load Projects and Activities Application Engine process (PC_INTF_GEN).
View/Add Rates	Click to access the Rate Sets component (PC_RATE) to view, add, or modify rate sets.

Related Topics

- Defining Rate Set Categories, Rate Sets, and Rate Plans
  To define rate set categories, rate sets, and rate plans, use these components:

Activity Definitions - Asset Integration Rules Page

Use the Activity Definitions - Asset Integration Rules page (PC_AM_RULE_ACT) to define integration with PeopleSoft Asset Management at the activity level.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **Asset Integration Rules**

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Asset integration rules for the business unit, project, or activity are discussed in the Asset Integration Rules topic.

Activity Definitions - Budget Alerts Page

Use the Activity Definitions - Budget Alerts page (PC_BUD_ACT_ALERTS) to define budget alert thresholds at the activity level.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Activity General Info**, and then **Budget Alerts**

Budget alerts for the business unit, project, or activity are discussed in the Setting Up Budgets in PeopleSoft Project Costing topic.

Adding Activities to Projects

Pages Used to Add Activities to Projects

Page Name	Definition Name	Usage
Project Activities Page	PC_PROJ_ACTIVITY	Add activities to a project and view all activities assigned to a project. This page operates in deferred processing mode. If you use PeopleSoft Program Management, you cannot access this page if no activities exist for the project, a change request is required to add activities to the project, and you are not the project manager.
Activity Alerts Page	PGM_PRJ_ACTALT_SEC	If you use PeopleSoft Program Management, view alert messages for an activity in the **Project Activities** grid.
Project Activities - Gantt Chart Page	PC_GANTT_CHART	View project activity schedules in a WBS grid and Gantt chart format.

Project Activities Page

Use the Project Activities page (PC_PROJ_ACTIVITY) to add activity schedules to a project and view all activities assigned to a project. This page operates in deferred processing mode.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Project Activities**

This example illustrates the fields and controls on the Project Activities page: Schedule tab. You can find definitions for the fields and controls later on this page.

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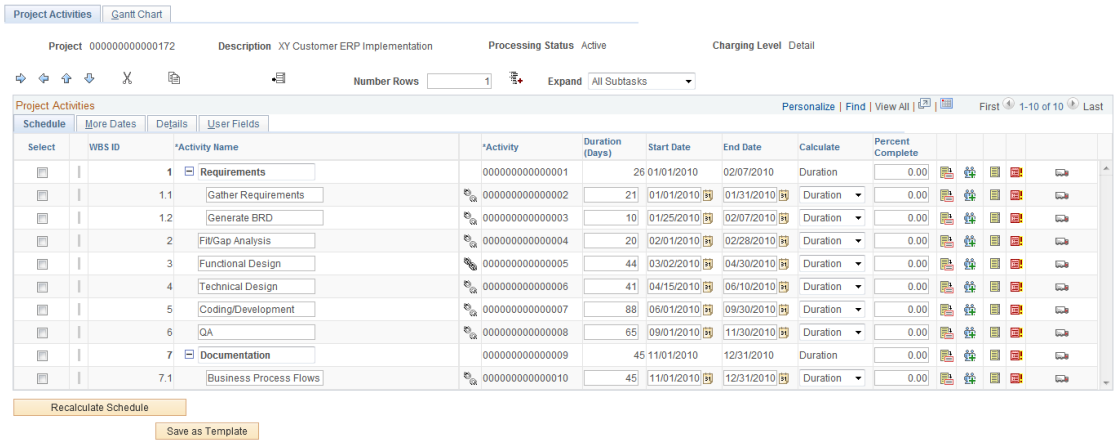

Changes that you make to fields on this page also appear on the Activity Definitions - General Information page.

Use the toolbar located just above the **Project Activities** grid to expand and collapse rows and to perform actions on selected activities in the WBS.

Field or Control	Description
	Click to indent the selected row by one WBS level. This is a list of characteristics and restrictions for indenting rows: • If you indent a summary activity, the system also indents all of the detail activities that belong to the summary activity. • If you indent a row that is at the same level as the previous row, the previous row becomes a summary activity. • Activity team members can be associated only with detail activities, not summary activities. Therefore you cannot change a detail activity to a summary activity if team members exist on the detail activity. • You cannot indent the first row in the **Project Activities** grid. • You can indent up to the number of levels indicated on the Project Costing Options page. • You cannot indent a row more than one level from its parent activity.

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Field or Control	Description
	Click to outdent the selected row by one WBS level. This is a list of restrictions and characteristics for outdenting rows: • If you outdent a summary activity, the system also outdents all of the detail activities that belong to the summary activity. • Outdenting a row moves the selected row up one level. • You cannot outdent a row that is at WBS level 1. • Outdenting a row with siblings causes the selected row to become the parent of its siblings. This cannot occur if the outdented row contained team members, because a summary row cannot contain team members.
	Click to move the selected row one row higher in the grid. If you move a summary activity up in the grid, the system also moves the detail activities that belong to the summary activity. The moved row inherits the lower (more indented) WBS level of the row above and below the moved row. For example, in the page shown above, if you move activity Install (WBS level 2) up one row, then it is placed between activity Expenses (WBS level 2) and Phase II Implementation (WBS level 1). Therefore, the Install activity inherits WBS level 2.
	Click to move the selected row one row lower in the grid. If you move a summary activity down in the grid, the system also moves the detail activities that belong to the summary activity. The moved row inherits the lower WBS level of the row above and below the moved row. For example, in the page shown above, if you move activity Milestone 1 (WBS level 3) down one row, then it is placed between activity Expenses (WBS level 2) and Phase III Implementation (WBS level 1). Therefore, the Milestone 1 activity inherits WBS level 2.

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Field or Control	Description
	Click to cut the selected row from the grid. If you cut a summary activity, the system also cuts all of the detail activities that belong to the summary activity. After you cut a row, the next action in the grid should be to paste the row, or click the **Undo Cut** icon for the cut row to reappear in the location from which it was cut. If your next action is anything other than to paste the row or undo the cut, a message appears stating that cut rows are still in the clipboard. Select an action to perform next: • For pending projects, you can permanently delete the rows, paste them to another location in the WBS, or undo the cut action and reinsert the rows in the same location from which they were cut. • For active projects, you can paste them to another location in the WBS, or undo the cut action and reinsert the rows in the same location from which they were cut. If you use PeopleSoft Program Management, you cannot permanently delete cut rows on this page if a change request is required to delete activities on the project, and you are not the project manager.
	Click for the cut row to reappear in the location from which it was cut. This icon appears when you cut a row and disappears when you paste the row.
	Click to copy the selected rows. If you copy a summary activity, the system also copies all of the detail activities that belong to the summary activity. If you use PeopleSoft Program Management, the **Copy** icon does not appear if a change request is required to add or delete activities on the project, and you are not the project manager.

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Field or Control	Description
	Select a row and click the **Paste** icon to paste the most recent cut or copied rows below the selected row. This icon appears on the page when you cut or copy a row. You can paste a copied row as many times as needed until you copy or cut another row. You can paste a cut row only once, after which the **Paste** icon disappears until you copy or cut another row. The pasted row inherits the lower WBS level of the row above and below the pasted row in its new location. On pasted rows that you copied, the default value of the activity ID is *NEXTn*, where *n* is the number of rows that you are inserting since the last save. At save time, the system assigns the next sequential activity ID number to all rows with an activity ID of *NEXTn*. On pasted rows that you cut, the row retains the activity ID of the cut row.
	Select a row and click the **Delete** icon to delete the selected row. This icon appears only for pending projects. If you use PeopleSoft Program Management, you cannot delete an activity that is a predecessor to another activity. **Note:** To remove a predecessor-successor relationship, use the Gantt chart to identify the successor activity, navigate to the successor activity row on the Project Activities page, and access the Activity Predecessors page to remove the predecessor activity.

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Field or Control	Description
and **Number Rows**	Select a row, enter the number of rows that you want to add, and click the **Add** icon to add the blank rows below the selected row. New rows that you add to the grid are inserted below the selected row. Rows following the new inserted rows are renumbered sequentially. If you select a detail activity, the new rows are inserted at the same level as the selected detail row. If you select a summary activity with detail rows that are expanded in the grid, the new rows are inserted as detail rows to the selected summary activity. If you select a summary activity with detail rows that are collapsed in the grid, the system ignores the hidden subtasks and inserts the new rows at the same level as the selected summary row. The default value of the activity ID on inserted rows is *NEXTn,* where *n* is the number of rows that you are inserting since the last save. At save time, all rows with an activity ID of *NEXTn* are assigned the next sequential activity ID number.
	Click the **Expand All** icon to expose all summary and detail rows. You do not need to select rows when you use the **Expand All** icon.
Expand	Select the WBS level that you want to view in the **Project Activities** grid. Available options are: *All Subtasks:* Select to display all levels of the WBS. This value is the default. *Level 1* through the level specified on the Project Costing Options page. Select to collapse all summary activities at the selected level and lower (more indented). For example, if you select *Level 3,* only rows in Levels 1, 2, and 3 are visible in the grid. If you select *Level 1,* all rows are collapsed and only the first level is visible. You can then individually expand summary activities by clicking on the plus sign next to the activity name in the grid. You do not need to select individual rows when you use the **Expand** drop-down list box.

Project Activities - Schedule

On the Schedule tab you can:

- View all summary and detail activities on a project and their relationships in the **Project Activities** grid.

  You can expand and collapse summary activity rows and select the WBS level to appear.
- Modify the activity name, schedule, and percent complete.
- Modify activity relationships.

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You can indent and outdent rows, move rows up and down, and insert rows. If the project processing status is *Pending,* you can delete rows from the grid.

- Add a new activity to the list.

  After you add an activity on this page, you may further define the activity using the Project Activity component pages, beginning with the Activity Definitions - General Information page.

> **Note**
>
> If the **Standard Activities** option is selected on the Project Costing Definition page, you can assign only predefined standard activities to the project.

Field or Control	Description
Select check box	Select to perform an action on a row, such as to indent, outdent, cut, copy, or move the row. Each time you select a new row, the previously selected row is deselected.
	Indicates one of these conditions for the activity if you use PeopleSoft Program Management: • The activity is assigned one of these inflexible constraints: – *Must End On* – *Must Start On* – *End No Later Than* – *Start No Later Than* • The activity is assigned one of these flexible constraints: – *End No Earlier Than* – *Start No Earlier Than* – *As Soon as Possible* – *As Late as Possible* Move the mouse pointer across the icon to view alternate text about the nature of the condition. This icon appears only if you use PeopleSoft Program Management.

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Field or Control	Description
	Indicates one of these conditions for the activity if you use PeopleSoft Program Management: • The activity is scheduled to complete later than its deadline date. • The activity is not scheduled within its constraints. This condition occurs if you deselect the project-level option to **Always Honor Constraint Dates,** and schedule activity dates that fall outside the constraint date. Move the mouse pointer across the icon to view alternate text about the nature of the condition. If more than one condition exists, click the icon to access the Activity Alerts page to view the alert messages. This icon appears only if you use PeopleSoft Program Management.
WBS ID (work breakdown structure ID)	Displays the WBS level where the activity resides.
Activity Name	Enter a unique description of the activity.
	Click the **Create Predecessors** icon to access the Activity Predecessors page to add predecessors. This icon appears only if you use PeopleSoft Program Management and no predecessor exists for the activity.
	Click the **Review Predecessors** icon to access the Activity Predecessors page to view, modify, or delete predecessors. This icon appears only if you use PeopleSoft Program Management and one or more predecessors exist for the activity.
Activity	Displays the activity ID for existing activities. When you add rows to the grid, this field is available for you to enter a new activity ID, or accept the default value for the system to assign the activity ID.
Duration (Days)	Enter or view the activity duration in days. The duration calculation is based on the option that you select in the **Calculate** field for this row. If you choose a **Calculate** value of *Duration*, the system calculates the **Duration (Days)** value anytime that you change the **Start Date** or **End Date** and the scheduling **Calculate** method on the Activity Definitions - Definition page is not *Manual*. This field appears only if you use PeopleSoft Program Management.

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Field or Control	Description
Start Date and **End Date**	Enter the start and end dates for the activity. The default value for the **Start Date** is based on the project start. The end date is determined by the start date plus a default duration of one day. You can override the default dates. If you enter activity dates that are outside of the project date range, the system updates the corresponding project dates. If you use PeopleSoft Project Costing without PeopleSoft Program Management, you must manually enter activity start and end dates or accept the default start and end dates. The system does not calculate the scheduling dates, and the detail activity start and end dates do not roll up to the summary activity dates. If you use PeopleSoft Program Management, you can select an **Activity Date Cascade Calculations** option on the Program Management options page for the project that enables automatic calculation of activity dates. For example, if you select an **Activity Date Cascade Calculations** option of *Realtime Calculations* or *Delay Calculations Until Save:* • The system updates an activity's **Start Date, End Date,** and **Duration** field values immediately when you update one of those fields. • The **Start Date, End Date,** and **Duration** field values cannot be edited on summary activity rows. • For calculations that are delayed until save time, the system updates and displays summary activity schedules, based on changes to the detail activity schedules, at save time or each time that you click the **Recalculate Schedule** button. • For real-time calculations, each time that you change a detail activity schedule, the system calculates and displays the updated summary activity schedule. **Note:** Always use *Delay Calculations Until Save* as the **Activity Date Cascade Calculations** option for large projects, such as those with greater than 100 activities. For optimal performance, the **Realtime Calculations** option is not recommended for large work breakdown structures. • Schedule changes are committed to the database when you save the page. If you use PeopleSoft Program Management and you select an **Activity Date Cascade Calculations** option of *Manual:* • The **Start Date, End Date,** and **Duration** field values are open for editing on all rows. • Detail activity dates do not roll up to the summary activity dates. Detail activity

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Field or Control	Description
	dates are independent of the summary activity dates. See PeopleSoft Program Management: Establishing PeopleSoft Program Management Business Unit Options.
Calculate	Select the method of calculating the activity schedule. This field appears only when you use PeopleSoft Program Management and you select an **Activity Date Cascade Calculations** option of **Delay Calculations Until Save** or **Realtime Calculations** on the Program Management definition page for the project. Select *Duration, End Date,* or *Start Date,* to specify which one of these three fields is calculated by the system based on the values that you enter for the other two fields. For example, select *End Date* for the system to calculate the activity end date based on the values that you enter for activity start date and duration. The default value is based on the **Activity Calculation Method** on the Program Management definition page for the project. **Note:** You can override the default calculation method on an activity; however, you should limit this practice to exceptions only. Oracle recommends that the activity use the same **Activity Calculation Method** as the project.
Percent Complete	Displays the percentage of the activity completed based on calculation method that you define on the Project Costing Definition page. If you select *Manual* in the **Calculation Method** field on the Project Costing Definition page, you can enter a value in the **Percent Complete** field on this page. If you select a calculation method of *Budget Amount, Budget Hours, Duration, Forecast Amount,* or *Forecast Hours,* the system automatically calculates and displays the percent complete value. The *Duration* calculation method is available only if you use PeopleSoft Program Management. See Project Costing Options Page.
	Click the **Activity Definition** icon to access the Activity Definitions - General Information page, where you can view specific information about the activity.
	Click the **Drill to Resources by Activity** icon to access the Activity Definitions - Team page if you use PeopleSoft Project Costing without PeopleSoft Program Management. If you use PeopleSoft Program Management, click this icon to access the Resources by Activity page.

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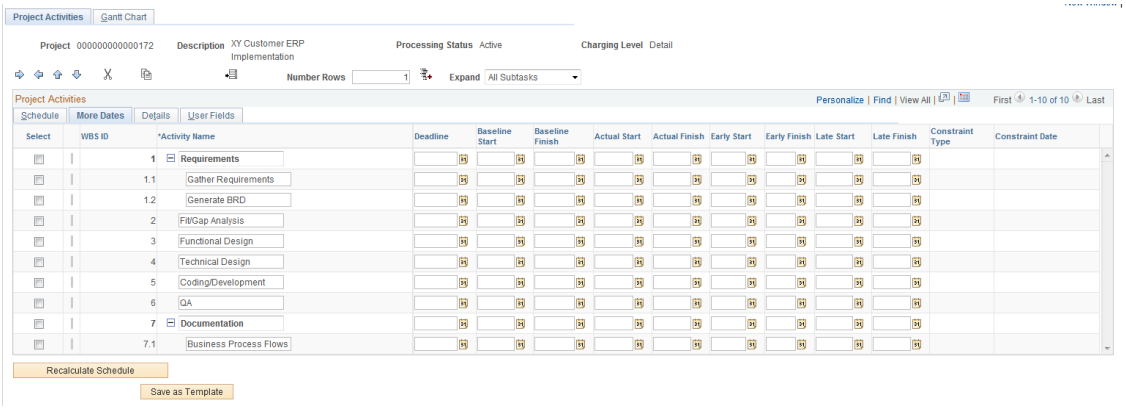
Field or Control	Description
	Click the **Project Transaction List** icon to view transactions for the corresponding activity on the Transaction List page.
	Click to access the Issue page to view, add, or modify issues for the activity. This icon appears only if you use PeopleSoft Program Management.
	Click to access the Deliverables Summary page to view, add, or modify deliverables for the activity. This icon appears only if you use PeopleSoft Program Management.

Project Activities - More Dates

Use the Project Activities page: More Dates tab to enter a deadline date, baseline start and finish dates, actual start and finish dates, and early start dates.

This example illustrates the fields and controls on the Project Activities page: More Dates tab. You can find definitions for the fields and controls later on this page.



This page contains additional activity dates that are not part of the summary activities date calculation.

You cannot enter a finish date without first entering the corresponding start date, and you cannot enter a finish date that is earlier than the corresponding start date.

Field or Control	Description
Deadline	Enter the deadline date for the activity. The date that you enter in this field also populates the **Deadline Date** field on the Activity Definitions - General Information page. This field is for informational purposes only and appears only if you use PeopleSoft Program Management.

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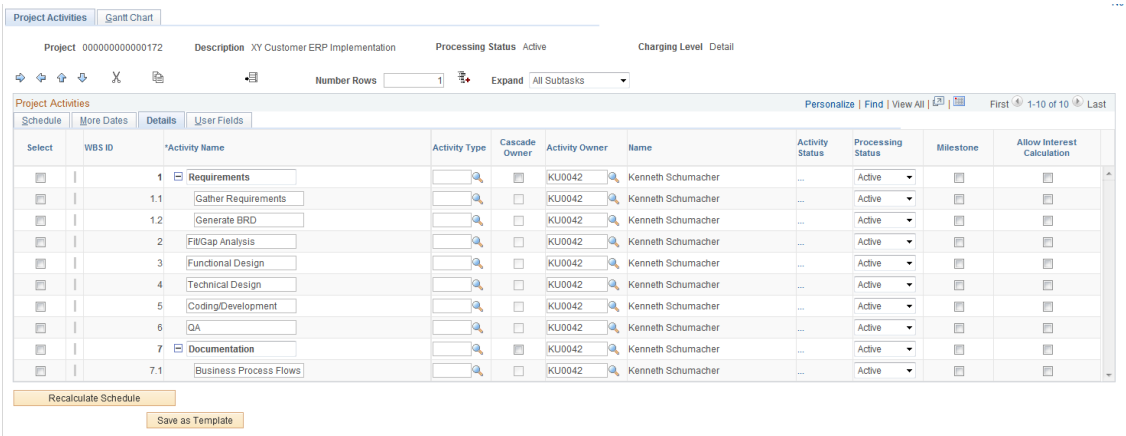
Field or Control	Description
Constraint Type	Displays the value that you entered in the **Constraint Type** field on the Activity Definitions - General Information page. This field appears only if you use PeopleSoft Program Management.
Constraint Date	Displays the value that you entered in the **Constraint Date** field on the Activity Definitions - General Information page. This field appears only if you use PeopleSoft Program Management.

Project Activities - Details

Use the Project Activities page: Details tab to enter activity and owner information.

This example illustrates the fields and controls on the Project Activities page: Details tab. You can find definitions for the fields and controls later on this page.



This page contains activity attributes for activity owner, type, processing status, milestone, and interest calculation.

Field or Control	Description
Activity Type	Enter or modify the activity type.
Cascade Owner	Select to populate the **Activity Owner** field on child activities of this summary activity with the activity owner of the summary.
Activity Owner	Select an activity owner from the list of project team members.
Activity Status	Displays the current activity status. Click the link to transfer to the Activity Definitions - Status page to view or update activity status.
Processing Status	Select an activity status. Select *Active* to make the activity available for selection from prompt lists within feeder systems to charge transactions.

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Field or Control	Description
Milestone	Select to indicate that this activity is a milestone.
Allow Interest Calculation	Select to include this activity in interest calculations.

Project Activities - User Fields

Use the Project Activities page: User Fields tab to enter and maintain user-defined attributes for the activity

The only edit that the system performs on this page is to the **User Currency** field. Available currencies are based on the Currency Codes table (CURRENCY_CD_TBL).

Related Topics

- Standard Activities Page
  Use the Standard Activities page (FS_ACTVITY_TBL1) to create and modify standard activities.

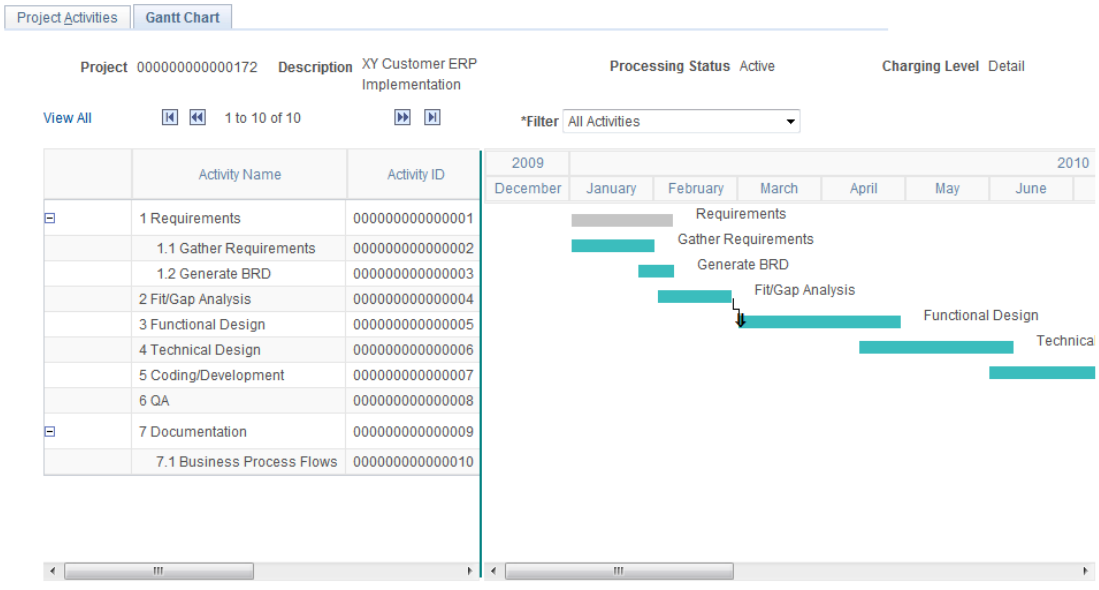
Project Activities - Gantt Chart Page

Use the Project Activities - Gantt Chart page (PC_GANTT_CHART) to view project activity schedules in a WBS grid and Gantt chart format.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Define Project Activities**, and then **Gantt Chart**

This example illustrates the fields and controls on the Project Activities - Gantt Chart page. You can find definitions for the fields and controls later on this page.



The Project Activities - Gantt Chart page represents project activity schedules in a WBS grid and Gantt chart format for the rows that appear on the Project Activities page. The count of

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rows in the grid and the total number of activities on the project appear above the grid. The chart refreshes each time that you access the page.

Field or Control	Description
Filter	Select *All Activities, Critical Path,* or *Milestone Activities* to indicate how to filter the activity rows. The *Critical Path* option identifies each activity path in the project by using the activity hierarchy as well as the chain of dependencies plus their constraints. It then determines the activity path that has the latest end date. The activity path that has the latest end date is the critical path. Critical path activities appear in orange.

WBS Grid

In the grid area you can view the WBS ID, activity description and ID, duration, activity start and end dates, and percent complete.

To navigate in the grid:

- Click the blue *First, Previous, Next,* and *Last* navigation arrows to scroll vertically through the activity rows.
- Click the plus and minus symbols to expand and collapse summary activities in the WBS grid and the Gantt chart area.

  This action also expands and collapses the grid on the Project Activities page.
- Click the black navigation arrows below the grid to scroll horizontally across the columns.

> **Note**
>
> You must click the black navigation arrows, not the sliding bar, to scroll horizontally across the grid.

Gantt Chart

The chart area displays schedules for multiple periods beginning with the earliest activity start date. A horizontal bar represents the duration for each activity. Summary activities appear in gray, detail activities appear in cyan, and critical path activities appear in orange. A black overlay bar represents the percent complete for the activity. Use the horizontal scroll bar of the browser to view earlier and later periods.

Based on the duration of the project, the system determines the appropriate two-tier calendar scale to appear at the bottom of the chart. If the project duration is greater than or equal to 180 days, then the calendar scale is in increments of month and year. If the project duration is less than 180 days, then the calendar scale is in increments of day and month.

Move the mouse pointer across each bar to view alternate text about the activity name, start date, end date, and percent complete.

If you have more than 25 rows of activities, select **View All** for all activities to appear in the grid.

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If you use PeopleSoft Program Management, lines appear on the Gantt chart to show activity dependency relationships if any exist. If you have more than 25 rows in the grid, you must select **View All** to view all dependency relationships. If you have more than 25 rows and you do not select **View All,** then the Gantt chart will not display all of the dependency relationships for the project.

Maintaining Activity Status

Page Used to Maintain Activity Status

Page Name	Definition Name	Usage
Activity Definitions - Status Page	PROJECT_ACT_STATUS	View detailed information about the life of the project. This page operates in deferred processing mode.

Activity Definitions - Status Page

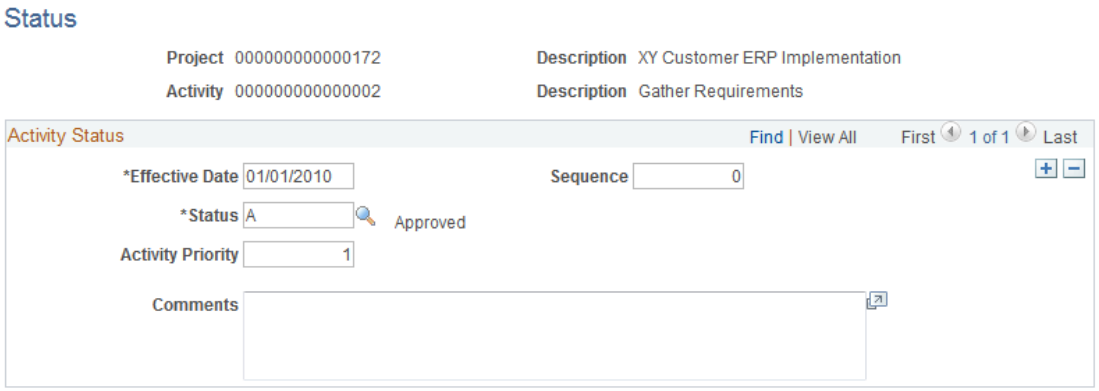
Use the Activity Definitions - Status page (PROJECT_ACT_STATUS) to view detailed information about the life of the project.

This page operates in deferred processing mode.

Navigation:

- **Project Costing**, and then **Activity Definitions**, and then **Update Activity Status**
- **Project Costing**, and then **Activity Definitions**, and then **Define Project Activities**. Click the **Activity Status** link on the Details tab of the Project Activities page.

This example illustrates the fields and controls on the Activity Definitions - Status page.



Use this page to create a new effective dated row for each status change to maintain a history of the activity.

Changes that you make on this page can trigger an email notification to project team members if you select these options:

- **Enable Status Control** on the Installation Options - Project Costing Integration page.

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- **Email Notify for Status Change** on the Activity Type Status Path page.
- **Email Notify for Status Change** on the Project Definitions - Team page for the team member (if you use PeopleSoft Project Costing without PeopleSoft Program Management) or the Resource Detail page (if you use Program Management).

Field or Control	Description
Sequence	The system increments the sequence number, which tracks incremental changes in status. By using a sequence number in combination with the status effective date, multiple status changes can occur on the same day.
Status	Select the activity status that corresponds to the status effective date. Available options are based on the values that you enter on the Status Types page during implementation. See Status Types Page.

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10

Staffing Project and Activity Teams

Understanding Team Staffing in PeopleSoft Project Costing

Project managers can staff a project and its related activities from the Project Definitions - Team page. The Project Definitions - Team page maintains a central view of all project assignments and scheduling. You can assign team members to multiple schedules in a variety of project roles.

Project teams can be further defined into separate activity teams. You can assign a project team member to multiple activity teams or none at all. Employees must belong to the project team before you can assign them to an activity team that is related to the project.

> **Note**
>
> If you use PeopleSoft Program Management, you can add resources directly to activities and let the system automatically assign them to the project team.

You can select only employees for membership to project and activity teams in Project Costing. Employee data can be loaded into the Financials database from the Human Capitol Management System (HCM) database. You can also load job and job code data from the HCM database to staff a team by job code by using an application messaging process that employs these enterprise integration points (EIPs):

- PERSON_BASIC_SYNC and PERSON_BASIC_FULLSYNC to load employee data.
- JOBCODE_SYNC and JOBCODE_FULLSYNC to load job code data.
- WORKFORCE_SYNC and WORKFORCE_FULLSYNC to load job data.

You can also enter employees directly into the Financials database by using the Personal Data (Edit) page in the Personal Data (Edit) component (EX_PERSONAL_DATA2).

See also, *PeopleTools: PeopleSoft Integration Broker*

Related Topics

- Application Fundamentals: Personal Data (Edit) Page (Common Definitions)

Creating Project and Activity Teams

To create project and activity teams, use the Project Team component (PROJECT_TEAM1).

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Pages Used to Create Project and Activity Teams

Page Name	Definition Name	Usage
Project Definitions - Team Page	PROJECT_TEAM_01	View a list of all project team members and their project roles and schedules, add and remove project team members by using job codes, and add and remove individual project team members. This page operates in deferred processing mode.
Project Team Standard Rate Sheet Page	PC_TEAM_RATES	View the cost and bill rates for project team members.
Project Definitions - Team Detail Page	PROJECT_TEAM_02	View and modify project team member project roles and schedules, view the activity teams to which project team members belong, add project team members to activity teams, and remove project team members from activity teams.
Activity Team Assignment Page	PC_TEAM_ACT_SELECT	Assign employees to activities and create activity schedules.

Project Definitions - Team Page

Use the Project Definitions - Team page (PROJECT_TEAM_01) to view a list of all project team members and their project roles and schedules, add and remove project team members by using job codes, and add and remove individual project team members.

This page operates in deferred processing mode.

Navigation:

Project Costing, and then **Project Definitions**, and then **Manage Project Team**

This example illustrates the fields and controls on the Project Definitions - Team page (1 of 2). You can find definitions for the fields and controls later on this page.

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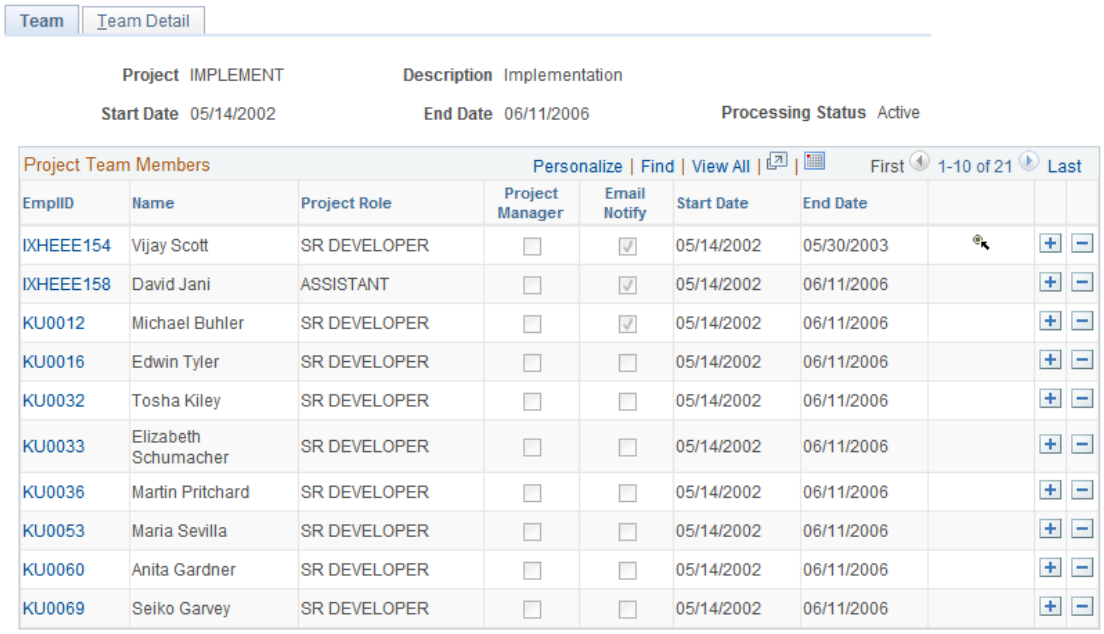
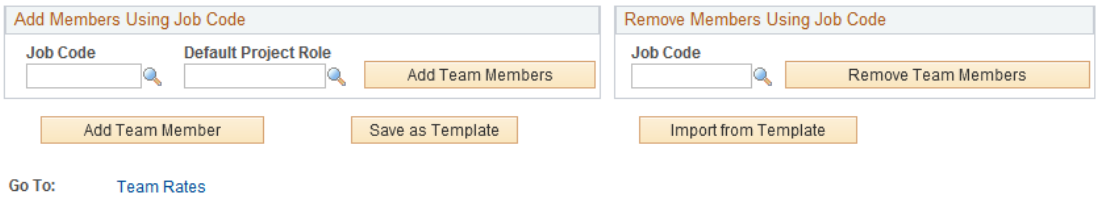


This example illustrates the fields and controls on the Project Definitions - Team page (1 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Start Date and **End Date**	Displays the project start and end dates at the top of the page.

Project Team Members

This grid lists all project team members.

Field or Control	Description
EmplID (employee identifier)	Click the link to access the team member's detail row on the Project Definitions - Team Detail page.
Name	Displays the team member's name.

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Field or Control	Description
Project Role	Displays team member's project role for the start and end dates that appear on the row. If the employee is assigned multiple roles, this field displays the project role of the first scheduled assignment. Click the **EmplID** link to view the complete list of project roles for the employee on the Project Definitions - Team Detail page.
Project Manager	Displays a check mark if the team member is designated as the Project Manager. The check mark appears only if the Project Manager schedule available on the Team Detail page is for the current date or the Project Manager schedule starts on the same date as a future dated project. Use the Project Definitions - Team Detail page to designate a project team member as the Project Manager.
Email Notify	Displays a check mark if the team member is notified of changes to the project's status. You select this option for each team member on the Project Definitions - Team Detail page.
Start Date	Displays the date that the employee begins the assignment. If the employee is assigned multiple schedules, this field displays the start date of the first scheduled assignment. Click the **EmplID** link to view the complete list of scheduled dates for the employee on the Project Definitions - Team Detail page.
End Date	Displays the date that the employee finishes the assignment. If the employee is assigned to multiple schedules, this field displays the end date of the first scheduled assignment.
	Indicates that the team member has multiple schedules within the overall project schedule. Click the **EmplID** link to view the complete list of scheduled dates for the employee on the Project Definitions - Team Detail page.

Add Members Using Job Codes

Use this group box to add all members of a specific job code to a project team. To add members by using job codes:

1. In the **Job Code** field in the **Add Members Using Job Codes** group box, enter the job code that is associated with employees that you want to assign to the project.
2. In the **Default Project Role** field, select a project role to assign to the members of the job code.
3. Click **Add Team Members** to add every member of this job code to the Project Definitions - Team Detail page, where you can save the changes or delete specific members of the job code from the project.

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You can also override the default project role, start date, and end date. You cannot add a person multiple times to the same project team and, therefore, the system ignores members of the job code that already exist on the project team.

Remove Members Using Job Codes

Use this group box to remove all members of a specific job code from a project team. To remove members by using job codes:

1. In the **Job Code** field in the **Remove Members Using Job Codes** group box, enter the job code that is associated with the team members that you want to remove from the team.
2. Click **Remove Team Members.**

   The system removes only those members who were added by using the **Add Members Using Job Code** functionality on this page. Members of the team with the same job code who were added separately are not removed from the team.

   The system does not remove team members who are assigned as the owner for an activity on this project.

View Project Team Rates

Click the **Team Rates** link to access the Project Team Standard Rate Sheet page to view cost and bill rates, team roles, job codes, and project availability dates for project team members. Project team members appear on this page if you defined a project team role for the member.

See Viewing Team Rates.

Add Individual Employees to Project Teams

To directly add individual employees to a project team:

1. Add a new row in the **Project Team Members** grid in the Project Definitions - Team page.

   The Project Definitions - Team Detail page opens.
2. In the Project Definitions - Team Detail page, enter the employee, project role, and the start and end dates that the team member will work on the project in the specified role.

Remove Individual Employees from Project Teams

Perform either of these actions to remove an individual employee from a project team:

- Delete the corresponding row in the **Project Team Members** grid in the Project Definitions - Team page.
- Delete the corresponding row in the **Team Member** scroll area in the Project Definitions - Team Detail page.

Project Definitions - Team Detail Page

Use the Project Definitions - Team Detail page (PROJECT_TEAM_02) to view and modify project team member project roles and schedules, view the activity teams to which project team members belong, add project team members to activity teams, and remove project team members from activity teams.

Navigation:

Project Costing, and then **Project Definitions**, and then **Manage Project Team**, and then **Team Detail**

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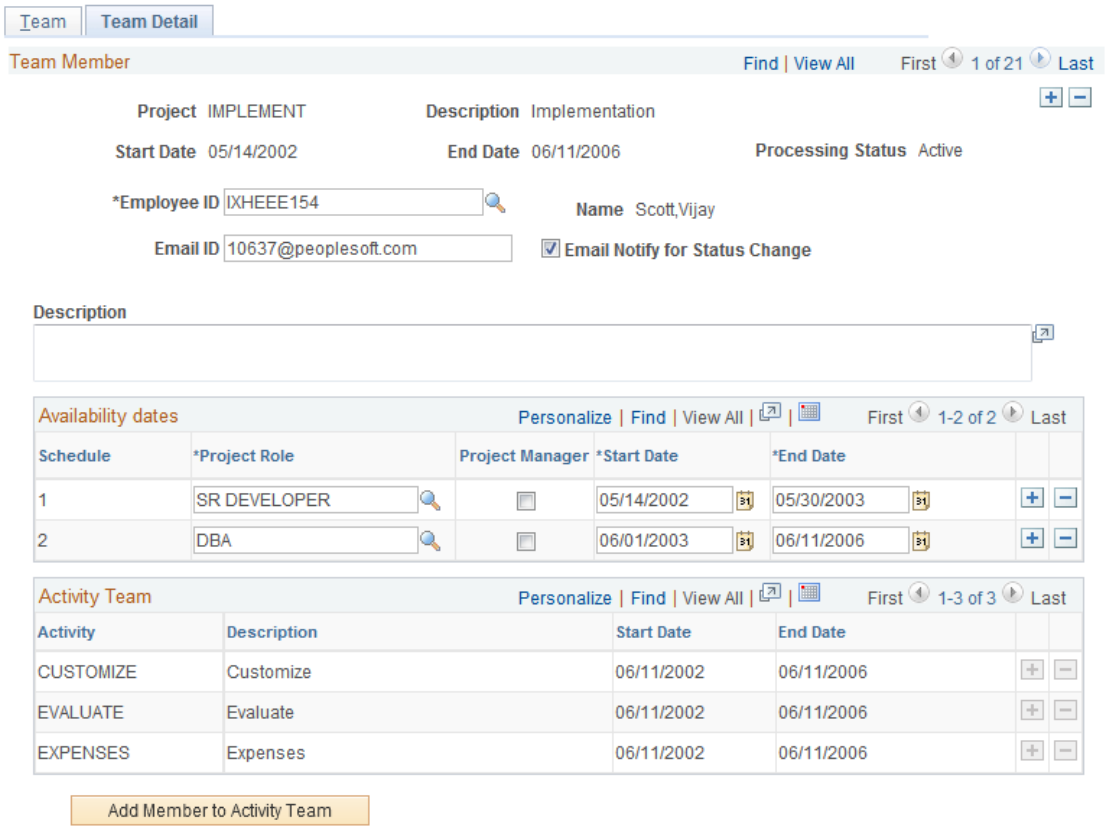
This example illustrates the fields and controls on the Project Definitions - Team Detail page. You can find definitions for the fields and controls later on this page.



Project team members can have multiple schedules with project roles that differ from the role that is defined for them on the Project Definitions - Team page.

Field or Control	Description
Start Date and **End Date**	Displays the project start and end dates at the top of the page.
Employee ID	Enter the team member's employee ID.
Name	Displays the team member's name.
Email ID	Enter the team member's email address. This field is used to notify the team member of changes to the project's status.
Email Notify for Status Change	Select to notify the team member of changes to the project's status. The default value is *Yes* (selected). You must also enter the team member's email address in the **Email ID** field.
Description	Describe or justify the addition of this team member. This field displays the employee's job code if you added the team member by using the **Add Members Using Job Code** group box on the Project Definitions - Team page.
Add Member to Activity Team	Click to access the Activity Team Assignment page to add the project team member to activity teams and create activity schedules.

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Availability Dates

Use the **Availability dates** grid to schedule a team member for different project roles with consecutive or nonconsecutive date ranges throughout the life of the project.

Field or Control	Description
Project Role	Specify the team member's roles on the project. You can use project roles to control a member's access to project data, and as a basis for charging costs.
Project Manager	Select to designate the team member as the project manager for the period of time in the schedule row. You can designate any project team member as the project manager, regardless of the team member's project role. A project can have different project managers for different time periods, but the time periods cannot overlap
Start Date and **End Date**	Enter the start and end dates that the team member is expected to work on the project in the specified role. Default values are based on the project start and end dates. You must enter a date range that falls within the project start and end dates. You can enter nonconsecutive date ranges. You cannot enter a date range that overlaps another schedule for the employee on this project.

Activity Team

The **Activity Team** grid displays a list of activities to which the resource is assigned.

Field or Control	Description
Start Date and **End Date**	Displays the start and end dates for the specified activity. These dates may not correspond to the start and end dates of the team member's assignment to the activity.

Activity Team Assignment Page

Use the Activity Team Assignment page (PC_TEAM_ACT_SELECT) to assign project team members to activity team and create activity schedules.

Navigation:

Click **Add Member to Activity Team** on the Project Definitions - Team Detail page.

> **Note**
>
> You can access this page only when you assign a project team member to an activity team by clicking **Add Member to Activity Team** on the Project Definitions - Team Detail page. After you make the assignment, the page no longer appears.

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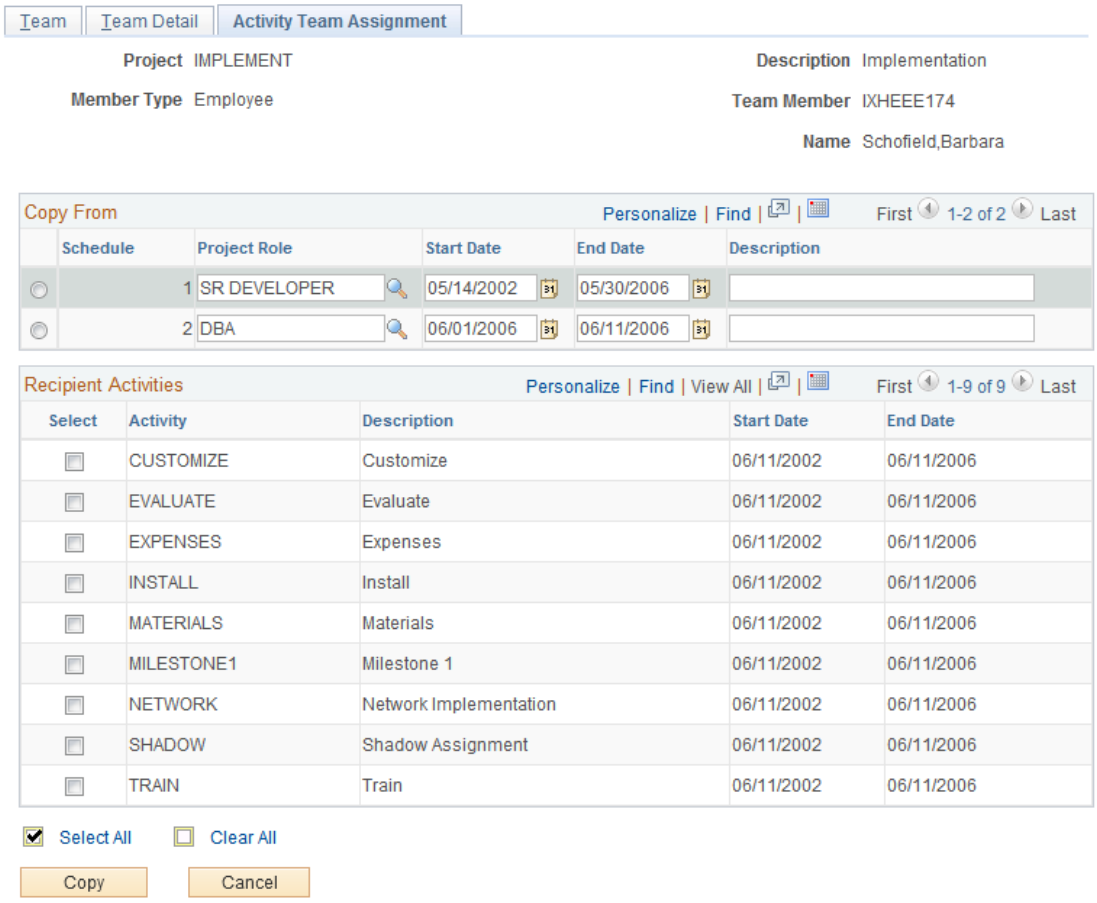
This example illustrates the fields and controls on the Activity Team Assignment page. You can find definitions for the fields and controls later on this page.



To assign project team members and their roles and schedules to activity teams:

1. In the **Copy From** grid, select the schedule row that contains the project role and date range that you want to assign to activities.

   Default values for the team member's activity role, start date, and end date are based on the member's project role and project availability dates. You can enter or modify the team member's roles, start dates, and end dates, as required.

2. In the **Recipient Activities** grid, select the activities to which you are assigning the team member in the selected project role and date range in the **Copy From** grid.

3. Click **Copy.**

   The Project Definitions - Team Detail page appears; review the activities for this team member.

4. Click **Save** to add the team member's schedule and project role to the Project Team Members grid in the Project Definitions - Team page.

   To save the activity team assignment, you must save the data on the Project Definitions - Team Detail page. Any modifications that you make to the Project Definitions - Team Detail page are not reflected on the activity team unless you access the Activity Team Assignment page and repeat this process beginning with step 1.

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Viewing and Modifying Activity Teams

To view and modify activity teams, use the Project Activity Team component (PROJ_ACT_TEAM).

Pages Used to View and Modify Activity Teams

Page Name	Definition Name	Usage
Activity Definitions - Team Page	PROJ_ACT_TEAM_01	View, add, and delete members of an activity team.
Assign Team from Project Page (to a single activity team)	PROJ_TEAM_COPY	Copy selected project team members and their schedules to a single activity team. To copy selected activity team members and their schedules to a single activity team see Copying Activity Team Members From Other Activity Teams. To copy selected project team members and their schedules to multiple activity teams see Copying Project Team Members to Multiple Activity Teams.
Select activities for resources/ requirements Page	PC_TEAM_ACT_SELECT	Select the activity teams to which you want to copy the project team members that you selected on the Assign Team from Project page. Click **Next** in the Assign Team from Project page.
Time by Activity Page	PC_LABOR_ACT_TIME	Review labor by activity. The system retrieves transactions from the Project Transactions Summary table (PC_SUMMARY_TBL) for transactional rows with an analysis type in the LABOR analysis group.
Time by Employee	PC_LABOR_EMP_TIME	Review project labor by employee. The system retrieves transactions from the Project Transactions Summary table for transactional rows with an analysis type in the LABOR analysis group. Click inside a charted area on the Time by Activity Page for a specific employee.

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Page Name	Definition Name	Usage
Activity Team Standard Rate Sheet	PC_ACT_TEAM_RATES	View the cost and bill rates for activity team members by employee, job code, or role. Click the **Activity Team Rates** link on the Activity Definitions - Team Page.

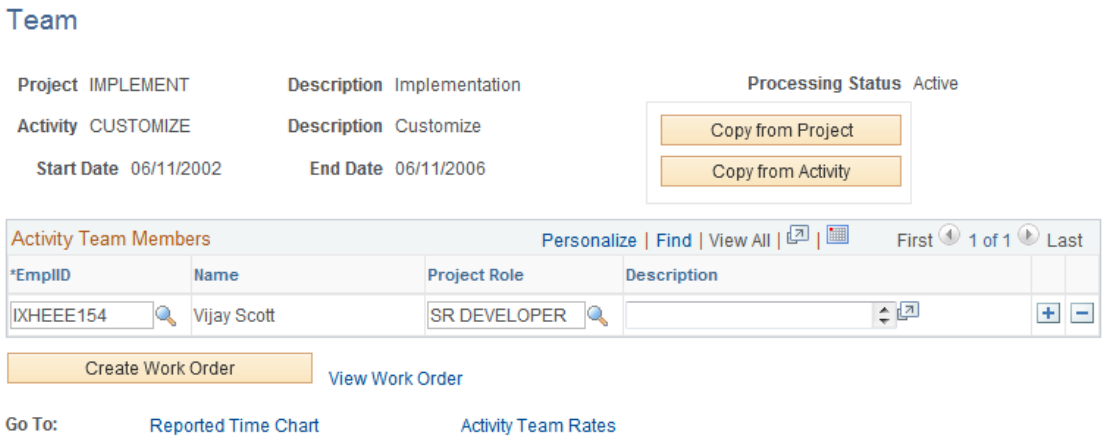
Activity Definitions - Team Page

Use the Activity Definitions - Team page (PROJ_ACT_TEAM_01) to view, add, and delete members of an activity team.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Team**, and then **Team**

This example illustrates the fields and controls on the Activity Definitions - Team page. You can find definitions for the fields and controls later on this page.



To directly add an individual employee to an activity team, add a new row in the **Activity Team Members** grid and enter the team member's employee ID and project role. You can add employees to the activity team only if they exist on the project team.

To remove an individual employee from an activity team, delete the corresponding row in the **Activity Team Members** grid. The employee is removed from the activity team but remains on the project team.

Field or Control	Description
Copy from Project	Click to access the Assign Team from Project page to add project team members to the activity team. See Assign Team from Project Page (to a single activity team).

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Field or Control	Description
Copy from Activity	Click to access the Assign Team from Project page to add activity team members from another activity team that is associated with the same project. See Copying Activity Team Members From Other Activity Teams.
Create Work Order	Click to access the Create Work Order page to create a work order in PeopleSoft Maintenance Management for this project activity. The system copies the project business unit, project, activity, activity schedule, and eligible resources to the Create Work Order page. The system also sends the default craft value to the Create Work Order page if you associated a craft with the resource's project role on the Project Role page. The **Create Work Order** button appears for projects if all of these conditions exist: • You use PeopleSoft Maintenance Management. • The project is managed in Project Costing. For Project Costing-managed projects, the **Work Order Managed** option is deselected on the Project Definitions - General Information page. • The project processing status is active. See Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing.
View Work Order	Click to access the Work Orders page to view a list of all work orders that are associated with the activity. The **View Work Order** link appears on this page based on the same conditions as the **Create Work Order** button.
Reported Time Chart	Click to access the Time by Activity page, which displays a graph of the reported time for activity team members.

View Activity Team Rates

Click the **Team Rates** link to access the Activity Team Standard Rate Sheet page to view the charge rates for activity team members and unassigned positions of the activity team.

See Viewing Team Rates.

Assign Team from Project Page (to a single activity team)

Use the Assign Team from Project page (PROJ_TEAM_COPY) to copy selected project team members and their schedules to a single activity team.

Navigation:

Click **Copy from Project** on the Activity Definitions - Team page.

Click **Copy from Activity** on the Activity Definitions - Team page to copy selected activity team members and their schedules to a single activity team.

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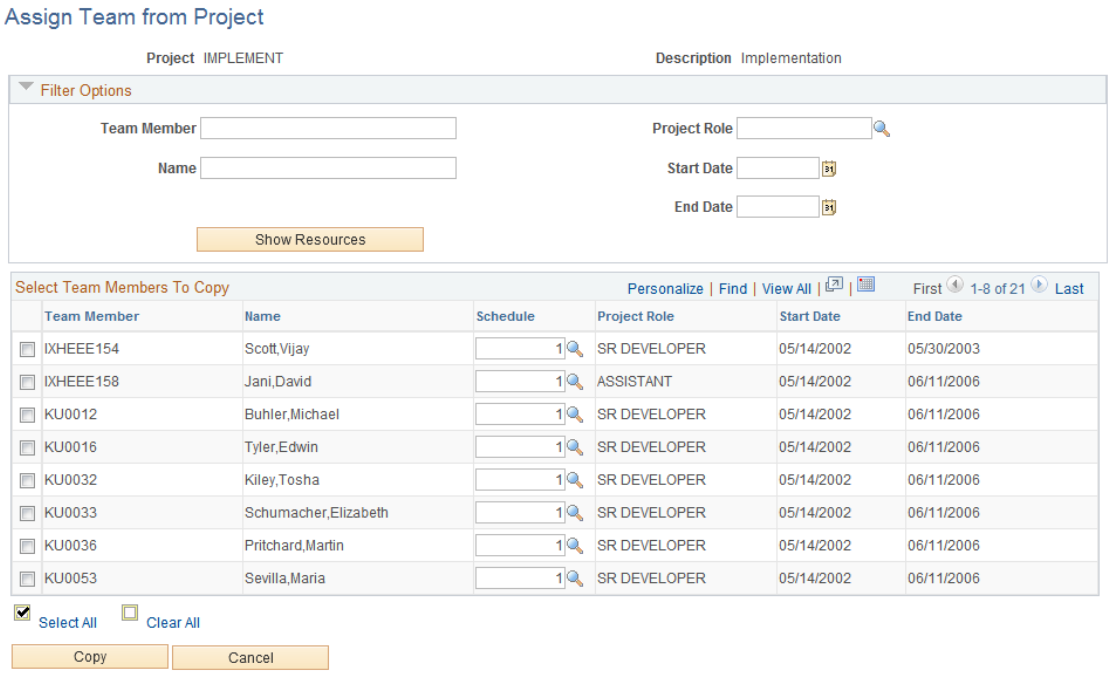
Project Costing, and then **Activity Definitions**, and then **Assign Team from Project**, and then **Assign Team from Project** to copy selected project team members and their schedules to multiple activity teams.

This example illustrates the fields and controls on the Assign Team from Project page (Copy from Project button). You can find definitions for the fields and controls later on this page.



To copy project team members to a single activity team, click **Copy from Project** on the Activity Definitions - Team page where you want to add team members.

Filter Options

When you first access this page, all eligible resources appear in the **Select Team Members to Copy** grid. Use the **Filter Options** collapsible group box to filter on various resource attributes so that you can more easily select project team members to add to an activity team.

Field or Control	Description
Team Member	Enter the employee ID of the team member that you want to appear in the **Select Team Members to Copy** grid.
Name	Use the format *<First Name Last Name>*, such as *Michael Buhler*, to search for a specific team member by name.
Project Role, Start Date, and **End Date**	Enter criteria to narrow the list of team members that appears in the **Select Team Members to Copy** grid.
Show Resources	Click to generate a new list based on the filter criteria.

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Select Team Members to Copy

Select individual project team members that you want to copy to the activity team, or click **Select All** for the system to select all project team members to copy.

Field or Control	Description
Schedule	Select each project team member's schedule that you want to apply to the activity team.
Copy	Click to access the Activity Definitions - Team page with the selected project team members added to the **Activity Team Members** grid. Save the page to complete the copy process.

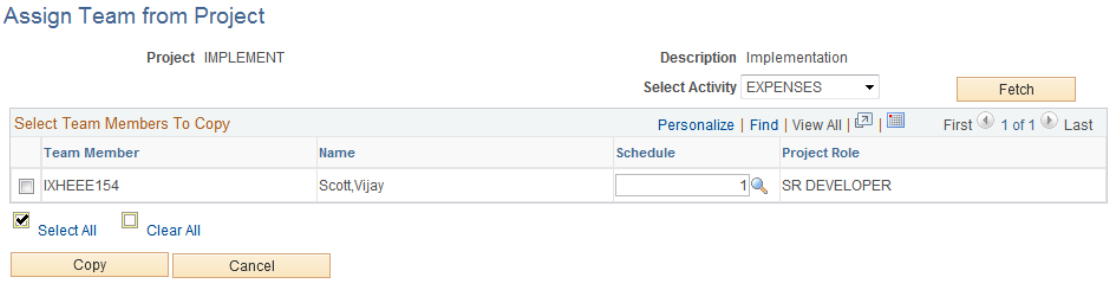
Copying Activity Team Members From Other Activity Teams

Use the Assign Team from Project page (PROJ_TEAM_COPY) to copy selected activity team members and their schedules to a single activity team.

Navigation:

Click **Copy from Activity** on the Activity Definitions - Team page.

This example illustrates the fields and controls on the Assign Team from Project page (Copy from Activity button). You can find definitions for the fields and controls later on this page.



To copy team members from one activity team to another, click **Copy from Activity** on the Activity Definitions - Team page where you want to add team members.

Field or Control	Description
Select Activity	Select the activity from which you want to copy team members.
Fetch	Click to retrieve the list of activity team members from the selected activity.

Copying Project Team Members to Multiple Activity Teams

Use the Assign Team from Project page (PROJ_TEAM_COPY) to copy selected project team members and their schedules to multiple activity teams.

Navigation:

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Project Costing, and then **Activity Definitions**, and then **Assign Team from Project**, and then **Assign Team from Project**

Use the menu navigation to access the Assign Team from Project page for the project. Select the project team members and schedules, and click **Next** to access the Select activities for resources/requirements page to complete the process of adding project team members to multiple activity teams.

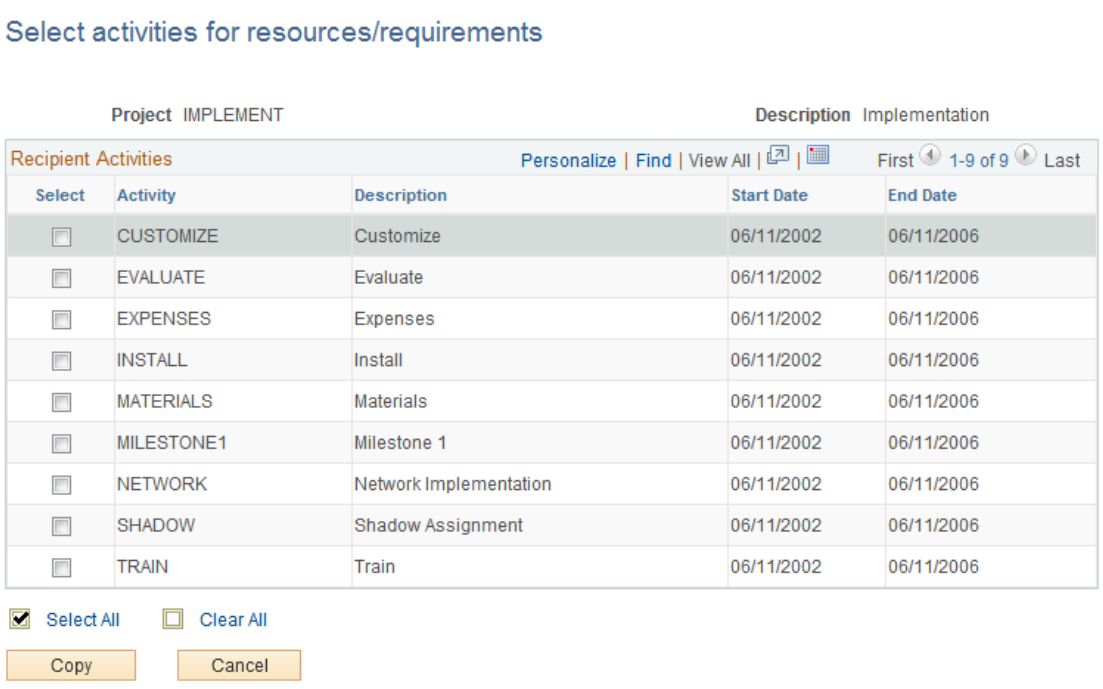
Select Activities for Resources/Requirements

Use the Select activities for resources/requirements page (PC_TEAM_ACT_SELECT) to select the activity teams to which you want to copy the project team members that you selected on the Assign Team from Project page.

Navigation:

Click **Next** in the Assign Team from Project page. The **Next** button is available only on the Assign Team from Project page that you access by using the navigation path **Project Costing**, and then **Activity Definitions**, and then **Assign Team from Project.**

This example illustrates the fields and controls on the Select activities for resources/ requirements page. You can find definitions for the fields and controls later on this page.



Use this page to complete the process of adding project team members to multiple activity teams.

Field or Control	Description
Recipient Activities	Select the activities to which you want to copy the selected team members and schedules.

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Field or Control	Description
Copy	Click to complete the copy process to each of the selected activity teams. A status message appears on the page, indicating that the new team members are added to the selected activities.

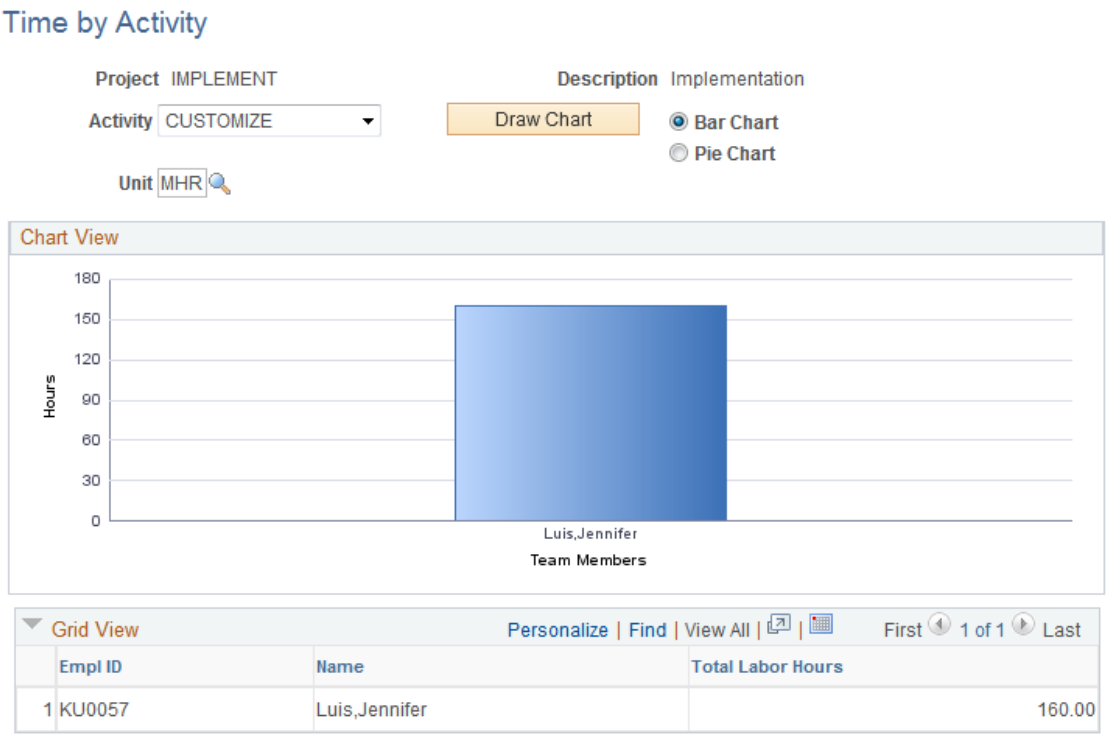
Time by Activity Page

Use the Time by Activity page (PC_LABOR_ACT_TIME) to review reported time by activity and team members. The system retrieves transactions from the Project Transactions Summary table (PC_SUMMARY_TBL) for transactional rows with an analysis type in the LABOR analysis group.

Navigation:

Click the **Reported Time Chart** link on the Activity Definitions - Team page.

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



You can select a different project activity, unit of measure, and type of chart, as desired, and click **Draw Chart.**

Click inside a charted area on the Time by Activity page for a specific employee to view a chart showing the amount of time that the employee reported on all activities for the project.

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11

Working with Transactions

Viewing and Adding Transactions

Pages Used to View and Add Transactions

Page Name	Definition Name	Usage
Transaction List Page	PROJECT_EXPRESSG	View transactions that belong to a project activity. This page operates in deferred processing mode.
Transaction Detail Page	PROJ_EXPR_ENTRY_PG	Maintain detailed information on a specified transaction.
Show All Transaction Details Page	PROJECT_EXPRESS_02	View detailed information from all of the Project Costing feeder systems that are associated with a single transaction line.
(Application) Detail Transactions Page	(depends on the application)	View detailed information for transactions that originate from other applications.
Add Transactions Page	INTFC_PROJ_EXPR_02	Add transactions to an active project activity.

Transaction List Page

Use the Transaction List page (PROJECT_EXPRESSG) to view transactions that belong to a project activity.

This page operates in deferred processing mode.

Navigation:

Project Costing, and then **Transaction Definitions**, and then **Review Transaction List**. Enter search criteria and click the **Search** button.

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

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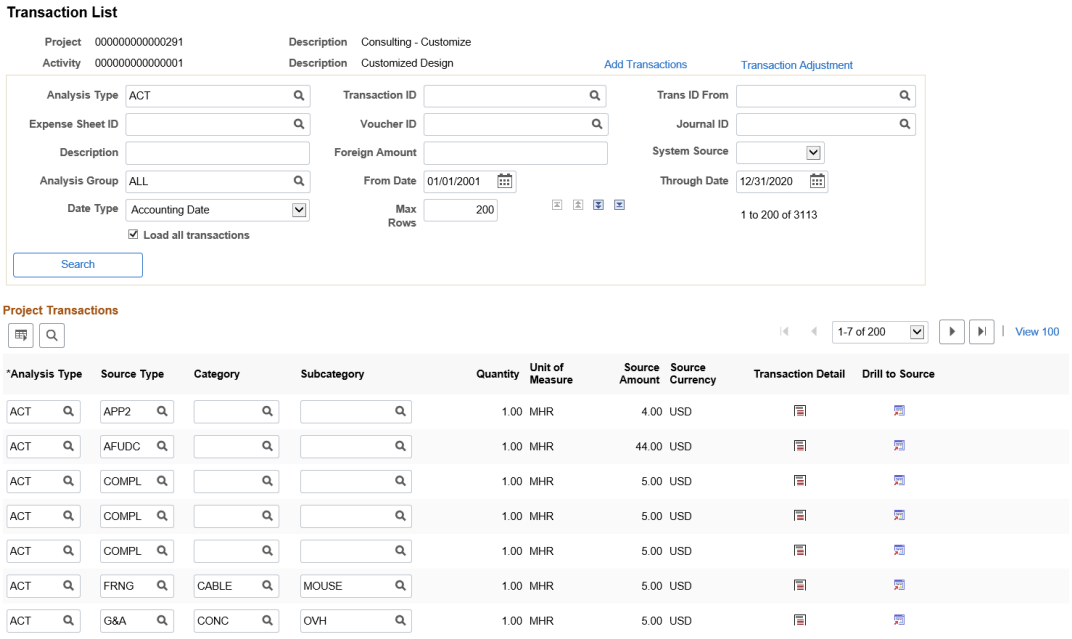

Field or Control	Description
Search,	Enter search criteria to narrow down the list of project transactions. For example, enter the analysis group that contains the type of transactions that you want to view. You can view only the transactions that belong to analysis groups to which you have been granted security access. Therefore, not all transactions may be accessible. The default value is based on your user preferences.
Date Type, **From Date**, and **Through Date**	Enter search criteria for the transactions that you want to view. The default value for the **Date Type** field is *Acct Date* (accounting date). The default values for the **From Date** and **Through Date** fields are based on your user preferences.
Max Rows	Enter the maximum number of rows for the system to display in the Transaction List. The default value is *200*. If the activity has more transactions than the value that you enter in this field, use the navigation arrow icons **(First Item, Previous Item, Next Item,** and **Last Item)** to scroll through all transactions.
Load all transactions	Select the checkbox to load all the transaction detail rows that appears, on clicking the Transaction Detail icon for the displayed project transactions. If this check box is not selected then only specific transaction details are displayed. By default this checkbox will be selected.

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Field or Control	Description
Search	Click to retrieve the transactions from the Project Transaction table that match the search criteria.

Project Transactions

Field or Control	Description
	Click the **Transaction Detail** icon to access the Transaction Detail page, where you can view more detailed information for a particular transaction.
	Click the **Drill to Source** icon to navigate to the PeopleSoft application where the transaction originated. The system uses key values on the detail record to drill to the source transaction.
	Click the **Drill to Billing** icon to access PeopleSoft Billing information. This icon appears only if PeopleSoft Billing is installed, the value in the Billing Distribution Status field is *D* (distributed), the Billing Business Unit field is not blank, and the transaction contains an invoice number.

Summarized Transactions

If you are summarizing transactions, and:

- If the transaction contains key values of the source transaction and you click on the Drill to Source icon, then the system transfers you directly to the source transaction
- If the transaction does not contain the key values of the source transaction and you click on the Drill to Source icon, then the system transfers you to the Detail Transactions page for the source application.

For more information about summarizing transactions,

See Understanding Feeder and Pricing Summarization.

Transaction Detail Page

Use the Transaction Detail page (PROJ_EXPR_ENTRY_PG) to maintain detailed information on a specified transaction.

Navigation:

Click the **Transaction Detail** icon on a row in the **Project Transactions** grid on the Transaction List page.

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

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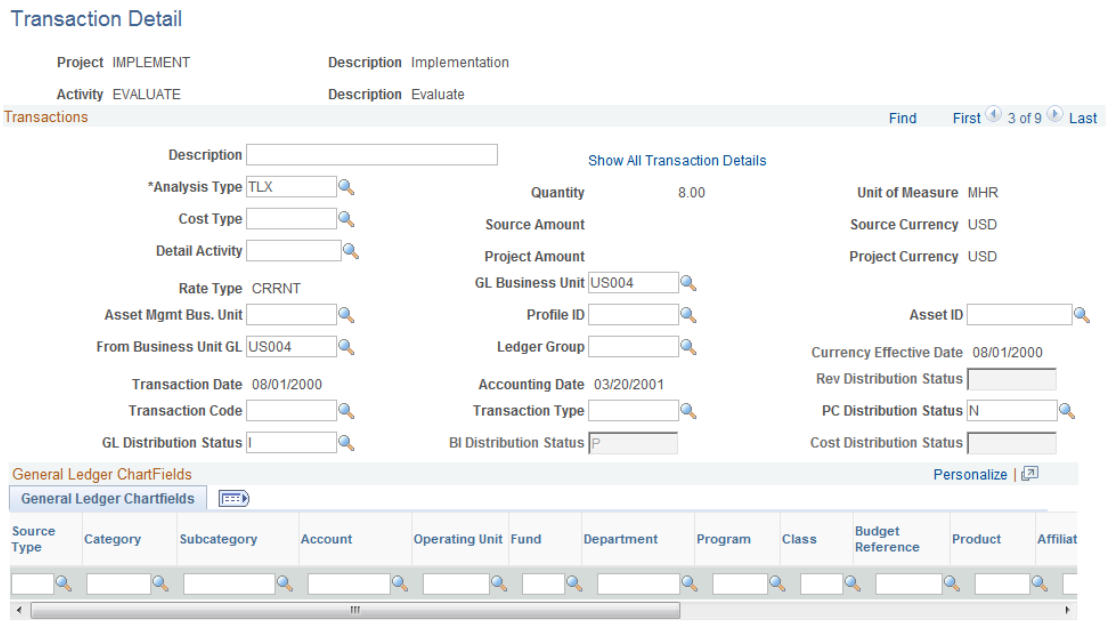

Use this page to:

- View transaction detail and ChartField information.
- Manually associate an asset ID to a transaction.
- Modify most transaction detail information, except for monetary values and dates.

> **Note**
>
> To maintain data integrity between feeder systems and Project Costing, make all transaction adjustments and modifications in the original source system and integrate the transactions back to Project Costing.

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Field or Control	Description
Detail Activity	Displays the detail activity ID that is used for charging time reports in PeopleSoft Expenses. The system uses this field only if all of these conditions exist: • PeopleSoft Program Management is installed. • The **Project Charging Level** option on the Project Definitions - Program Management page is set to an activity costing level of 1, 2, or 3 of the work breakdown structure. • The **Charging Level for Time Report** option is set to **All Detail Activities** on the Project Definitions - Program Management page. The **Detail Activity** field (ACTIVITY_ID_DETAIL) stores the detail activity that is used in time report charging. The **Activity** field (ACTIVITY_ID) stores the parent activity at the appropriate charging level.
Rev Distribution Status (revenue distribution status)	Modify the revenue distribution status to make the row eligible or ineligible for revenue pricing. Available values are: • *C:* Created • *D:* Distributed • *G:* Generated • *I:* Ignore • *N:* Not distributed You can not modify the field if the status is *D* (distributed).
GL Distribution Status (general ledger distribution status)	Modify the general ledger distribution status to make the row eligible or ineligible for submission to PeopleSoft General Ledger. Available values are: • *D:* Distributed • *G:* Generated • *H:* Hold • *I:* Ignored • *J:* Creating journals • *M:* Modified • *N:* None • *P:* To be processed You can not modify the field if the status is *D* (distributed).

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Field or Control	Description
BI Distribution Status (billing distribution status)	Displays the PeopleSoft Billing distribution status. Modify the billing distribution status to make the row eligible or ineligible to price for billing. You can only modify this field when the current value in the **BI Distrib Status** field is *I, N,* or *U*.Available values are: • *D:* Distributed; already billed. • *I:* Ignore; not to be billed. • *N:* New; not distributed. • *P:* Priced. • *U:* Unbillable/nonbillable. • *W:* Worksheet; billing calculations are in the Project Costing Billing Worksheet.
Cost Distribution Status	Modify the cost distribution status to make the row eligible or ineligible for cost pricing. Available values are: • *C:* Created • *D:* Distributed • *G:* Generated • *I:* Ignore • *N:* Not distributed You can not modify the field if the status is *D* (distributed).
Profile ID	Enter an asset profile ID that is used by PeopleSoft Asset Management and Project Costing. See Setting Up and Using Manual Capitalization.
Asset ID	Enter an asset ID that is used by PeopleSoft Asset Management and Project Costing.

Show All Transaction Details Page

Use the Show All Transaction Details page (PROJECT_EXPRESS_02) to view detailed information from all of the Project Costing feeder systems that are associated with a single transaction line.

Navigation:

Click the **Show All Transaction Details** link on the Transaction Detail page.

(Application) Detail Transactions Page

Use the <Application> Detail Transactions page ((depends on the application)) to view detailed information for transactions that originate from other applications.

Navigation:

Project Costing, and then **Transaction Definitions**, and then **Review Transaction List**. Click the Drill to Source icon on the Transaction List page.

Use this page to view the source of a transaction.

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If you are using Feeder Summarization, you can view the detail of the summarized transactions. The page title and the Project Transactions grid are determined by the system source of the transaction:

System Source	Page Title	Project Transactions Grid
BEX	Expenses Detail Transactions	PC_EX_DETAIL
BGL	General Ledger Detail Transactions	PC_GL_DETAIL
BTL	Time and Labor Detail Transactions	PC_TL_DETAIL

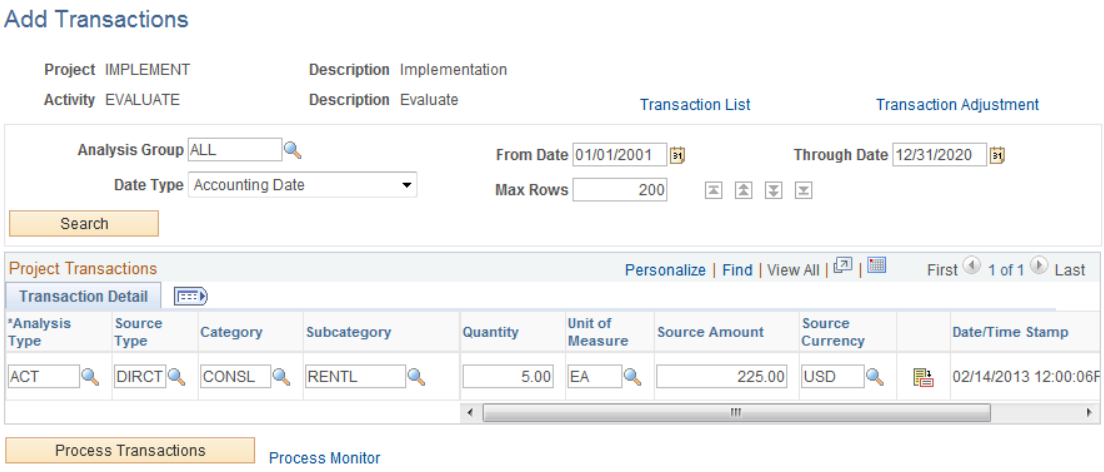
Add Transactions Page

Use the Add Transactions page (INTFC_PROJ_EXPR_02) to add transactions to an active project activity.

Navigation:

Project Costing, and then **Transaction Definitions**, and then **Add Transactions**, and then **Add Transactions**

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



To add a transaction:

1. Enter an analysis type for each transaction entered.

   You can enter transactions for only the analysis types that are in the specified analysis group.

> **Note**
>
> Budgetary ChartFields cannot be selected on this page. Therefore, budget rows cannot be added on this page.

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2. Enter the source transaction amount and select the source currency for the transaction.

   If the transaction currency is different from the base currency of the project business unit, the system automatically converts the transaction amount to the business unit's base currency based on the incoming transaction rate type that is established for the business unit. For example, if the business unit's incoming transaction rate type is *Source,* the system converts the transaction amount to the business unit's base currency by using the default conversion rate type that is established for your user ID (the user ID of the person who is logged in to the system). However, if the business unit's incoming transaction rate type is *Projects BU,* the system converts the transaction amount to the business unit's base currency by using the default rate type that is specified for the business unit. The converted amount is displayed in the **PCBU Transaction Amount** field on the Transaction Detail page.

   You set up rate type default values on the User Preferences - Project Costing page.

   > **Note**
   >
   > If you enter an account in the **General Ledger ChartFields** grid on the Transaction Detail page that requires a statistics code, you must enter the statistics code for the transaction.

3. Click **Save** to save the data in the Project Transaction Interface staging table (INTFC_PROJ_RES).

4. Click **Process Transactions** to load the rows into the Project Transaction table (PROJ_RESOURCE) and trigger these actions:

   - Commitment Control budget-checks transactions before sending them to the Project Transaction table if the Commitment Control feature is enabled for Project Costing.
   - The Pricing Application Engine process (PC_PRICING) creates target transaction rows if the source transaction is eligible for pricing.

> **Note**
>
> If Commitment Control is enabled for Project Costing, or if Projects Budgeting is enabled, you cannot add transactions on this page with analysis types that belong to the **Cost Budget** and **Revenue Budget** analysis groups that are specified on the Project Costing Definition page for the project. Use the appropriate budgeting application to enter these types of transactions.
>
> To create a revenue transaction row that will be budget checked in Commitment Control, enter a negative value (credit). Failure to do so results in an increased revenue budget.

Related Topics

- Defining Accounting Rules
  To define accounting rules, use the Accounting Rules component (PSA_ACCT_SETUP). Use the PSA_ACCT_SETUP_CI component interface to load data into the tables for this component.
- Understanding Integration with PeopleSoft General Ledger
  PeopleSoft Project Costing has a built-in integration with PeopleSoft General Ledger by way of the Journal Generator Application Engine process (FS_JGEN). The Journal

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Generator process transforms accounting entries into journal entries that you can post to PeopleSoft General Ledger.

- Application Fundamentals: Installation Options - Project Costing Page
- Application Fundamentals: User Preferences – Project Costing Page
- PeopleSoft General Ledger: Understanding Statistical Journals

Processing Multiple Currencies

Page Used to Reconcile Currency

Page Name	Definition Name	Usage
Convert Currency Page	RUN_PC_M_CUR	Convert transactions in Project Costing from the original currency to the project business unit's base currency.

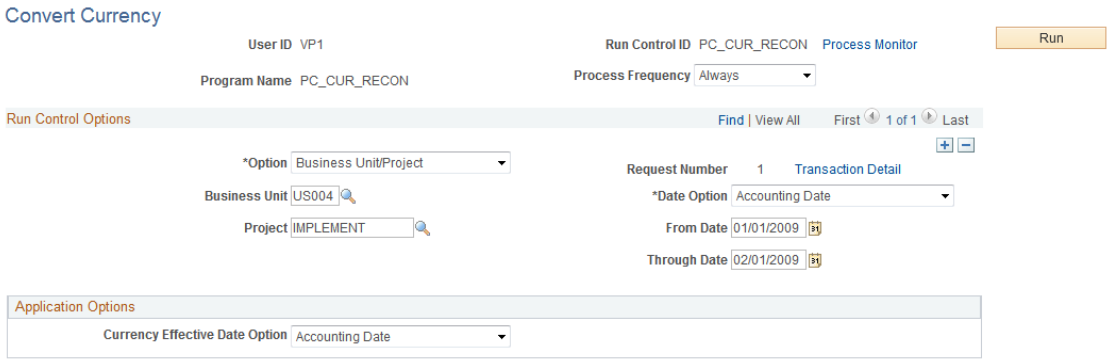
Convert Currency Page

Use the Convert Currency page (RUN_PC_M_CUR) to convert transactions in Project Costing from the original currency to the project business unit's base currency.

Navigation:

Project Costing, and then **Utilities**, and then **Convert Currency**, and then **Convert Currency**

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



The Currency Conversion process (PC_CUR_RECON) process converts transactions from the currency code of the source to the currency code of the project business unit for transactions that have not been converted to the currency of the project business unit.

> **Note**
>
> Currency values are revalued by feeder system processes such as PC_GL_TO_PC.

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Field or Control	Description
Option	Select to convert currency for all projects and activities, or for specific ones. Options are: • *All:* Convert currency for all activities. • *Business Unit:* Convert currency for a selected business unit. • *Business Unit/Project:* Convert currency for a selected business unit and project. • *Business Unit/Project/Activity:* Convert currency for a selected business unit, project, and activity.
Transaction Detail	Click to access the Transaction List page to search for and view transactions. You must save the Convert Currency page before you click the **Transaction Detail** link.
Date Option	Select *Accounting Date, All,* or *Transaction Date* for the system to use to determine eligible transactions.
From Date and **Through Date**	Enter the date range of the eligible transactions. These fields appear if you select a date option of *Accounting Date* or *Transaction Date.*
Currency Effective Date Option	Select one of the following: • *Accounting Date:* Each transaction row's currency effective date is set to the row's accounting date. • *Transaction Date:* Each transaction row's currency effective date is set to the row's transaction date. • *Value:* Each transaction row's currency effective date is set to the currency effective date that you enter in the **Application Options** group box. The **Currency Effective Date** field appears only when you select *Value* as the currency effective date option.
Run	Click to initiate the Currency Conversion process.

See also, *PeopleTools: PeopleSoft Process Scheduler*

Controlling Incoming Transactions

You can control the entry of transactions into Project Costing by using the processing status or status control options.

This topic discusses:

- Changing the Project or Activity Processing Status.
- Using Status Control Options.

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Changing the Project or Activity Processing Status

You can control incoming transactions at the project or activity level. Projects and activities that have an inactive processing status do not appear in the prompt lists of PeopleSoft cost feeder systems. Inactivating a project or activity effectively shuts off the flow of all transactions to Project Costing for that particular project or activity.

Use the Project Definitions - Status page to select a project status that is associated with the desired processing status.

Use the Activity Definitions - General Information page to modify the activity processing status.

Related Topics

- Maintaining Project Status
- Maintaining Activity Status

Using Status Control Options

You can use status control options to selectively control specified transactions based on analysis types and effective dates. By using status control options, you can stop transactions from a feeder system or the Add Transactions component (INTFC_PROJ_EXPRESS) if a project or activity status changes on the Project Definitions - Status page or Activity Definitions - Status page.

For example, assume that you set up the Hold status and associate a Reject project control action with an ACT analysis type. Then you change the status of the TRAINING project to Hold. The system will prevent further transactions from entering Project Costing with an ACT analysis type for the TRAINING project.

To control transactions using status control options:

1. Select the **Enable Status Control** option on the Installation Options - Project Costing Integration page.
2. Select the analysis type and control action in the **Status Control** group box on the Status Types page.
3. Change the status of the project or activity on the Project Definitions - Status page or Activity Definitions - Status page.

You can further define the option by using an effective date.

Related Topics

- Status Types Page
  Use the Status Types page (PROJ_STATUS_DEFN) to create status types and define control actions to limit transactions coming into Project Costing.
- Application Fundamentals: Installation Options - Project Costing Page

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12

Budgeting Project Costs and Revenue

Understanding Project Cost and Revenue Budgets

This topic discusses:

- Terminology that is relevant to project budgeting.
- Project budgeting setup steps.
- Process flow.
- Top-down budget distribution.
- Bottom-up project budgeting.
- Project charging levels.
- System-defined budget parameters.
- Budget items.
- Budget alerts.
- Finalizing budgets.
- Budget plan versions.

Terminology

This table describes terms that are relevant to project budgeting:

Term	Description
Bottom-up Estimating	Estimating the budget amount for individual periods, budget items, and activities, and rolling-up the individual estimates to calculate a project total.
Spreading	The allocation or distribution of budget amounts to project activities across time periods for budgetary or project performance measurement.
Budget Adjustment	The undistributed budget amount, or the amount of the budget that has not been distributed to periods.
Costing Activity	An activity to which budget amounts are assigned. These are activities at the activity costing level.
Distributed Budget	Represents budget amounts that have been distributed to periods. After you distribute a budget adjustment to periods, the system updates the distributed budget with that amount and changes the budget adjustment amount to zero.

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Term	Description
Estimating	Developing an approximation of the costs of resources needed to complete project activities. Resources can include labor, equipment, material, and so on. Estimates do not involve allocating or distributing costs across time periods for budgetary or project performance measurement.
Project Charging Level and Activity Costing Level	The project charging level is the level in the work breakdown structure (WBS) at which project budgets are maintained. If you use PeopleSoft Program Management, you can select a project charging level of either the detail activity level, or an activity costing level that is a higher WBS level than detail activities. If you use PeopleSoft Project Costing without PeopleSoft Program Management, the project charging level is always the detail activity level.
Target Budget	The sum of a budget adjustment and the distributed budget. The budget adjustment can be added to or subtracted from the distributed budget to calculate the target budget.
Top-down Estimating	Typically uses the actual cost of a previous, similar project, or a lump sum of money that is available for a project, as the basis for estimating the cost and revenue of the current project and applying it to down to the activity, budget item, and period level.

Project Budgeting Setup Steps

This table lists the high level steps to enable and set up project budgeting and provides a link to the documentation that discusses the step:

Setup Step	Documentation
Establish budget period calendars. Optionally establish summary budget period calendars to use budget period roll-up functionality.	See PeopleSoft Commitment Control: Defining Commitment Control Budget Period Calendars.
Enable projects budgeting and establish the default settings for the budget calendar, number of budget periods, and analysis groups at the installation level.	See Application Fundamentals: Installation Options - Project Costing Page.
Define budget items at the system level.	See Budget Items Page.
Set up cost budget alert thresholds for the business unit that appear as default settings for all project budgets that belong to that business unit.	See Project Costing Options - Budget Alerts (business unit) Page.
Set up budget plan version analysis types and enable budget row versioning for the business unit to create different cost or revenue budget plan versions.	See Budget Row Versioning Page.

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Setup Step	Documentation
If you use PeopleSoft Program Management, at the Project Costing installation level enable users to choose the general ledger (GL) business unit and department distribution when creating budget detail rows by using the Get Plan feature.	See PeopleSoft Program Management: Understanding Cost and Revenue Budget Generation.

Process Flow

Project Costing supports top-down project budgeting, bottom-up project budgeting, and the ability to adjust existing project budgets.

This diagram shows the bottom-up and top-down project budgeting process flow in Project Costing:

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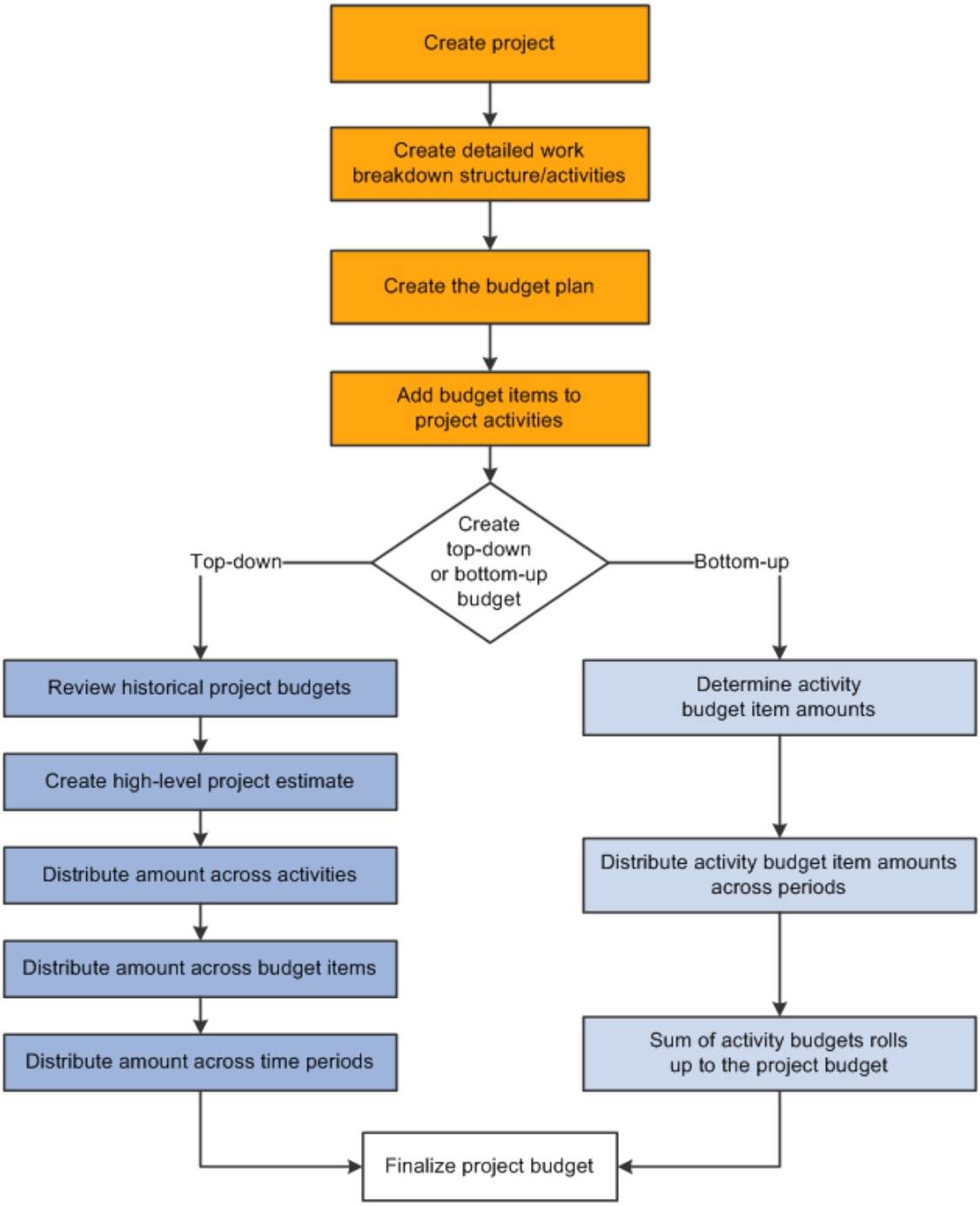

You can simplify the process of creating budgets by using project templates. For example, you can create a project template that contains the detailed work breakdown structure, budget plan, and budget items that are associated with the project activities. Use the template to populate new projects with the preset budget information. You can modify the project template, or create multiple templates to meet your business needs.

Top-down Budget Distribution

The main steps to create budgets from the top down are:

1. Enter a high-level estimate for the project on the Budget Plan page.

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Use this page to enter budget scenarios for the project. Budget plans provides a high level definition of the total budget for each project budget under consideration.

2. (Optional) Distribute the estimate down to summary activities on the Budget Detail page.
3. Distribute the estimate down the WBS to costing activities on the Budget Detail page.

   Use this page to define a specified project budget at a greater level of detail by using budget items.
4. Adjust budget amounts for budget items on the Project Budget Items - Adjust Budget Items page.

   Use this page to spread the budget amounts to budget items on costing activities.
5. Distribute the estimate across periods on the Project Budget Periods - Adjust Budget Periods page.

   Return to this page to distribute the budget item budget adjustment across budget periods.
6. Choose one cost and one revenue budget plan and finalize the plans.

   Finalizing a budget plan sends the budget data to the Project Transaction Interface staging table (INTFC_PROJ_RES) and initiates a process to determine if the budget transactions go directly to the Project Transaction table (PROJ_RESOURCE). If Commitment Control is active for Project Costing and the GL business unit and ledger group combination, the rows must first go through Commitment Control.

   You can finalize only active plans.

You distribute project-level cost estimates across the WBS for detail activities, budget items, and time periods by using one of the distribution options listed in this table:

Distribution Option	Description
Percentage spread	Enter adjustments at the project or summary activity level and spread the adjustment based on the percentages entered for each child costing activity under that project or summary activity. Percentages entered must equal 100 percent.
Even spread	Enter adjustments at the project or summary activity level and spread the adjustment evenly to each child costing activity under that project or summary activity.
Adjust by amount	Enter adjustments at the project or summary activity level and spread the adjustment manually to each child costing activity under that project or summary activity by amount, or adjust particular activities directly.
Adjust by percentage	Directly adjust specific activities by percentages based on previously distributed amounts.

You can enter negative percentages and amounts for activities, budget items, and periods.

Bottom-up Project Budgeting

After you create a detailed WBS and budget plan in Project Costing, you can create budget details by estimating amounts by period for budget items and rolling up the amounts to the activity and project levels.

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For example, you can enter revised period budget amounts at the budget item level, which roll up to the activity level. If the sum of the revised budget item amounts is different than the previous activity budget amount, you can override the previous activity budget amount. The sum of the revised activity budget amounts rolls up automatically to the project level.

Calculate Budget Amount Based on Employee, Job Code, or Project Role

You have the option to calculate period budget amounts by selecting a rate by employee, job code, or project role. You can enter a quantity, unit of measure, and rate calculation basis for a period, and the system calculates the period budget amounts that roll up to the budget item, activity, and project level.

The Calculate Amount From Quantity feature performs in a similar manner as a worksheet. For example, assume that you want to calculate the budget amount for 100 hours of labor by using predefined rates. First you want to view the calculations based on employee, job code, and project role rates, after which you will determine which rate to use. These are the typical steps to accomplish this scenario:

1. On the Project Budget Items - Adjust Budget Items page, add the labor budget item to the project activity.
2. On the Project Budget Periods - Adjust Budget Periods page:
    a. Select the *Adjust by Amount* spread option.
    b. Enter a quantity of 100 and unit of measure of work hours for a budget period.
    c. Click the **Calculate Amount** button to access the Calculate Amount From Quantity page.
3. To view the calculation by employee rate:
    a. Select a rate calculation basis of *Employee ID* on the Calculate Amount From Quantity page.
    b. Select a specific employee ID from the list of available employees.
    c. Click **OK** to return to the Project Budget Periods - Adjust Budget Periods page and view the calculated budget amount.
4. To view the calculations by job code or project role rates:
    a. Click the **Calculate Amount** button again to return to the Calculate Amount From Quantity page.
    b. Select the rate calculation basis, select the detail row, and click **OK** to return to the Project Budget Periods - Adjust Budget Periods page.

       The system clears the previous calculated amount and displays the new results. Repeat this process as many times as needed for each period row.
5. When you reach the desired the budget adjustments, click **Distribute Budget** to update the distributed budget and target budget amounts.

Distribute Costs to Budgets Process in Program Management

If you use PeopleSoft Program Management, you can generate a bottom-up project cost and revenue budget from the amounts defined on the Resources by Activity page. You can click the **Get Plan** button on the Budget Plan page to trigger the Distribute Costs to Budgets Application Engine process (PGM_SPREAD). This process creates budget detail rows based on activity resource amounts. If the budget plan has a cost budget type, the cost amounts from the Resources by Activity page are used for the detail budget rows. If the budget plan has a revenue budget type, the bill amounts from the Resources by Activity page are used for the detail budget rows.

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See PeopleSoft Program Management: Understanding Cost and Revenue Budget Generation.

Project Charging Levels

If you use PeopleSoft Program Management, you can take advantage of a flexible project activity model that supports both a detail WBS for planning, and a cost breakdown structure for accounting. You can use different levels of the WBS for project management and accounting by defining the WBS level at which you want to track project budgets and costs. You can specify a project charging level of WBS level 1, level 2, or level 3, and the system restricts charges to summary and detail activities that are in the specified level. You can also specify a project charging level of all detail activities, in which case you can capture costs on detail activities, but not on summary activities—regardless of an activity's WBS level.

If you use PeopleSoft Project Costing without PeopleSoft Program Management, the project charging level is all detail activities.

See PeopleSoft Program Management: Understanding Project Charging Levels.

Budget Items

Budget items are one of the building blocks of a project budget. Initially, the system uses budget items to establish default ChartField values for budget rows. Later, budget items provide a way of identifying and grouping transactions that the system uses to identify a project activity's budget costs or revenue for a given period.

Project budgeting uses the fields defined on the budget item to match with actual amounts in project transactions. Only those transactions that match the defined ChartField values are counted as actuals for a given budget item.

Budget Alerts

You can establish cost budget alerts that warn the project manager of potential cost overruns at the project or activity level. The system compares budget amounts with values on the Summary Budget Data table (PC_BUD_SUMMARY), which stores summarized actual costs.

Although budget alerts are not processed at the business unit level, you establish cost budget alerts for the business unit that appear as default values for all project budgets belonging to that business unit. Cost budget alerts that you establish at the project level can be used as default values for project activities. You can override default settings at the project and activity levels.

Budget alerts appear on the Budgets vs Actuals interactive report.

Finalizing Budgets

You can define multiple cost budget plans and revenue budget plans for a project, and designate one cost budget plan and one revenue budget plan as active. After you distribute all summary budget amounts to costing activities, budget items, and periods, you can finalize the active plans.

Finalizing a budget plan sends the budget data to the Project Transaction Interface table and initiates the PC_WRAPPER Application Engine program which calls the Load Third-Party Transactions Application Engine process (PC_INTFEDIT). The Load Third-Party Transactions process triggers the Project Costing to Commitment Control Application Engine process (PC_TO_KK), which determines if the budget transactions must go through Commitment Control before they are posted to the Project Transaction table.

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If Commitment Control is not required, the process sends the rows directly to the Project Transaction table. You can modify rows on the finalized budget plan and refinalize the plan, which updates the budget amounts on the Project Transaction table. You can also inactivate the previous finalized plan, and activate and finalize a different plan, which replaces the previous budget transactions with new finalized budget transactions on the Project Transaction table.

If Commitment Control is required, the Project Costing to Commitment Control process sends budget rows and cost transactions that require budget-checking to Commitment Control. With Commitment Control you cannot finalize another plan of the same budget type (cost or revenue) and analysis type. You can, however, add new rows on the Budget Detail page and refinalize the budget plan.

Finalizing a budget plan also triggers the Refresh Budget Summary Application Engine process (PC_BUD_SUM) to summarize budget data in the Summary Budget Data table.

After you finalize a budget you can run a Budgets to Costs Review by Period report (PCY1050.RPT) to perform budget versus cost analysis, or use the Budget vs. Actual interactive report to compare budgeted amounts with actual costs.

See Project Costing to Commitment Control Process.

Budget Plan Versions

You can retain a historical version of the budget plan transaction rows each time that you finalize a budget. Historical budget plan versions are stored in the Project Transaction table along with the current, finalized budget rows. Each historical budget version is uniquely distinguished by analysis type, and can be used for analysis and reporting. You can control budget plan versions by business unit.

By using budget row versioning, the first time that you finalize a project's budget plan, the system creates a copy of the plan and assigns a unique analysis type to budget rows in the plan copy. The new analysis type distinguishes these rows as historical budget plan version sequence one. The original analysis type remains unchanged on the current, finalized budget rows.

If you modify and refinalize the existing budget plan, or activate and finalize a different plan for the project, the system again creates a copy of the new plan and assigns a unique analysis type to budget rows in the plan copy. The new analysis type distinguishes these rows as historical budget plan version sequence two.

You configure the budget version analysis types, and the sequence in which they are used, by business unit. PeopleSoft delivers the following sequence of analysis types and analysis groups that you can use to distinguish historical cost and revenue budget versions:

Version Sequence	Cost Budget Version Analysis Type	Revenue Budget Version Analysis Type	Version Analysis Group
1	CV1 (Historical Cost Budget Version 1)	RV1 (Historical Revenue Budget Version 1)	HBPV1 (Historical Budget Version 1)
2	CV2 (Historical Cost Budget Version 2)	RV2 (Historical Revenue Budget Version 2)	HBPV2 (Historical Budget Version 2)
3	CV3 (Historical Cost Budget Version 3)	RV3 (Historical Revenue Budget Version 3)	HBPV3 (Historical Budget Version 3)

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Version Sequence	Cost Budget Version Analysis Type	Revenue Budget Version Analysis Type	Version Analysis Group
4	CV4 (Historical Cost Budget Version 4)	RV4 (Historical Revenue Budget Version 4)	HBPV4 (Historical Budget Version 4)

You define these sequences at the business unit level, and use them at the project level. Each project independently uses the analysis type sequence for budget plan versions. The last analysis type used in the sequence is stored in the Project Header table (PS_PROJECT).

For example, assume that you finalize a new cost budget plan using the analysis type *BUD.* The system:

- Saves the budget detail rows with analysis type *BUD* in the Project Transaction table.
- Creates a copy of the finalized budget detail rows and updates the analysis type to *CV1* (Historical Cost Budget Version 1).
- Stores the copy of the budget detail rows with analysis type *CV1* in the Project Transaction table.

Next, assume that you refinalize the cost budget plan for the project. The system:

- Deletes the previously finalized budget detail rows with analysis type *BUD* from the Project Transaction table.
- Saves the new refinalized budget detail rows with analysis type *BUD* in the Project Transaction table.
- Creates a new copy of the refinalized budget detail rows and updates the analysis type to *CV2* (Historical Cost Budget Version 2).
- Stores the copy of the budget detail rows with analysis type *CV2* in the Project Transaction table.

The system does not retain a historical budget version in the Project Transaction table if:

- The project is commitment-controlled.
- The **Enable Budget Row Versioning** check box is not activated for the business unit on the Budget Row Versioning page at the time you finalize the budget.
- No budget analysis type sequence is defined on this page for the business unit.
- All of the analysis types in the budget analysis type sequence have been assigned to a budget version for the business unit.

By using budget row versioning you have the ability to preserve detailed budget rows in the Budgeting tables that match rows in the Project Transaction table. For example, assume that Budget Plan A is the active, finalized cost budget plan. The Project Transaction table contains budget rows with an analysis type of *BUD* for Budget Plan A, and a copy of Budget Plan A budget rows with an analysis type of *CV1.* Now you want to modify the budget plan. Instead of modifying and refinalizing Budget Plan A, you inactivate Budget Plan A and activate a new plan—Budget Plan B. When you finalize Budget Plan B, the system deletes the previous *BUD* rows for Budget Plan A from the Project Transaction table, creates new *BUD* rows for Budget Plan B, and creates a copy of the new Budget Plan B budget rows with an analysis type of *CV2.* Then if you want to view the detail rows in the Project Transaction table for analysis type CV1, you simply view Budget Plan A that contains identical rows.

You cannot use budget row versioning if you use Commitment Control.

See Budget Row Versioning Page.

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Setting Up Budgets in PeopleSoft Project Costing

Pages Used to Set Up Budgets in PeopleSoft Project Costing

Page Name	Definition Name	Usage
Application Fundamentals: Installation Options - Project Costing Page	INSTALLATION_PC	Enable projects budgeting, and establish the default settings for the budget calendar, periods, and analysis groups. If you use PeopleSoft Program Management, enable users to choose the general ledger business unit and department distribution for budget detail rows.
Budget Items Page	PC_BUD_ITEMS	Define and modify budget items.
Project Costing Options - Budget Alerts (business unit) Page	PC_BUD_BU_ALERTS	Define cost budget alert thresholds that appear as default settings for all project budgets that belong to the business unit.
Project Definitions - Budget Alerts Page	PC_BUD_PROJ_ALERTS	Define cost budget alert thresholds at the project level to alert the project manager when costs exceed the specified threshold. See Creating and Defining Projects
Activity Definitions - Budget Alerts Page	PC_BUD_ACT_ALERTS	Define cost budget alert thresholds to alert the project manager for potential cost overruns at the activity level.

Project Costing Options - Budget Alerts (business unit) Page

Use the Project Costing Options - Budget Alerts (business unit) page (PC_BUD_BU_ALERTS) to define cost budget alert thresholds that appear as default settings for all project budgets that belong to the business unit.

Navigation:

Setup Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Options**, and then **Budget Alerts**

> **Note**
>
> There are three Budget Alerts pages in Project Costing—one at the business unit level, project level, and activity level. The navigation path to these pages is based on whether you are defining the budget alert thresholds for the business unit, project, or activity. The field definitions that appear in this topic apply to all three pages.

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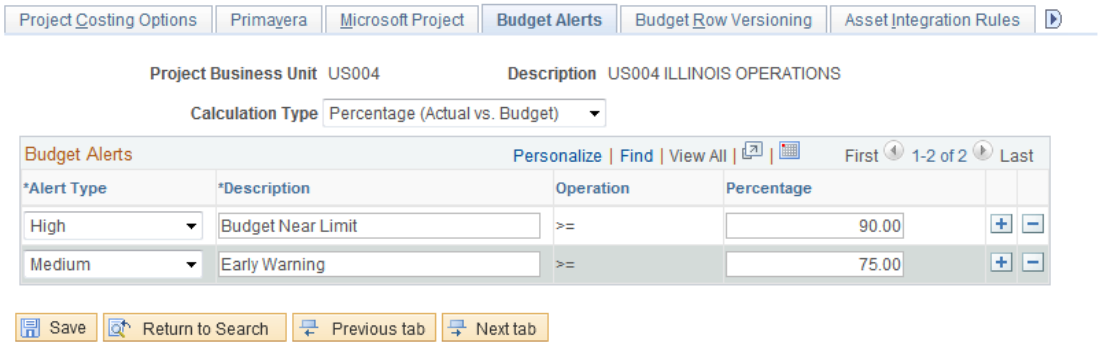
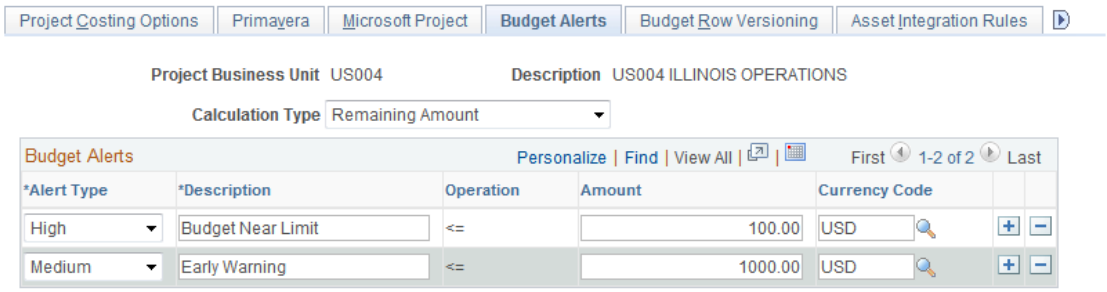
This example illustrates the fields and controls on the Budget Alerts page (Percentage calculation type). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Budget Alerts page (Remaining Amount calculation type). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Calculation Type	Select the method for calculating how the budget alert threshold is determined. Available options are: *Percentage (Actual vs. Budget):* Triggers the budget alert when the actual cost of the project reaches the defined percentage (entered in the **Percentage** field) of the budgeted amount. The calculation for this type of budget alert threshold is: (Actual Costs) ÷ (Budget Amount) x 100 ≥ (Percentage field value) *Remaining Amount:* Triggers the budget alert when the actual cost of the project reaches the defined remaining amount (entered in the **Amount** field) of the budgeted amount. The calculation for this type of budget alert threshold is: (Budget Amount) – (Actual Costs) ≤ (Amount field value)

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Field or Control	Description
Alert Type	Select the level of alert that you are defining. Available options are: *Medium:* Visual status indicator appears as an inverted yellow triangle on the Budget vs. Actual page. *High:* Visual status indicator appears as a red square on the Budget vs. Actual page. A *Low* visual status indicator appears as a green circle on the Budget vs. Actual page if actual costs have not reached the medium or high thresholds, or if you do not define budget alert thresholds.
Operation	Displays the operand that the system uses to define the calculation that determines the budget alert threshold. <= (less than or equal to): Appears when you select *Remaining Amount* as the calculation type. >= (greater than or equal to): Appears when you select *Percentage (Actual vs. Budget)* as the calculation type. This field is not editable.
Percentage	Enter the percentage of the budget that triggers the budget alert. This field appears only if you select *Percentage (Actual vs. Budget)* as the calculation type.
Amount	Enter the monetary amount of the budget that triggers the budget alert. This field appears only if you select *Remaining Amount* as the calculation type.
Copy to Activities	Select to use these values as default settings at the activity-level when you create new activities for the project. This field appears only on the Project Definitions - Budget Alerts page.

Creating and Defining Budget Plans

To create and define budget plans, use the Budget Plan (PC_BUD_GENERAL) and Project Budget Detail (PC_BUD_DETAIL) components.

Budget plans define the budget type (cost or revenue), status, currency, and time span. They also specify the analysis type for all budget transactions that you create for the plan.

Pages Used to Create and Define Budget Plans

Page Name	Definition Name	Usage
Budget Plan Page	PC_BUD_GENERAL	Create and view all budget plans associated with a project.

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Page Name	Definition Name	Usage
Budget Detail Page	PC_BUD_DETAIL	Enter a high-level budget adjustment for the project and then distribute the budget adjustment down the WBS to costing activities. If all budget adjustments are distributed across budget items, use this page to distribute the budget adjustments evenly across budget periods.
Project Budget Items - Adjust Budget Items Page	PC_BUD_ITM_DST_SEC	Distribute budget amounts to budget items for costing activities.
Project Budget Periods - Adjust Budget Periods Page	PC_BUD_PER_DST_SEC	Distribute budget amounts to budget periods for costing activities and budget items.
Calculate Amount From Quantity Page	PC_BUD_CALC_RT_SEC	Select a rate by employee ID, project role, or job code to use to calculate a budget row amount.
Copy From Another Plan Page	PC_BUD_COPY	Copy budget amounts from another plan, or copy previous versions of a budget plan to the current one.
Copy From Another Project Page	PC_BUDGET_COPY_SEC	Copy budget items from another project to the current one.

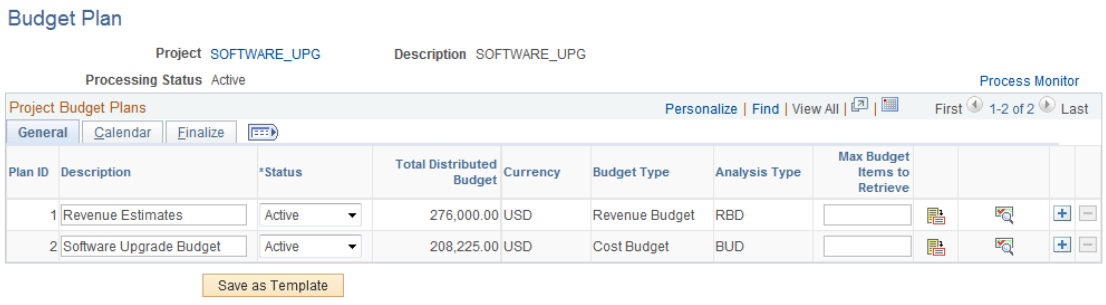
Budget Plan Page

Use the Budget Plan page (PC_BUD_GENERAL) to create and view all budget plans associated with a project.

Navigation:

Project Costing, and then **Budgeting**, and then **Budget Plan**, and then **Budget Plan**

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



You can create one or more budget plans for a project; however, you can finalize only two plans on this page—one cost budget and one revenue budget.

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Field or Control	Description
Project	Click the project ID link to access the Project Definitions - General Information page for the project in a new browser window. Close the new browser window to return to the Budget Detail page.

General

Select the **General** tab.

Field or Control	Description
Plan ID	Enter the identifier for this budget plan for the project. You cannot edit this field after the plan is saved.
Status	Select a status of *Active* or *Inactive* for each budget plan. Only two budget plans can be active at any given time—one cost budget plan and one revenue budget plan. You can finalize only active plans. **Note:** Changing the status of a budget plan does not trigger a process to load the budget rows into the Project Transaction table. The Project Transaction table contains budget rows from the most recent finalized budget plan, regardless of the budget plan status.
Total Distributed Budget and **Currency**	Displays the sum of the budget items that is distributed down to the period level.
Currency	Select the budget plan currency. The default value is based on the currency code defined on the Project Costing Definition page. You can override the default value at the budget plan level. You can modify the currency only if no detail budget rows exist for the budget plan.
Budget Type	Select the type of budget to create. Available options are: *Cost:* Select to create a cost budget to track actual costs associated with the project. *Revenue:* Select to create a revenue budget for projected revenue. You can modify the budget type only if no detail budget rows exist for the budget plan.

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Field or Control	Description
Analysis Type	Enter the cost or revenue analysis type for the system to use to select transaction rows from the Project Transaction table to summarize and use on project analysis pages. Available analysis types are based on the analysis groups defined in the **Cost Budget** field (AN_GRP_ACTV_BUD) and **Revenue Budget** field (PC_REV_BUD_AN_GRP) in the **Analysis Group Options** group box on the Project Costing Definition page. You can change the analysis type only if no detail budget rows exist for the budget plan. **Note:** If Commitment Control is required, you cannot finalize another plan of the same budget type (cost or revenue) and analysis type.
Max Budget Items to Retrieve	Enter a value to control how many budget items are initially displayed on the Budget Detail Page. A value of 0 (zero) displays all budget items, which is recommended unless the you are experiencing performance issues. This field can be used to improve the time required to initially display the page for budget plans that may have many activities or budget items. A value can default into this field if it is defined on the Application Fundamentals: Installation Options - Project Costing Page.
	Click the **Budget Detail** icon to access the Budget Detail page for the corresponding plan.
	Click the **Budget versus Actual** icon to access the Budget versus Actual page.
Get Plan	Click to use the Distribute Costs to Budgets process to create budget details based on the amounts on the Resources by Activity page in PeopleSoft Program Management. This button appears only if you use PeopleSoft Program Management See PeopleSoft Program Management: Entering Distribute Costs to Budget Detail Rows.
Refresh Analytics	Click to trigger the Refresh Budget Summary process to run in the background and update the Summary Budget Data table so that the latest budget information is available for reports and analytics before the budget is finalized. This button appears only if you use PeopleSoft Program Management. **Note:** The Refresh Budget Summary process runs automatically during the Project Costing budget finalization process.

Calendar

Select the **Calendar** tab.

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Field or Control	Description
Calendar ID	Select the calendar that represents the interval in which the budget plan will be tracked based on the PeopleSoft General Ledger calendar that you are using. The default value is based on the **Default Calendar ID** field in the **Projects Budgeting Options** group box on the Installation Options - Project Costing page. **Note:** You cannot save the budget plan if the number of calendar periods between the budget plan start and end dates is less than the value that you enter in the **Number of Periods** field. See Application Fundamentals: Installation Options - Project Costing Page.
Start Date	Enter the start date of the budget plan. The default value is based on the project start date, which you can override when you create the budget plan.
Number of Periods	Select the number of periods in the budget plan. The default value is based on the **Default Number of Periods** field in the **Projects Budgeting Options** group box on the Installation Options - Project Costing page. This number is unlimited. **Note:** You cannot save the budget plan if the selected **Calendar ID** has fewer periods between the budget plan start and end dates than the value that you enter in this field. See Application Fundamentals: Installation Options - Project Costing Page.

Commitment Control

Select the **Commitment Control** tab. This tab appears only if you enable Commitment Control for Project Costing on the Installation Options - Project Costing Integration page.

Field or Control	Description
Security Status	Displays the security status that is invoked during the budget finalization process. Values are: *None:* Indicates that there are no security errors. *Security Error:* Indicates that a security error occurred during the finalization process. For more information about Commitment Control Security, see PeopleSoft Commitment Control: Understanding Commitment Control Security.

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Field or Control	Description
Exceptions	Click the **Exceptions** icon in the corresponding row to access the Review Commitment Control page and correct the transactions that created an error during the submission to Commitment Control. After the budget transactions successfully post to Commitment Control, they are deleted from the Commitment Control staging tables and are no longer accessible on the Review Commitment Control page.

Finalize

Select the **Finalize** tab.

Field or Control	Description
Finalized Amount	Displays the amount finalized and sent to Commitment Control (if Commitment Control is required) or to the Project Transaction table.
Finalize	Click to save the data and finalize the budget plan. This updates the Project Transaction Interface table and triggers the Load Third-Party Transactions Application Engine process to determine if the transactions must go through Commitment Control. The system: • Sends rows that require Commitment Control through the Project Costing to Commitment Control process. • Sends rows that do not require Commitment Control to the Project Transaction table. • Updates the Summary Budget Data table. To modify a budget plan: • If you do not use Commitment Control, add, modify, or delete budget detail rows and refinalize the plan. Alternatively, inactivate the current budget plan, and activate and finalize a new budget plan. • If you use Commitment Control, add new budget detail rows and refinalize the plan. You cannot modify finalized rows that have been sent to Commitment Control.

Budget Detail Page

Use the Budget Detail page (PC_BUD_DETAIL) to enter a high-level budget adjustment for the project and then distribute the budget adjustment down the WBS to costing activities.

Navigation:

- Click the **Budget Detail** icon on the Budget Plan page.
- **Project Costing**, and then **Budgeting**, and then **Budget Detail**, and then **Budget Detail**

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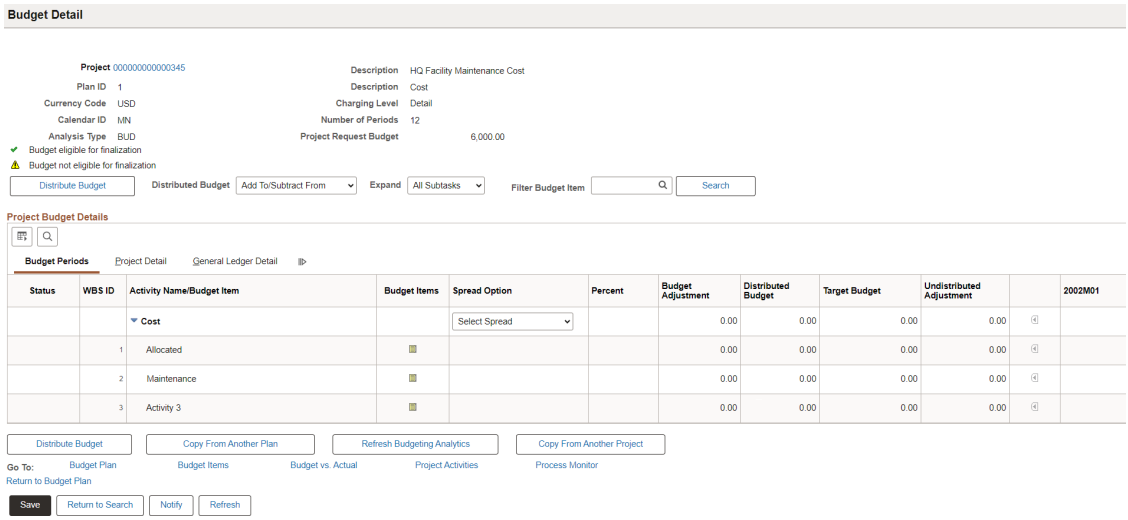
If all budget adjustments are distributed across budget items, use this page to distribute the budget adjustments evenly across budget periods.

> **Note**
>
> If the project was created using the Fluid Project Request, then the approved budgeted amount is shown at the top of the page as **Project Request Budget**.

This example illustrates the fields and controls on the Budget Detail page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Budget Detail page (2 of 2). You can find definitions for the fields and controls later on this page.

Field or Control	Description
Distribute Budget	Click to perform the action in the **Distributed Budget** field *(Add To/Subtract From* or *Replace)* to calculate the **Target Budget** field.

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Field or Control	Description
Distributed Budget	*Add To/Subtract From:* Select to add (if you enter a positive budget adjustment) or subtract (if you enter a negative budget adjustment) the budget adjustment amount to the distributed budget to calculate the target budget. This value is the default when you enter the page. *Add To/Subtract From* is the only valid option if Commitment Control is enabled for the business unit and the selected budget plan is already finalized, because you cannot modify existing budget rows. With Commitment Control, you can only add additional adjustment rows by using the Budget Items page. *Replace:* Select for the budget adjustment amount to replace the entire target budget amount when you click the **Distribute Budget** button. The distributed budget amount, which is the amount that has already been distributed down to the period level, changes to zero for all affected rows.
Expand	Select a specific WBS level for activities in that level to appear in the **Project Budget Details** grid. When you first enter the page, the WBS is expanded to the activity costing level and all budget item rows that are associated with activities are collapsed. Available options are: *All Subtasks:* Select for all activities and budget items associated with those activities to appear in the grid. *Level 1* through *Level 9:* Select for costing activities in a specific WBS level to appear in the grid. Click the **Expand** icon (the + symbol) or the **Collapse** icon (the − symbol) to collapse or expand individual rows.
Filter Budget Item	Select a budget item and click **Search** for only the selected budget item to appear in the grid. This field applies only when the WBS level is expanded to display budget items. The available budget items are based on the budget items that are associated with activities on the project. **Note:** If you use this option, activity totals can appear out of balance if they include budget items that do not appear in the grid.
Copy From Another Plan	Click to access the Copy From Another Plan page to copy budget items from a previous, saved version of a budget plan. You can copy from another plan only if this budget plan is not finalized.

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Field or Control	Description
Copy From Another Project	Click to access the Copy From Another Project page to copy budget items from the budget plan of another project. You can copy from another project only if this budget plan is not finalized.
Budget Plan	Click to access the Budget Plan page.
Budget Items	Click the **Budget Items** link at the bottom of the page to access the Budget Items component (PC_BUD_ITEMS) in a new browser window to create new budget items.
Budget vs. Actual	Click to access the Budget vs. Actual page for the project.

Budget Periods

Select the Budget Periods tab.

Field or Control	Description
Status	Displays an icon on the project row and budget item rows that indicates if budget adjustments are fully distributed to the activity, budget item, and period level.
✔	Appears in the Status column of a budget item row if the budget adjustment for this budget item is fully distributed down to the period level. Appears in the Status column of a project row if all budget item amounts are distributed down to the period level and the budget plan is ready to be finalized. Budget items with a zero amount are not considered in the finalization process, but remain in the budget details.
⚠	Appears in the Status column of a budget item row if the budget adjustment for this budget item is not fully distributed down to the period level. Appears in the Status column of a project row if the budget plan amount is not greater than zero, or if all budget item amounts are not distributed down to the period level
Activity Name/Budget Item	The first row displays information about the total project, which represents WBS level 0. Summary activities (in a bold font) and detail activities (in a normal font) appear in subsequent rows based on the WBS.
Budget Items	Click the icon in the Budget Items column to access the Project Budget Items - Adjust Budget Items page to distribute an activity's budget adjustment amount to budget items and view additional attributes, such as ChartFields.

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Field or Control	Description
Spread Option	Select an option to spread the **Budget Adjustment** amount to activities. The appearance of the columns on this page is based on your selection. Available values are: *Adjust by Amount* *Adjust by Percentage* *Clear Values* *Even Spread* *Percentage Spread* These options are discussed in more detail later in this section. If the spread option at the child level is different than the spread option of the parent level, the parent level spread option takes precedence when you click the **Distribute Budget** option. For example, assume that you want to adjust a summary activity budget adjustment of 10,000 USD with a spread option of *Even Spread* and a detail activity budget adjustment of 5,000 USD with a spread option of *Adjust by Amount.* When you click **Distribute Budget,** the system evenly spreads the summary activity amount of 10,000 USD across activities that belong to the summary activity and ignores the detail activity spread option. When you choose a spread option at a WBS level that contains children, the system performs an *Even Spread* at the child level. For example, assume that you select an *Adjust by Amount* spread option at a summary activity level. When you click the **Distribute Budget** button to spread the amount, the system also evenly spreads the amount to the detail activities that belong to the summary activity.
Percent	Enter a percentage at the project or summary activity level for the system to use to distribute the budget adjustment amount. Alternatively, enter percentage adjustments to individual costing activities. This field is editable if you select the *Adjust by Percentage* spread option or percentage spread.
Budget Adjustment	Enter an amount or view the result of the budget adjustment distribution based on the spread option that you selected. This amount has not been distributed to periods.
Distributed Budget	Displays budget adjustments that have been distributed to periods. When a budget adjustment is distributed to periods, the **Distributed Budget** value is updated with that amount and the **Budget Adjustment** value changes to zero.
Target Budget	The sum of the budget adjustment and distributed budget.

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Field or Control	Description
Undistributed Adjustment	The amount of the budget that has not been distributed to periods.
Even Spread	Click to spread the amount in the Undistributed Adjustment column evenly across all budget periods and update the **Undistributed Adjustment** amount.
Other	Click to access the Project Budget Periods - Adjust Budget Periods page and distribute budget adjustments to the period level.
<**Budget Period**>	View the budget distribution amount for each budget period. The budget period columns are based on the calendar ID, start date, and number of periods specified for the budget plan. The system determines the number of periods to display based on the calendar periods per year. If the number of periods per year is less than or equal to 26 then the system displays the number of periods in the calendar year. If the number of periods per year is 52, the system displays 26 periods. For any other number of periods per year, the system displays 15 periods. Use the horizontal scroll buttons to view additional budget periods. The horizontal scroll buttons appear only when the number of periods exceed the space on the page.

General Ledger Detail

Select the General Ledger Detail tab to view the GL business unit and other GL-related ChartField values that you select on the Project Budget Items - Adjust Budget Items page.

Commitment Control Detail

Select the Commitment Control Detail tab to view the ledger group, ledger, budget entry type, parent budget entry type, entry event, and other Commitment Control-related options that you select on the Project Budget Items - Adjust Budget Items page.

Adjust by Amount Spread Option

Select the *Adjust by Amount* spread option on the Budget Detail page to enter adjustment amounts at the project or summary activity level and spread the adjustments to each child costing activity under that project or summary activity by amount. Alternatively you can directly adjust specific activities. Select the *Adjust by Amount* option on the parent row of the costing activities that you want to adjust, and the **Budget Adjustment** fields for the selected project or activity and its children become editable.

If you select the *Adjust by Amount* spread option at an activity level where budget items exist, and the amount entered at the activity level is different from the sum of the budget items, the sum of the budget items takes precedence. For example, assume that you enter an activity budget adjustment value of 30,000 USD, and the sum of the individual budget item budget adjustments for the activity is 50,000 USD. The amount of the budget items overrides the value of the parent when you click **Distribute Budget.**

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A warning appears if the sum of the budget adjustments that you enter at the child level do not match the budget adjustment amount at the parent level. You can either override the value at the parent level or return to the Budget Detail page and change a budget adjustment amount.

Adjust by Percentage Spread Option

Select the *Adjust by Percentage* spread option on the Budget Detail page to enter percentage adjustments at the project or summary activity level and spread the adjustments to each child costing activity under that project or summary activity by percentage. Alternatively you can directly adjust specific activities. Select this option on the parent row of the costing activities that you want to adjust. The **Percent** fields for the selected project or activity and its children become editable. *Adjust by Percentage* is not a valid option on rows with a distributed budget amount of zero.

Clear Values Spread Option

To clear the amounts in the Budget Adjustment column and leave the existing amounts in the Distributed Budget column:

1. Select a distributed budget option of *Add To/Subtract From* on the Budget Detail page.
2. Select a spread option of *Clear Values* on the Budget Detail page.
3. Click the **Distribute Budget** button.

To clear the amounts in the Budget Adjustment column and the Distributed Budget column, and change the value in the Target Budget column to zero:

1. Select a distributed budget option of *Replace.*
2. Select a spread option of *Clear Values.*
3. Click the **Distribute Budget** button.

   The system clears the values for the row in which you selected the *Clear Values* option, and all rows below it. For example, if you select the *Clear Values* option for a summary activity, the system clears the values for the summary activity and all of its detail activities.

The *Clear Values* option is valid if either of these scenarios exist:

- Commitment Control is enabled and the budget plan is not finalized.
- Projects Budgeting is enabled without Commitment Control for finalized or nonfinalized budgets.

Even Spread Option

Select the *Even Spread* spread option on the Budget Detail page to enter adjustments at the project or summary activity level and spread the adjustments evenly to each child costing activity under that project or summary activity.

Percentage Spread Option

Select the *Percentage Spread* spread option on the Budget Detail page to enter adjustments at the project or summary activity level and spread the adjustments based on the percentages entered for each child costing activity under that project or summary activity.

Project Budget Items - Adjust Budget Items Page

Use the Project Budget Items - Adjust Budget Items page (PC_BUD_ITM_DST_SEC) to distribute budget amounts to budget items for costing activities.

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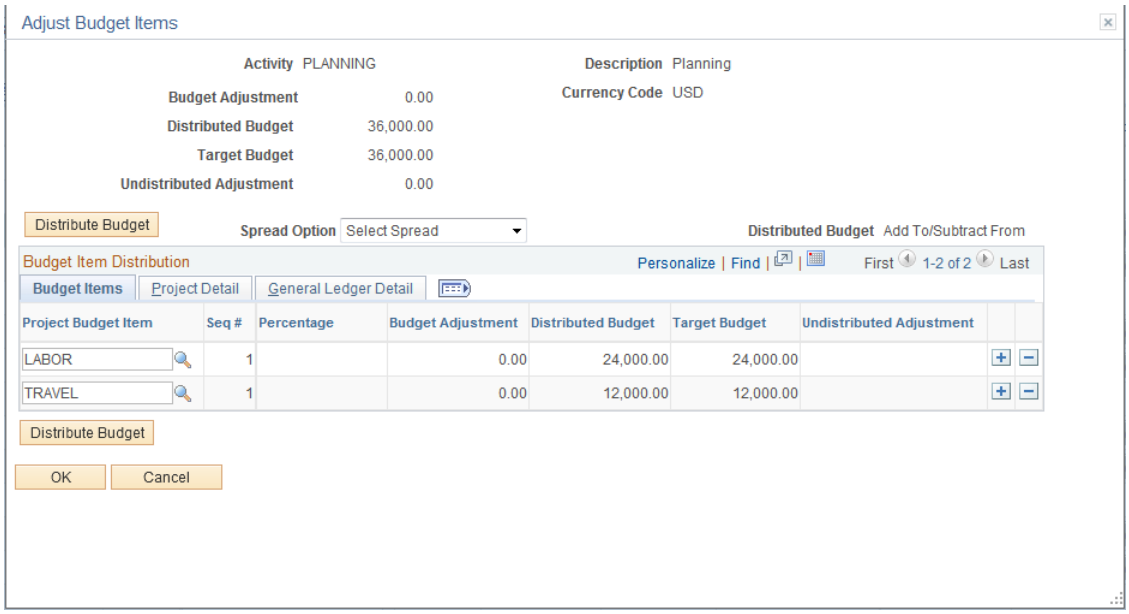
Navigation:

Click the **Budget Items** icon on the Budget Detail page.

This example illustrates the fields and controls on the Project Budget Items - Adjust Budget Items page. You can find definitions for the fields and controls later on this page.



If Commitment Control is enabled and the selected budget plan is already finalized, you can modify budget amounts only by inserting additional adjustment rows on this page.

The *Clear Values* spread option is the only method that you can use on this page to adjust budget amounts that have been distributed down to the period level.

Field or Control	Description
Spread Option	Select an option to spread the budget adjustment amount to budget items. The appearance of the columns on this page is based on your selection. Available values are: *Adjust by Amount* *Adjust by Percentage* *Clear Values* *Even Spread* *Percentage Spread* These options are discussed in more detail later in this section.
Distribute Budget	Click the **Distribute Budget** button to apply the selected spread option to calculate the budget adjustments. The system adds the budget adjustment and the distributed budget to arrive at the target budget.

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Field or Control	Description
OK	Click to return to the Budget Detail page and distribute the budget adjustments to periods. **Note:** When you return to the Budget Detail page, click **Save** to update the database with the changes that you made on the Budget Items page.
Cancel	Click to clear distributions from this page and return to the Budget Detail page.

Budget Items

Select the Budget Items tab to enter budget adjustments and view the distributed, total, and undistributed budgets for each budget item on the activity.

Field or Control	Description
Project Budget Item	Enter project budget items to which you want to distribute budget amounts for this activity.
Seq # (sequence number)	Displays the sequence number that increments by one each time that you enter a specific budget item for this activity.

Project Detail

Select the Project Detail tab to modify project-related ChartField values for source type, category, and subcategory.

General Ledger Detail

Select the General Ledger Detail tab to modify the GL business unit and other GL-related ChartField values. You can budget to a finer level of detail by entering ChartField values on the budget rows. This example shows the PLANNING activity with two labor budget items—one for department 153000 and one for department 154000:

This example illustrates the fields and controls on the Example of setting up specific ChartField values on the Project Budget Items - Adjust Budget Items page. You can find definitions for the fields and controls later on this page.

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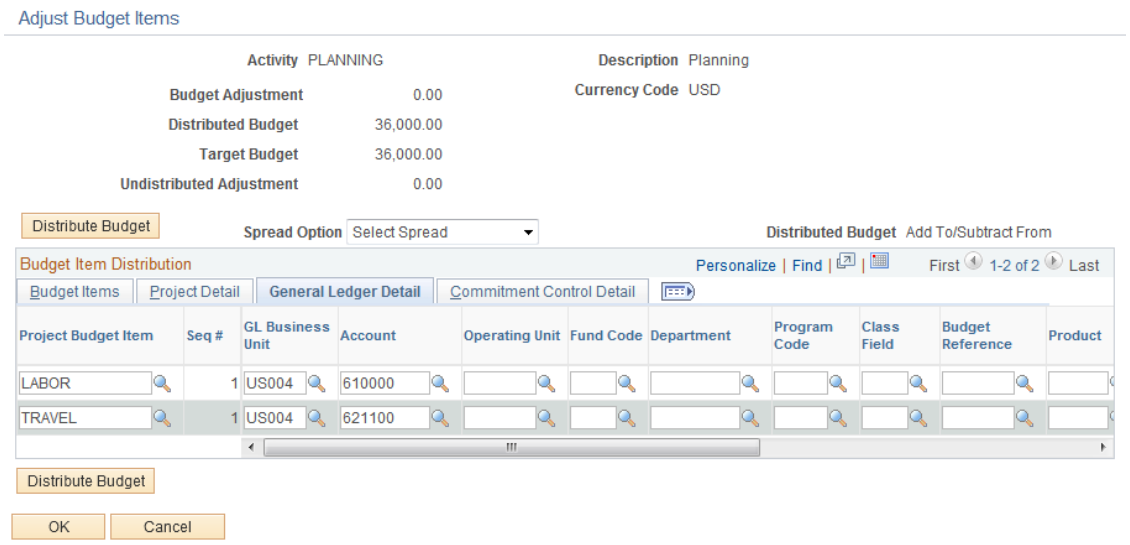

To budget down to the ChartField level:

1. On the Project Budget Items - Adjust Budget Items page, create as many budget item rows as needed for the activity.
2. On the General Ledger Detail tab of the Project Budget Items - Adjust Budget Items page, enter the specific ChartField combinations for each budget item.
3. Distribute each budget item separately.

> **Note**
>
> Multiple budget items do not roll up to a single budget item on the Budget Detail page.
>
> Combination editing is not available through project budget creation in Project Costing.

Commitment Control Detail

Select the Commitment Control Detail tab to modify the Commitment Control-related information.

Field or Control	Description
Ledger Group	Select a ledger group that is based on the GL business unit of the integration template that is associated with the project. You can override the GL business unit at the budget item level on the Commitment Control Detail tab. To select a ledger group for a budget item, the budget plan calendar ID must match the calendar ID of the Commitment Control budget definition that is associated with the specified ledger group. If no calendar is specified for the control budget definition, the system does not restrict you from specifying a ledger group based on the budget calendar.

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Field or Control	Description
Ledger	Select a detail ledger that belongs to the specified ledger group. The default value is based on the first ledger that is listed in the specified ledger group definition.
Budget Entry Type	Select the budget entry type of *Original* or *Adjustment.* The default value is *Original* if the plan has not been finalized. When the budget plan is successfully finalized, the system changes the budget entry type and parent budget entry type to *Adjustment,* but the value remains editable. If you create a project from a template and the template has a budget plan, the default value is a budget entry type of *Original* and a parent budget entry type of *Original.*
Generate Parent Budgets	Select for Commitment Control to automatically roll up budgets to create parent budgets. If the budget definition that is associated with the selected ledger group contains a value in the **Parent Control Budget** field, the **Generate Parent Budgets** field default value is enabled (checked), and is editable by the budget creator. If the budget definition that is associated with the selected ledger group does not contain a value in the **Parent Control Budget** field, the **Generate Parent Budgets** field is not available for selection on the Project Budget Items - Adjust Budget Items page because the system assumes that the budget definition that is associated with the ledger group is a parent budget.

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Field or Control	Description
Parent Budget Entry Type	Select a parent budget entry type if you select **Generate Parent Budgets.** If the budget definition that is associated with the specified ledger group contains a value in the **Parent Control Budget** field, the **Parent Budget Entry Type** field is editable. If the budget definition that is associated with the specified ledger group does not contain a value in the **Parent Control Budget** field, the **Parent Budget Entry Type** field is not available because the system assumes that the budget definition that is associated with the ledger group is a parent budget. The default value is *Original* if the budget plan has not been finalized. When the budget plan is successfully finalized, the system changes the **Budget Entry Type** and **Parent Budget Entry Type** to *Adjustment,* but the field remains editable. The **Parent Budget Entry** field is not available for selection if the **Generate Parent Budget** option is not enabled. If you create a project from a template and the template has a budget plan, the default value is a budget entry type of *Original* and a parent budget entry type of *Original.*
Use Default Event Entry	Select this option to use the entry event default value that is specified on the Control ChartField page in Commitment Control budget definition as the entry event code for the parent budget. This option is applicable if you select the **Generate Parent Budgets** option to automatically create the parent budget when you create a child budget. **Note:** If entry events are required for the Commitment Control ledger group for the parent budget, the system uses the default entry event code on the parent budget regardless of the **Use Default Entry Event** option on this page. This option not available for selection if you specified **No EE** (no entry event) for General Ledger on the Installation Options - Entry Event page.

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Field or Control	Description
Entry Event	Enter an active entry event code that is applicable for the budget row. After the budget plan is saved and finalized, the Entry Event Generator Application Engine process (FS_EVENTGEN) can create additional accounting entries. You must enter an entry event code on a budget detail row for a ledger group if you specified entry events as required for the Commitment Control ledger group on the Ledgers For A Unit - Commitment Control Options page. This validation occurs during the Project Costing to Commitment Control integration process. You must also must enter an entry event code if you specified entry events as required for PeopleSoft General Ledger on the Installation Options - Entry Event page. This validation occurs online when you enter budget details. Regardless of whether you specify entry events as required or optional for the ledger group, the Project Costing Budget Entry Event Processor (PC_TO_EE) will generate entry event journal entries for both the child and parent budget if you specify an entry event code on the budget detail row. If you select an inactive entry event code and try to finalize the budget, the system will not proceed with the finalization process. A message appears on the Review Commitment Control page in the Error column for the corresponding budget detail row indicating that the row contains an invalid value. You must change the event entry code and refinalize the budget plan. This field not available for selection if you specified **No EE** (no entry event) for General Ledger on the Installation Options - Entry Event page.
Set Options	Click to access a page where you can view the business unit and ledger group for the budget, and modify budget status, and budget control options. **Note:** This button is only enabled when the ledger group is a Commitment Control type ledger group.

See Working with Entry Events.

Adjust by Amount Spread Option

Select the *Adjust by Amount* spread option on the Project Budget Items - Adjust Budget Items page to spread the budget adjustment for a costing activity to budget items manually by entering the desired amounts. You can also adjust specific budget items directly. The fields in the **Budget Adjustment** column become editable.

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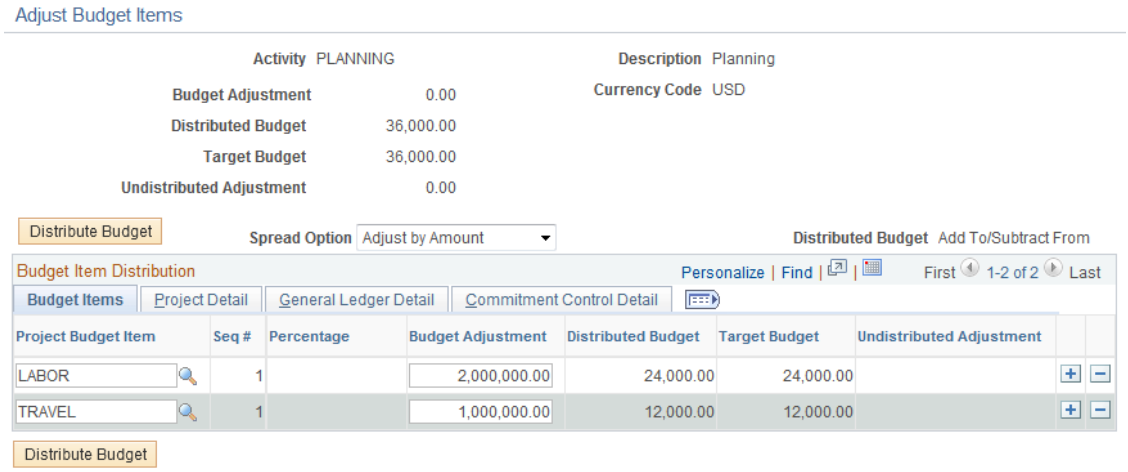
A warning appears if the sum of the budget adjustments that you enter for the budget items do not match the budget adjustment amount for the costing activity. You can either override the value at the activity level or return to the Project Budget Items - Adjust Budget Items page and modify a budget adjustment amount.

In this example, the budget adjustment of 3,000,000 USD for the PLANNING activity is spread by the amount of 2,000,000 USD to the LABOR budget item and 1,000,000 USD to the TRAVEL budget item:

This example illustrates the fields and controls on the Example of adjusting by amount on the Project Budget Items - Adjust Budget Items page. You can find definitions for the fields and controls later on this page.



After you click the **Distribute Budget** button, the system:

- Replaces the previous value in the **Budget Adjustment** field with the new adjusted amount.
- Updates the **Undistributed Adjustment** field in the page header.
- Updates the Target Budget column in the **Budget Item Distribution** grid.
- Changes the Budget Adjustment column to read-only.
- Changes the **Spread Option** value to *Select Spread.*

Adjust by Percentage Spread Option

Select the *Adjust by Percentage* spread option on the Project Budget Items - Adjust Budget Items page to adjust particular budget items by percentage. The fields in the Percentage column become editable.

The system calculates the budget adjustment for each budget item as the (distributed budget) × (percentage).

A value in the Distributed Budget column for a budget item indicates that the amount is distributed down to the period level. If an activity has budget items with both distributed budget amounts and budget adjustment amounts, the system ignores the budget adjustments.

In this example, assume that the PLANNING activity has a 1,000 USD budget adjustment and a 36,000 USD distributed budget:

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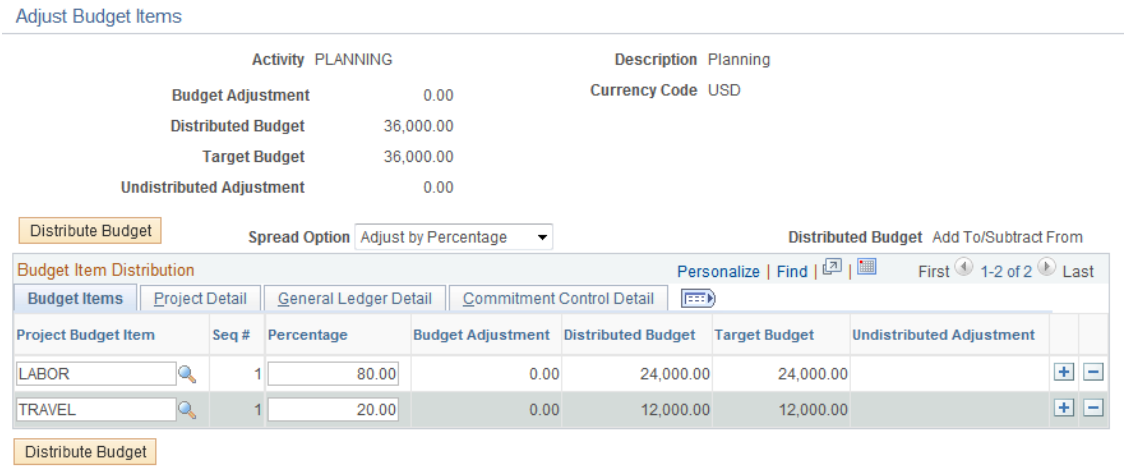
This example illustrates the fields and controls on the Example of adjusting by percentage on the Project Budget Items - Adjust Budget Items page. You can find definitions for the fields and controls later on this page.



The system disregards the existing budget adjustment amount when performing an adjustment by percentage on this page. In this example, the system calculates a new budget adjustment amount for the LABOR budget item of (10 percent) × (24,000 USD) = (2,400 USD), and a new TRAVEL budget adjustment of (15 percent) × (12,000 USD) = (1,800 USD).

> **Note**
>
> You cannot copy budget item distribution percentages from one activity to another, or from one budget item to another.

Even Spread Option

Select the *Even Spread* spread option on the Project Budget Items - Adjust Budget Items page to spread the budget adjustment evenly across the budget items for the selected costing activity.

The calculations that the system uses to determine the budget adjustment for each item are based on the budget adjustment amount on the Budget Detail page. For example, assume that three budget items exist for a costing activity with a total budget adjustment amount of 24,000 USD. At the budget item level, the adjustment amounts are 8,000 USD for one budget item, zero adjustment amount for the second budget item, and 16,000 USD for the third budget item. The system divides the 24,000 USD evenly between the three activities, for a result of 8,000 USD each.

If you enter the Project Budget Items - Adjust Budget Items page with a zero value in the **Budget Adjustment** field for the activity, and select a spread option of *Even Spread,* the **Budget Adjustment** field in the page header becomes editable for you to enter a budget adjustment value at the activity level. The **Budget Adjustment** field changes to read-only when you click **Distribute Budget.**

Percentage Spread Option

Select the *Percentage Spread* spread option on the Project Budget Items - Adjust Budget Items page to spread the budget adjustment amount for the activity to budget items based on

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the percentages that you enter. The sum of the percentages must equal 100 percent. When you select this option the fields in the Percentage column become editable.

Similar to the *Even Spread* option, the calculations that the system uses to determine the budget adjustment for each item are based on the budget adjustment amount on the Budget Detail page. For example, assume that two budget items exist for a costing activity with a total budget adjustment amount of 24,000 USD. At the budget item level, the adjustment percentages are 30 percent for one budget item and 70 percent for the second budget item. The system multiplies the 24,000 USD by 30 percent and 70 percent to arrive at the budget distribution amount.

If you enter the Project Budget Items - Adjust Budget Items page with a zero value in the **Budget Adjustment** field for the activity, and select a spread option of *Percentage Spread,* the **Budget Adjustment** field becomes editable for you to enter a budget adjustment value at the activity level. The field changes to read-only when you click **Distribute Budget.**

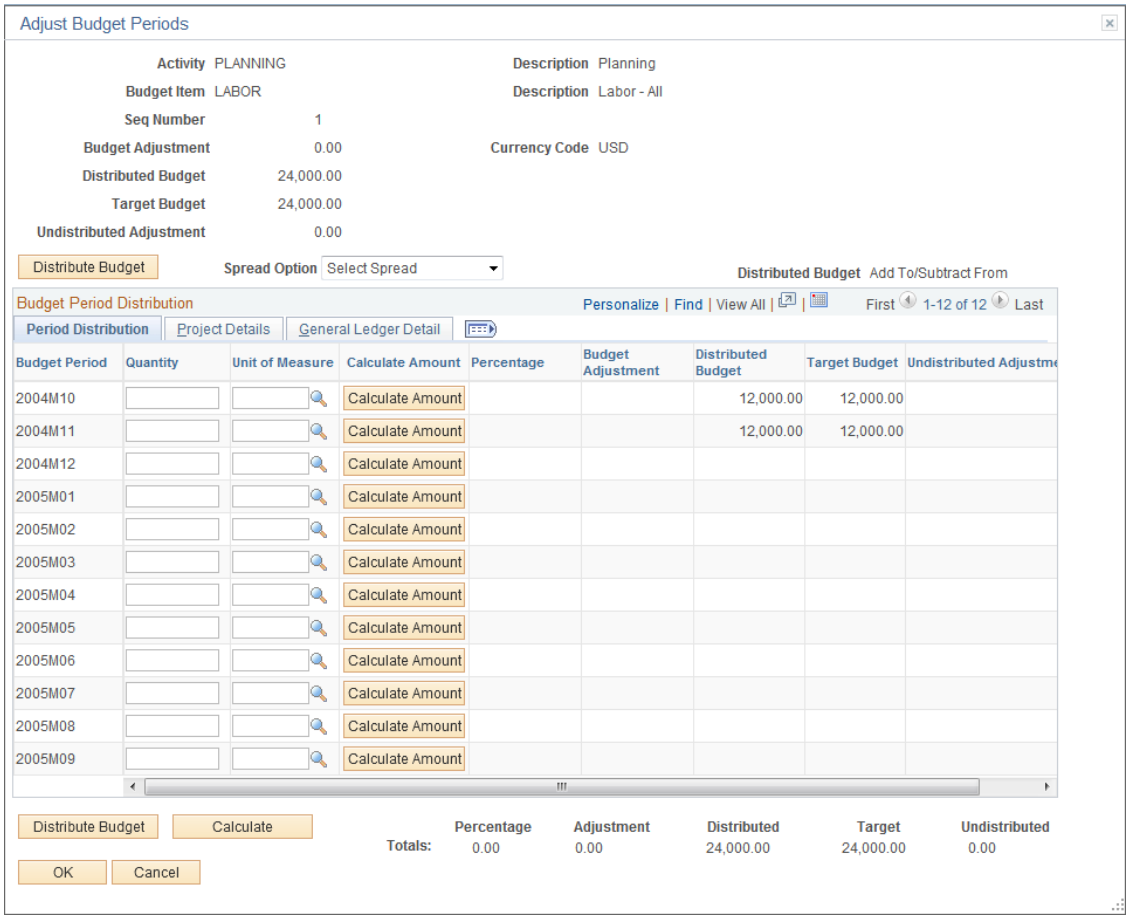
Project Budget Periods - Adjust Budget Periods Page

Use the Project Budget Periods - Adjust Budget Periods page (PC_BUD_PER_DST_SEC) to distribute budget amounts to budget periods for costing activities and budget items.

Navigation:

Click the **Other** link on the Budget Detail page.

This example illustrates the fields and controls on the Project Budget Periods - Adjust Budget Periods page. You can find definitions for the fields and controls later on this page.



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This page contains additional spread methods that you can use to adjust budgets to the period level. Budget amounts that you distribute on this page roll up to the budget item, activity, and project level.

Field or Control	Description
Spread Option	Select an option to spread the budget adjustment amount to periods. You must select a spread option before you can take action on this page. If you change the spread option, the system clears any existing amounts in the **Budget Adjustment** field.
Budget Period	Lists the budget periods in the budget plan.
Quantity	Enter a quantity that the system uses to calculate budget adjustments by period for labor resources based on a quantity x rate calculation.
Unit of Measure	Enter the unit of measure that the system uses with the quantity to calculate budget adjustments by period for labor. The unit of measure must have conversion data defined from the unit of measure on the Budget Periods page to the unit of measure that appears on the Calculate Amount From Quantity page. See Application Fundamentals: Units of Measure Page.
Calculate Amount	Click to access the Calculate Amount From Quantity page to select a rate calculation basis of *Employee ID, Job Code,* or *Project Role.* This button appears only if the budget item resource class is *Labor* or blank.

Calculate Amount From Quantity Page

Use the Calculate Amount From Quantity page (PC_BUD_CALC_RT_SEC) to select a rate by employee ID, project role, or job code to use to calculate a budget row amount.

Navigation:

Click the **Calculate Amount** button on the Project Budget Periods - Adjust Budget Periods page.

The Calculate Amount From Quantity page appears when you select the **Adjust by Amount** spread option on the Project Budget Periods - Adjust Budget Periods page, enter the quantity and unit of measure, and click the **Calculate Amount** button.

This example illustrates the fields and controls on the Calculate Amount From Quantity page. You can find definitions for the fields and controls later on this page.

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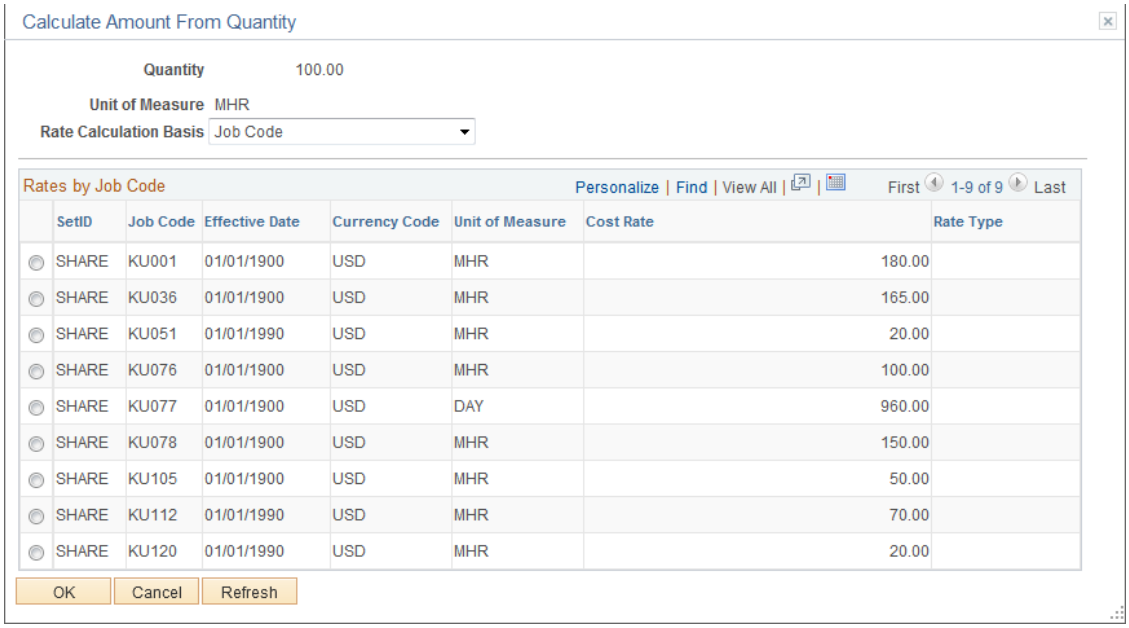

Field or Control	Description
Rate Calculation Basis	Select one of these options: *Employee ID:* Select for a list of employee cost data to appear in the **Rates by Employee ID** grid. *Job Code:* Select for a list of job code cost data to appear in the **Rates by Job Code** grid. *Project Role:* Select for a list of project role cost data to appear in the **Rates by Project Role** grid. After you select the rate calculation basis, the list of detailed rate rows appears in the grid. Select the row that contains the desired rate for the system to use to calculate budget adjustments by period for labor.
Rate Type	This field appears only for rates that require multicurrency conversion. If the rate that you select on the Calculate Amount From Quantity page uses a different currency code than the budget plan currency code, enter the rate type that the system uses to convert the rate to the budget plan currency code.
OK	Click to return to the Project Budget Periods - Adjust Budget Periods page. Any amount that exists in the **Distributed Budget** field for the period will be overridden with the new calculated amount.

Adjust by Amount Spread Option

Select *Adjust by Amount* in the **Spread Option** field on the Project Budget Periods - Adjust Budget Periods page to spread the budget adjustment for the budget item to periods manually by entering the desired amounts, or adjust a particular periods directly. Fields in the Budget Adjustment column become editable.

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To use the *Adjust by Amount* option, the undistributed adjustment amount that appears in the **Budget Periods** grid on the Budget Detail page must equal zero. You can change the undistributed adjustment amount in the **Budget Periods** grid to zero and only distribute the budget adjustments by the amount that appears in the **Period Distribution** grid on the Project Budget Periods - Adjust Budget Periods page. Alternatively, you can evenly spread the undistributed adjustment amount across budget periods and also distribute the budget adjustments by the amount that appears in the **Period Distribution** grid.

The budget amount calculation is based on the selected distributed budget option:

- *Add To/Subtract From:* Direct entry of budget adjustment amounts against a specific budget period. Upon distributing these budget adjustments, this amount is added to or subtracted from any existing distributed budget adjustment for that specific period.
- *Replace:* Direct entry of budget adjustment amounts against a specific budget period. Upon distributing these budget adjustments, this amount replaces any existing distributed budget adjustment for that specific period.

Adjust by Percentage Spread Option

Select the *Adjust by Percentage* option on the Project Budget Periods - Adjust Budget Periods page to adjust particular budget periods by percentage directly. The fields in the **Percentage** column become editable.

The budget amount calculation is based on the selected distributed budget option:

- *Add To/Subtract From:* (Budget adjustment of period) × (Percentage entered for budget period) = (Distributed budget at period level).

> **Note**
>
> Any existing distributed budget amounts are added to this calculation.

- *Replace:* (Budget adjustment of period) × (Percentage entered for budget period) = (Distributed budget at period level).

> **Note**
>
> Any existing distributed budget amounts are overridden with this calculation.

Even Spread Option

Select the *Even Spread* option on the Project Budget Periods - Adjust Budget Periods page to spread the budget adjustment evenly across the budget periods for the selected costing activity and budget item.

The budget amount calculation is based on the selected distributed budget option:

- *Add To/Subtract From:* (Budget adjustment at item level) ÷ (Number of periods) = (Distributed budget at period level).

> **Note**
>
> Any existing distributed budget amounts are added to this calculation.

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- *Replace:* (Budget adjustment at item level) ÷ (Number of periods) = (Distributed budget at period level).

> **Note**
>
> Any existing distributed budget amounts are overridden with this calculation.

Percentage Spread Option

Select the *Percentage Spread* option on the Project Budget Periods - Adjust Budget Periods page to spread the budget adjustment amount for the activity to budget items based on the percentages that you enter. When you select this option the fields in the Percentage column become editable.

The budget amount calculation is based on the selected distributed budget option:

- *Add To/Subtract From:* (Budget adjustment at item level) × (Percentage entered for each budget period) = (Distributed budget at period level).

> **Note**
>
> Any existing distributed budget amounts are added to this calculation.

- *Replace:* (Budget adjustment at item level) × (Percentage entered for each budget period) = (Distributed budget at period level).

> **Note**
>
> Any existing distributed budget amounts are overridden with this calculation.

Copy From Another Plan Page

Use the Copy From Another Plan page (PC_BUD_COPY) to copy budget amounts from another plan, or copy previous versions of a budget plan to the current one.

Navigation:

Click **Copy From Another Plan** on the Budget Detail page if the budget plan is not finalized.

To copy budget items from another plan:

1. Save the existing plan before you copy budget rows from another plan.
2. Select a budget plan to copy other than the current plan.

   If you want to copy budget amounts, then the currency, calender, and the budget periods of the plan that you are copying must be the same as the current plan. If you copy budget amounts from a plan that has a different period, or a different currency code, then you must manually add budget period values that don't match the current plan.
3. (Optional) Select an activity to copy budget item amounts by period from a specific activity on the selected plan to the current plan.

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Leave the **Activity** field blank to copy all activity budget item amounts by period from the selected plan to the current plan.

4. Select **Overwrite existing values** to delete existing budget rows in the current plan before copying new budget amounts into the plan.

   Deselect this option to append existing budget rows with new budget amounts.

   For example, if you copy plan ID 1 and activity row 1 to plan ID 2, and you select the **Overwrite existing values** option, the system replaces activity row 1 in plan ID 2 with row 1 in plan ID 1.

When you copy budget rows from another plan, the system populates the existing plan with the accounting date of the copied plan, and the transaction date of the current date, and generates a new resource ID.

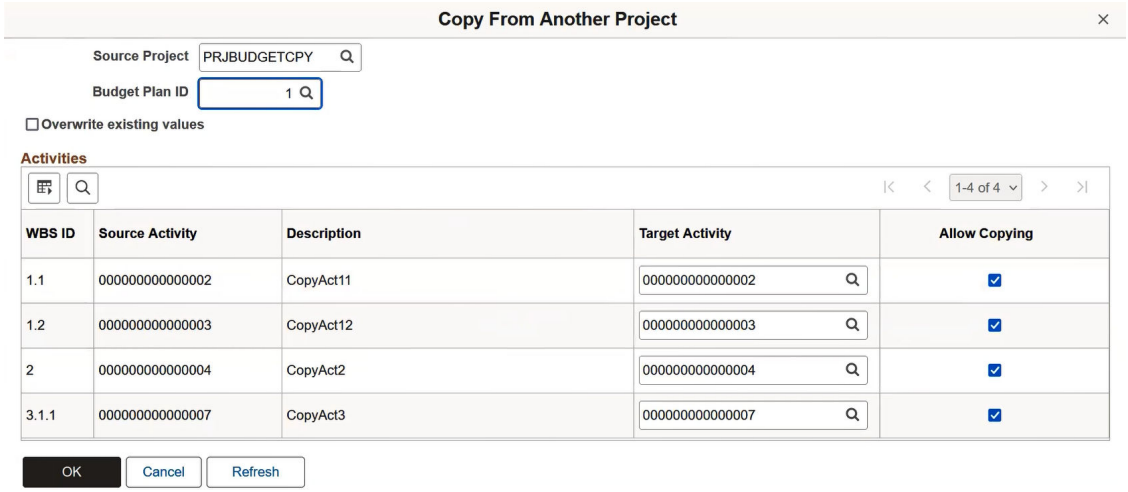
Copy From Another Project Page

Use the Copy From Another Project page (PC_BUDGET_COPY_SEC) to copy budget items from the budget plan of another project to the current one.

Navigation:

Click **Copy From Another Project** on the Budget Detail page if the budget plan is not finalized.

This example illustrates the fields and controls on the Copy From Another Project page



To copy budget items from the budget plan of another project:

1. Save the existing plan before you copy budget items from the budget plan of another project.
2. Select a source project to copy from.

> **Note**
>
> If the project was created using copy functionality in the Fluid Project Request, then the source project will default to the source project used to create the project request, and changes can be made.

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3. Select a budget plan from the source project.
4. Select **Overwrite existing values** to delete existing budget rows in the current plan before copying new budget items into the plan.

   Deselect this option to append new budget items to the existing budget items in the project.
5. The activities grid is populated with source activities on selection of budget plan id for the source project.

   If the target activity matches the source activity then it will be populated and the Allow Copying field is checked by default.

If Target Activity is not auto-populated then select an unused activity in the prompt. A target activity must be selected to perform the copy. De-select the **Allow Copying** Check-box to prevent the source activity's budget from being copied.

Finalizing Budgets

Access the Budget Plan page.

Click the **Finalize** button on the Finalize tab of the Budget Plan page to finalize a project budget plan. Only active budget plans can be finalized. All other plans of the same type (cost or revenue) for the same project must be inactive. Only one budget plan of each type can be finalized per project. You can adjust budget plans and refinalize the budget.

Related Topics

- Understanding Integration Between PeopleSoft Project Costing and PeopleSoft Commitment Control
  Commitment Control is an optional feature of Oracle's PeopleSoft Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management product lines. It enables you to control expenditures against predefined, authorized cost, or revenue budgets.
- Setting Up PeopleSoft Project Costing for PeopleSoft Commitment Control
- Budget Checking Transactions in Commitment Control
- Sending Commitment Control Transactions to PeopleSoft Project Costing
  This topic discusses how to run the Commitment Control to Project Costing process.
- Working with Entry Events
- PeopleSoft Project Costing Reports: A to Z
  This topic provides a table that lists the PeopleSoft Project Costing reports, sorted alpha-numerically by report ID.

Maintaining Budget Plan Versions

Pages Used to Maintain Budget Plan Versions

Page Name	Definition Name	Usage
Budget Plan Page	PC_BUD_GENERAL	Create new budget plan versions by finalizing a cost or revenue budget plan.

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Page Name	Definition Name	Usage
Transaction List Page	PROJECT_EXPRESSG	View historical budget detail rows that are associated with budget version analysis groups.

Budget Plan Page

Use the Budget Plan page (PC_BUD_GENERAL) to create new budget plan versions by finalizing a cost or revenue budget plan.

Navigation:

Project Costing, and then **Budgeting**, and then **Budget Plan**, and then **Budget Plan**

> **Note**
>
> Before you can create budget plan versions, you must enable budget row versioning for the business unit and define the sequence of analysis types that the system uses to distinguish historical cost and revenue budget versions.

Click the **Finalize** button on the Finalize tab for an active cost budget or revenue budget. The system:

- Verifies that an analysis type, that was not previously assigned to a version, remains in the budget analysis type sequence on the Budget Row Versioning page.

  When budget row versioning is enabled, the first time that you finalize a project budget for the business unit, the system assigns the first analysis type from the cost or revenue budget analysis type sequence on the Budget Row Versioning page to a copy of the budget plan rows. Each subsequent time that you finalize a project budget, the system updates a copy of the new finalized budget rows with the next available analysis type from the sequence.
- Makes a copy of the current, finalized budget detail rows and updates the analysis type with the next available value in the budget analysis type sequence.
- Assigns new, unique values to the **Transaction ID** field (RESOURCE_ID) of the copied rows, and stores the resource ID from the original rows in the **Original Transaction ID** field (RESOURCE_ID_FROM) of the copied rows.
- Stores the copy of the budget detail rows, with the new analysis type, in the Project Transaction table.
- Saves the current, finalized budget, with the original analysis type, in the Project Transaction table.

  The current, finalized budget rows are identical to the latest historical budget version in the Project Transaction table, except for the analysis type. The analysis type on the historical rows is based on the latest available analysis type from the Budget Row Versioning page.

If budget row versioning is enabled but all of the analysis types in the budget analysis type sequence have been assigned, a warning message appears when you click **Finalize** that prompts you to either abort the finalization process or proceed. If you abort the process, you can return to the Budget Row Versioning page and append the analysis type sequence. If you proceed with the finalization process without appending the analysis type sequence, the

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system does not retain a historical copy of the finalized budget rows in the Project Transaction table. However, all previously created historical rows remain in the Project Transaction table.

Related Topics

- Budget Row Versioning Page
  Use the Budget Row Versioning page (PC_BUD_VER_HST_CFG) to enable budget row versioning for the business unit, and define the sequence of analysis types that the system uses to distinguish historical cost and revenue budget plan versions.

Processing Budget Rows From Microsoft Project

Page Used to Process Budget Rows From Microsoft Project

Page Name	Definition Name	Usage
Budget Plan - Finalize Page	PC_BUD_GENERAL	Creating budget rows by using data created in Microsoft Project. Click the **Finalize** button to send a Project Costing budget to the Project Transaction table or to Commitment Control if the appropriate options are selected.

Budget Plan - Finalize Page

Use the Budget Plan - Finalize page (PC_BUD_GENERAL) to creating budget rows by using data created in Microsoft Project.

Click the Finalize button to send a Project Costing budget to the Project Transaction table or to Commitment Control if the appropriate options are selected.

Navigation:

Project Costing, and then **Budgeting**, and then **Budget Plan**

Click the Finalize tab.

Use this method for budget rows created in Microsoft Project.

To create a budget using Microsoft Project:

1. Stage Microsoft budget data in the Project Transaction Interface table by using the appropriate integration process.
2. Run the Load Third-Party Transactions process from the Load Transactions page to load data from the Project Transaction Interface table to the Project Transaction table.

See Also, *PeopleTools: PeopleSoft Process Scheduler*

Related Topics

- Understanding Project Cost and Revenue Budgets
  This topic discusses:
- Reviewing and Modifying Interface Table Data
- PeopleSoft Commitment Control: Understanding Exception Handling and Notification

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- Understanding Integration of PeopleSoft Project Costing with Microsoft Project
  This topic lists prerequisites and discusses:
- Setting Up Integration Options

Integrating Budget Data with Planning and Budgeting

PeopleSoft Project Costing integrates with PeopleSoft Planning and Budgeting for Enterprise Performance Management (EPM), which is an application specifically designed for preparing budgets and providing the sophisticated processing necessary to perform the budgeting calculations and forecasting required to produce a truly viable budget.

Pages Used to Integrate Budget Data with PeopleSoft Planning and Budgeting

Page Name	Definition Name	Usage
Send to Budgeting Page	PC_TO_BD	Send project information to PeopleSoft Planning and Budgeting to update budgeting data and to aid in forecasting future budgets by using the Project Costing to Budgeting Application Engine process (PC_PC_BD_B).
Retrieve from Budgeting Page	PC_BD_TO_PC	Import budgets prepared in PeopleSoft Planning and Budgeting into PeopleSoft Project Costing using the Budgeting to Project Costing Application Engine process (PC_BD_TO_PC).
Transaction List Page	PROJECT_EXPRESSG	View budget transactions in Project Costing.

See also, *PeopleSoft EPM Planning and Budgeting*, “Integrating with Other Applications”, Using Data from PeopleSoft Project Costing, Processing Project Costing Data

Send to Budgeting Page

Use the Send to Budgeting page (PC_TO_BD) to send project transaction information to PeopleSoft Planning and Budgeting to update budgeting data and to aid in forecasting future budgets by using the Project Costing to Budgeting Application Engine process (PC_PC_BD_B).

Navigation:

Project Costing, and then **Budgeting**, and then **Send PC Budgets to Budgeting**

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

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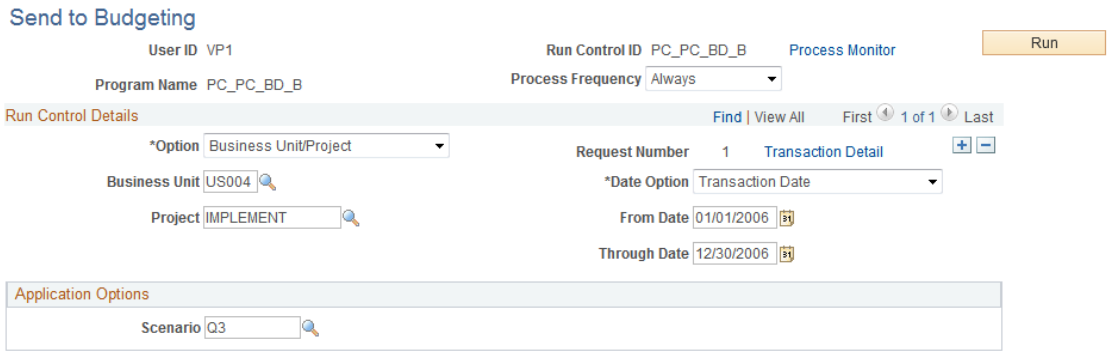

Field or Control	Description
Option	Select an option to send all or specific transactions to PeopleSoft Planning and Budgeting.
Scenario	Select a scenario, which is a PeopleSoft ChartField used to identify different assumptions or types of budget information.

After the historical data is in the Project Based Ledger table (LEDGER_PROJ) and is copied to the PeopleSoft Warehouse, PeopleSoft EPM Planning and Budgeting users can use it to build a budgeting model and prepare budget data. When the budget is complete, a PeopleSoft Planning and Budgeting user moves the data back into the Project Based Ledger table by using the Import Budgeting Data page.

After a budget is sent back to the Project Based Ledger table, it is ready for transfer to Project Costing.

Related Topics

- Application Fundamentals: Entering and Maintaining ChartField Values
- PeopleSoft General Ledger: Importing Data from EPM Budgeting

Retrieve from Budgeting Page

Use the Retrieve from Budgeting page (PC_BD_TO_PC) to import budgets prepared in PeopleSoft Planning and Budgeting into PeopleSoft Project Costing using the Budgeting to Project Costing Application Engine process (PC_BD_TO_PC).

Navigation:

Project Costing, and then **Budgeting**, and then **Retrieve From Budgeting**, and then **Retrieve From Budgeting**

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

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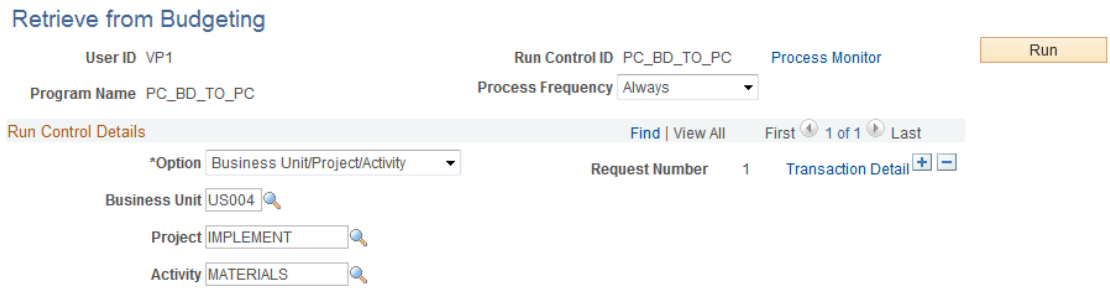

After a budget is generated in PeopleSoft Planning and Budgeting, and the budget information is placed in the Project Based Ledger table, you can import it into the Project Transaction table using the Retrieve from Budgeting Application Engine process (PC_BD_TO_PC). The Retrieve from Budgeting process copies the information from the Project Based Ledger table to the Project Transaction table.

If you plan to create multiple budget scenarios for your projects in PeopleSoft Planning and Budgeting, you should create multiple budget analysis types in Project Costing and adjust the Retrieve from Budgeting process so that individual scenarios are mapped to different analysis types. This action is necessary if you want to track multiple scenarios in Project Costing. If your Application Engine process maps all scenarios to the same analysis type, then each subsequent scenario will add additional resource transactions of the same analysis type.

If a budget row does not contain an analysis type from the Project Based Ledger table, the integration process assigns the first analysis type from the analysis group that is specified on the Project Costing Definition page for the project.

> **Note**
>
> This PeopleSoft application delivers sample data that contains analysis types *BD1* (Total Cost Budget - Scenario 1) through *BD9* (Total Cost Budget - Scenario 1) to facilitate multiple budget scenarios.

See also, *PeopleSoft EPM Planning and Budgeting*, “Integrating with Other Applications”, Using Data from PeopleSoft Project Costing, Processing Project Costing Data

Transaction List Page

Use the Transaction List page (PROJECT_EXPRESSG) to view budget transactions in Project Costing.

Navigation:

Project Costing, and then **Transaction Definitions**, and then **Transaction List**, and then **Transaction List**

You can create a special analysis group that retrieves only transactions with budget-related analysis types.

Related Topics

- Transaction List Page
  Use the Transaction List page (PROJECT_EXPRESSG) to view transactions that belong to a project activity.

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- Analysis Groups Page
  Use the Analysis Groups page (PROJ_AN_GRP_MAP) to create and modify analysis groups.

Analyzing Budgets

This topic discusses how to compare budget amounts to actual costs and revenues.

Pages Used to Analyze Budgets

Page Name	Definition Name	Usage
Budget vs Actual Page	PC_BUD_SUM	Compare costs to budgeted amounts for cost budgets. Compare actual revenue to projected revenue for revenue budgets.
Refresh Budget Summary Tables Page	PC_BUD_SUM_RFSH	Run the Refresh Budget Summary Application Engine process (PC_BUD_SUM) to refresh the Budget Summary tables that are used for reporting purposes. You can schedule this process to run periodically, or you can run it as needed before creating reports, such as the Budgets vs. Actual report. This page can be accessed by selecting**Project Costing**, and then **Utilities**.
Budget Item Page	PC_BUD_ITM_SUM	View budget amount versus actual cost by budget item. Click the **Detail** icon to view information at the summary activity level. This page can be accessed by selecting **Project Costing**, and then **Interactive Reports**.

Budget vs Actual Page

Use the Budget vs. Actual page (PC_BUD_SUM) to compare costs to budgeted amounts for cost budgets.

Compare actual revenue to projected revenue for revenue budgets.

Navigation:

- **Project Costing**, and then **Budgeting**, and then **Budget Plan**, and then **Budget Plan**. Click the **Budget vs Actual** icon on the Budget Plan page.
- **Project Costing**, and then **Budgeting**, and then **Budget Detail**, and then **Budget Detail**. Click the **Budget vs. Actual** link on the Budget Detail page.
- **Project Costing**, and then **Interactive Reports**, and then **Budget vs Actual Report**

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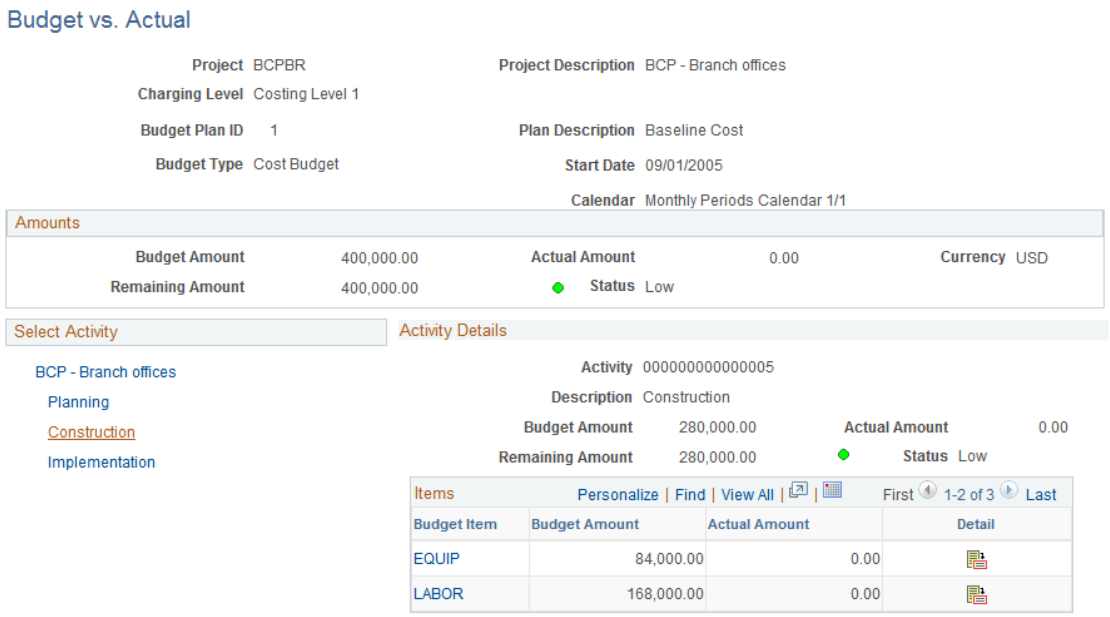
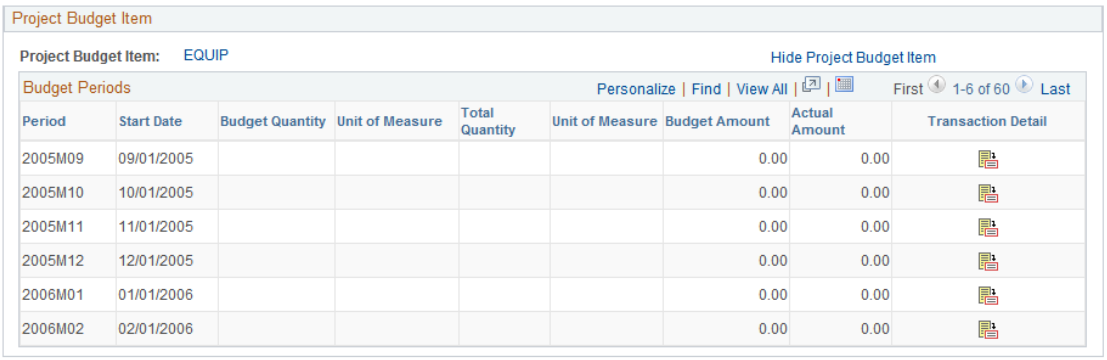
This example illustrates the fields and controls on the Budget vs. Actual page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Budget vs. Actual page (2 of 2). You can find definitions for the fields and controls later on this page.



The currency code for the Budget vs. Actual report is based on the currency code of the project business unit.

Field or Control	Description
Select Activity	Displays the WBS of the project. Select an activity node for the activity details to appear in the **Activity Details** group box.

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Field or Control	Description
Budget Item	Click to access the Budget Items component in a new browser window to view or create new budget items. Actual costs or revenue that are posted to Project Costing against an unbudgeted ChartField combination appear with a *(NON-ALLOCATED)* budget item. Click the *(NON-ALLOCATED)* link to access the Transaction List for the specific project and activity. **Note:** To determine the ChartField information for a specific budget item, the Budget vs. Actual report uses the budget item setup information in the Budget Items component. The Budget vs. Actual report does not reflect changes that occur to ChartField information on the Project Budget Items - Adjust Budget Items page. See Budget Items Page.
	Click the **Detail** icon for the **Project Budget Item** group box to appear at the bottom of the page for the specific budget item.

Project Budget Item

Use the **Project Budget Item** group box to view budgeted amounts for the selected activity node by budget item and budget period. Every budget period has a budget row even if a budget amount does not exist for the period. The number of rows that the system inserts is based on the start and end dates of the project.

Field or Control	Description
	Click the **Transaction Detail** icon to access the Transaction List for the specific project and activity.

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Analyzing Project Analytics Using PeopleSoft Insights

Understanding PeopleSoft Insights for Projects

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

Dashboard administrators use PeopleSoft Insights and the underlying analytics engine to create both dashboards and visualizations, which are then attached to dashboards. The dashboard can contain multiple visualizations. The visualization and dashboard are objects in PeopleSoft Insights, which must be imported into the PeopleSoft application.

Typically, a PeopleSoft user who has the Search Administrator role performs these tasks:

- Deploys dashboards.
- Configures dashboards as tiles or related information.
- Specifies user privileges for the dashboard.

  End users access dashboards based on user privileges.
- Imports dashboards.

> **Note**
>
> Oracle recommends that you do not modify or edit a delivered dashboard or visualization. You may copy a delivered visualization and then modify it as per your business requirements.

For more information, see *PeopleTools Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data", Understanding Application Data and Insights Dashboards.

For more information about PeopleSoft Search Framework, see Understanding PeopleSoft Insights Using PeopleSoft Search Framework.

Setting up Insights Dashboards for Project Cost Analytics

PeopleSoft Project Costing delivers four Insights dashboards to analyze project cost information using different visualizations.

To set up Insights dashboards:

1. See *Reporting Roll Up Calendars* section in Application Fundamentals: Installation Options - Project Costing Page to determine how the system summarizes the Project Transaction table by week, month, quarter, and year.

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2. Use the Deploy Search Definition page to deploy the search definition (PeopleTools, Search Framework, Administration, Deploy/Delete Object)

   The PeopleSoft Project Costing search definition is EP_PC_PROJ_RES_KIB.

   See Application Fundamentals: Search Definitions and Privileges for a list of Project Costing search definitions.

3. Use the Schedule Search Index page to run the Build Index process (PeopleTools, Search Framework, Administration, Schedule Search Index).

   > **Note**
   >
   > Data Index By Data Partition option is available for EP_PC_PROJ_RES_KIB. The system splits all the data from the selected date range into a number of partitions and then indexes these chunks in parallel.
   >
   > For more information on Index By Data Partition option, refer *Partitioning Application Data in the Search Index Build Process Using Data Partition* in PeopleTools documentation (Search Technology, Administering PeopleSoft Search Framework, Working with Search Indexes).

   The first time you run this process for a search index, you should always select *Full Index* as the **Indexing type**. You can run incremental indexes after that.

4. Use the Deploy Insights Dashboards page to deploy the dashboard and the tile (PeopleTools, Search Framework, Administration, Deploy Insights Dashboards).

   When you deploy a dashboard, you are copying the dashboard from the PeopleSoft database to your instance of PeopleSoft Insights. The deployed dashboard is then available on the Saved Objects page in the Management section on the Insights home page. Use the Deploy Insights Dashboards page to deploy or update a dashboard. For more information on Deploying a Dashboard, see PeopleTools:Search Technology, Working with Insights Dashboards for PeopleSoft Application Data, Deploying a Dashboard.

5. Use the Application Fundamentals: Personalize Homepage Page to add the tile to a homepage.

6. Use the User Roles page to add the privileges to users (PeopleTools, Security, User Profiles, User Profiles).

   The PeopleSoft Project Costing privileges are:

   - Insights PC Edit Privilege
   - Insights PC View Privilege

   For the required privileges, see Application Fundamentals: Search Definitions and Privileges.

Accessing Insights Dashboards on the Project Management Homepage

To access Project Management Insights dashboards, add these tiles to a PeopleSoft Fluid Home page.

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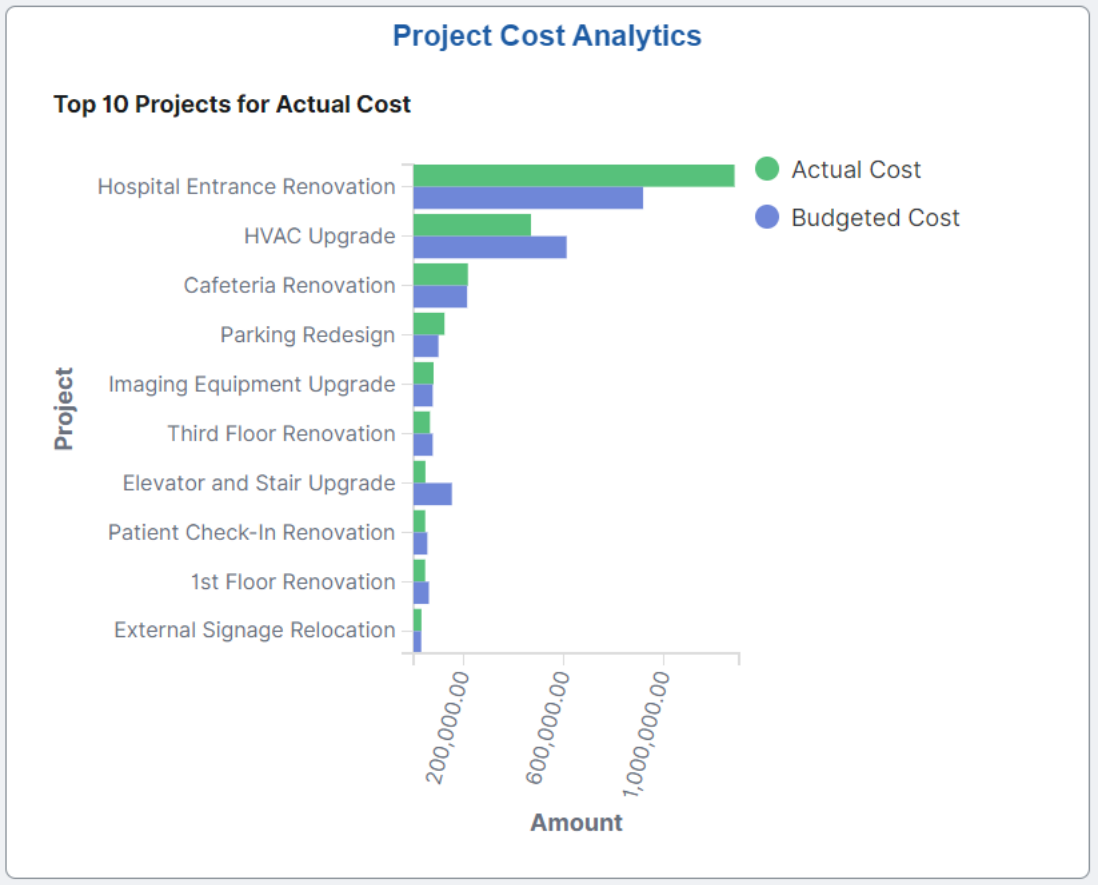
For additional information about how to add a tile to a PeopleSoft Fluid Home page, see Application Fundamentals: Adding Homepages and Tiles and *PeopleTools: Application User's Guide*, "Working With PeopleSoft Fluid User Interface", Working with Fluid Homepages and Dashboards, Managing Tiles on Fluid Homepages and Dashboards.

This example illustrates the Project Cost Analytics tile.



This example illustrates the Project Billing Analytics tile.

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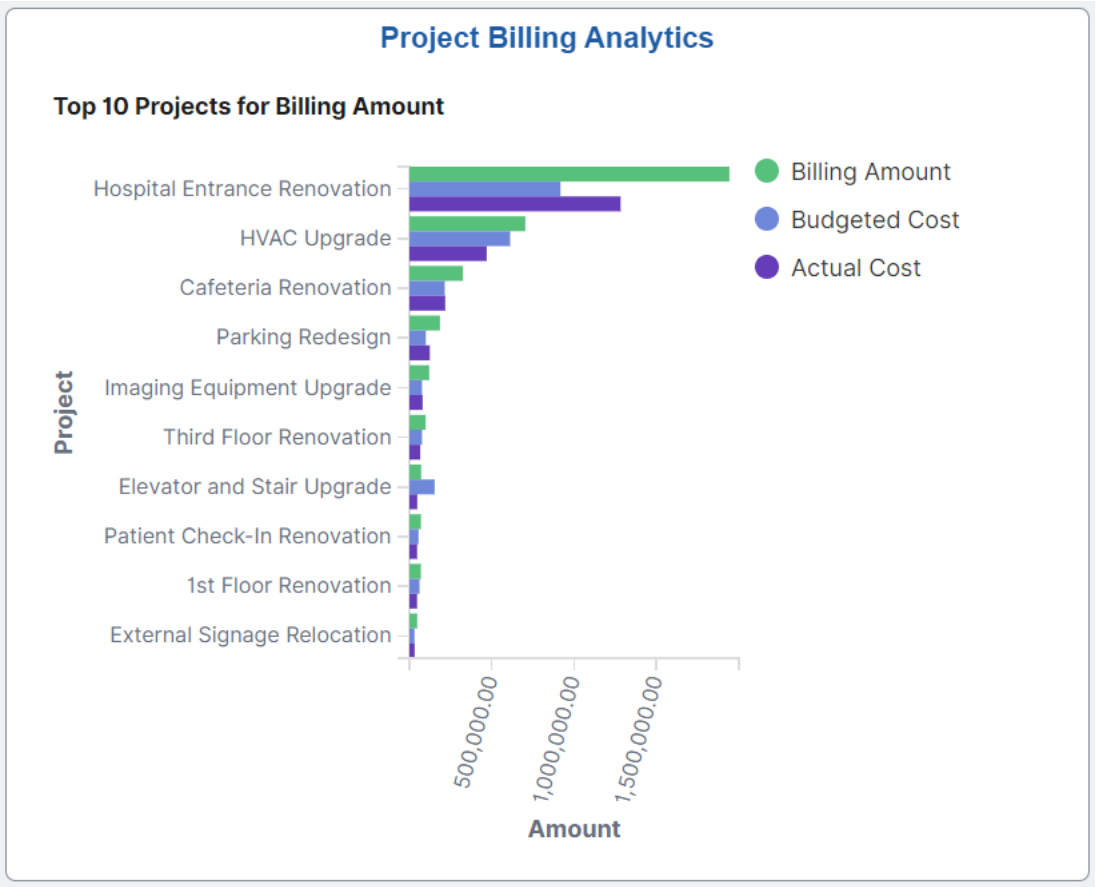

This example illustrates the Project Revenue Analytics tile.

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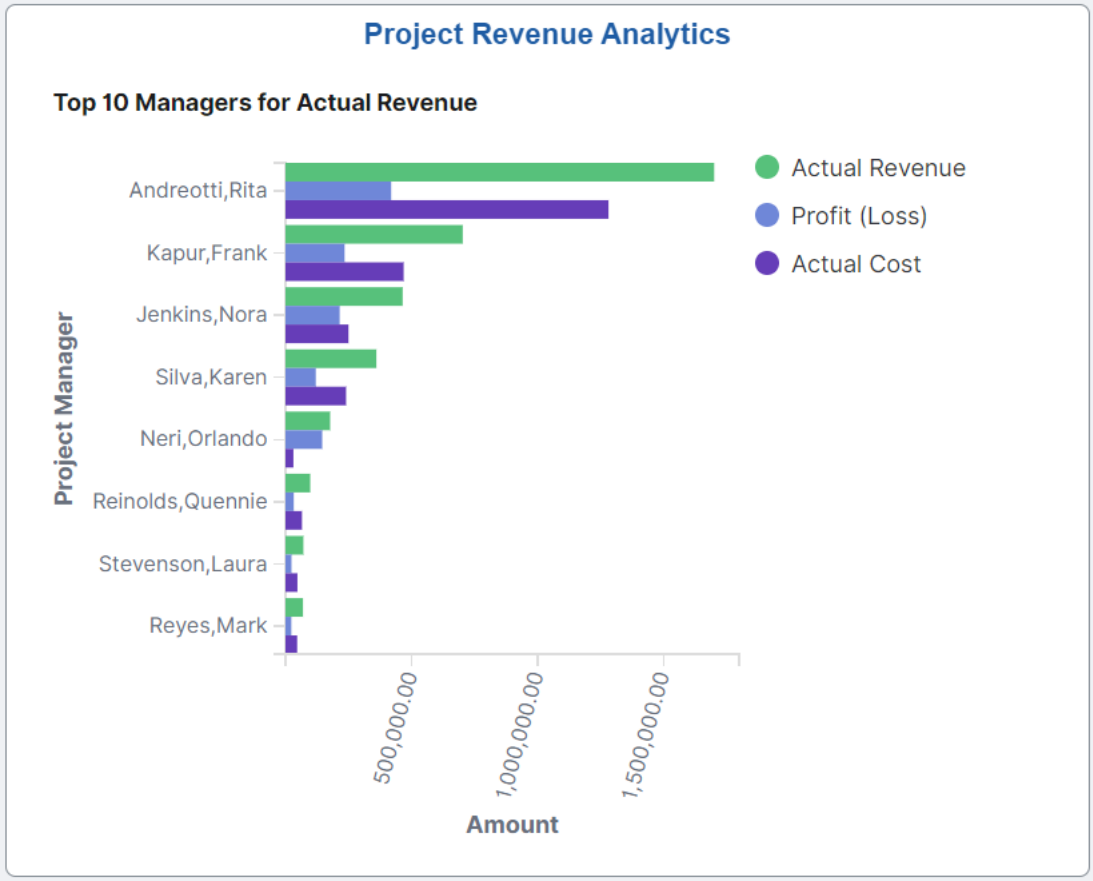

This example illustrates the Year-On-Year Project Analytics tile.

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Analyzing Project Costing Information Using Insights Dashboards

This topic displays and explains how to analyze Project Costing Information using Insights dashboards.

Pages Used to Analyze Project Data using Insights Dashboards

Use these pages to analyze Project Costing Information using Insights dashboards.

Page Name	Definition Name	Usage
Project Cost Analytics Dashboard		Analyze a comparison of Actual Cost and Budgeted Cost.
Project Billing Analytics Dashboard		Analyze a comparison of Billing, Actual Cost, and Budgeted Cost.
Project Revenue Analytics Dashboard		Analyze a comparison of Revenue, Billing, Actual Cost, Budgeted Cost, and Profit.
Year-Over-Year Project Analytics Dashboard		Analyze Billing, Actual Cost, Revenue, and Profit for current and previous two years.

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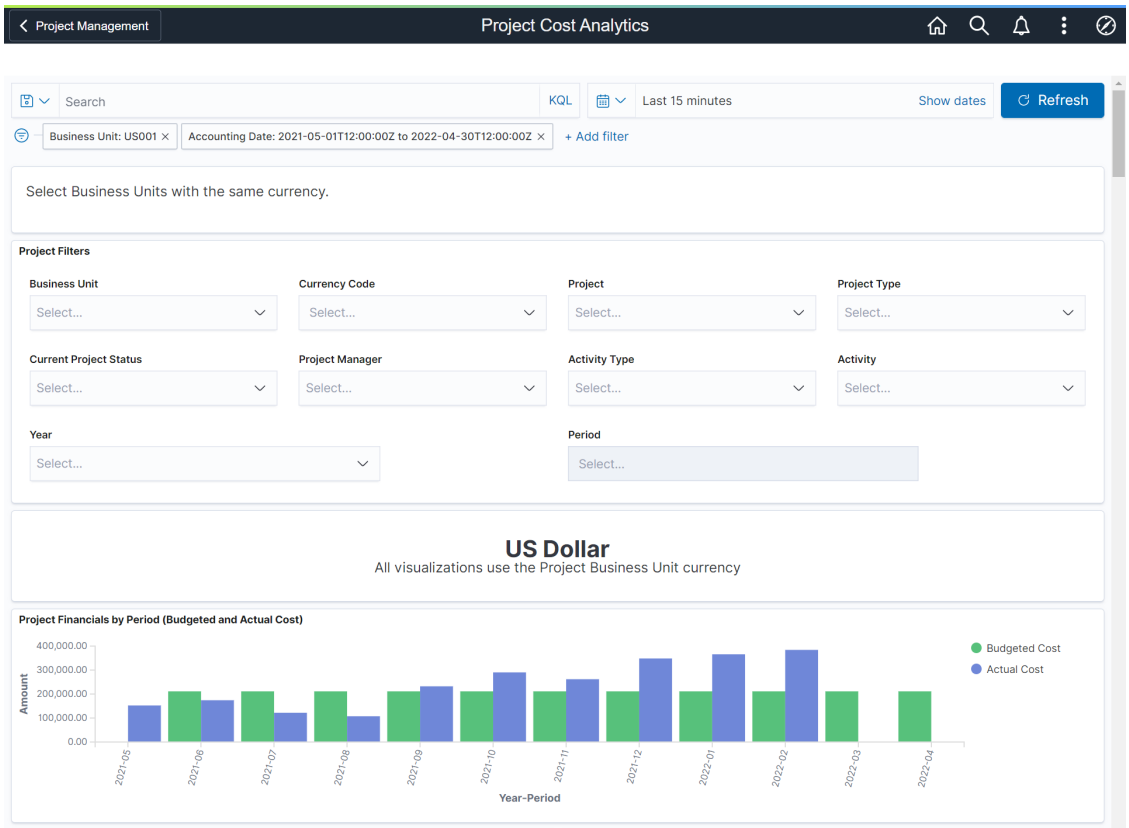
Project Cost Analytics Dashboard

Use the Project Cost Analytics dashboard to analyze a comparison of Actual Cost and Budgeted Cost. This includes analytics by project, manager, vendor/supplier, employee, source type, and project type.

Navigation:

Select the Project Cost Analytics tile.

This example illustrates the fields and controls on the Project Cost Analytics Dashboard (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Project Cost Analytics Dashboard (2 of 2).

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Summarized Budgeted and Actual Cost Amounts by Period grid displays the summarized Budgeted and Actual Cost amount over the time period.

Methods for Reporting Project Information

The following applies to the Project Cost, Project Billing, Project Revenue, and Year-Over-Year dashboards.

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All transactions are displayed in the currency for the projects business unit. If selecting multiple business units in the filter, be sure to select business units with the same currency.

The Business Unit filter defaults the Business Unit from the user's Project Preferences. The accounting date range defaults the last month's using the current date.

Transactions are sourced from the project costing PROJ_RESOURCE table. Transactions are reported by month using the Accounting Date on the transaction. Accounting Dates are categorized by month and year using the monthly reporting calendar on the Project Installation Options page. See *Reporting Roll Up Calendars* section in Application Fundamentals: Installation Options - Project Costing Page.

Analysis types and analysis groups are used for categorizing a transaction as budgeted cost, actual cost, billing, revenue and profit. The analysis groups are driven primarily from the installation options page and referenced in the underlying query supporting the index. Organizations should expect to change the logic in the underlying query to align with their use of project costing.

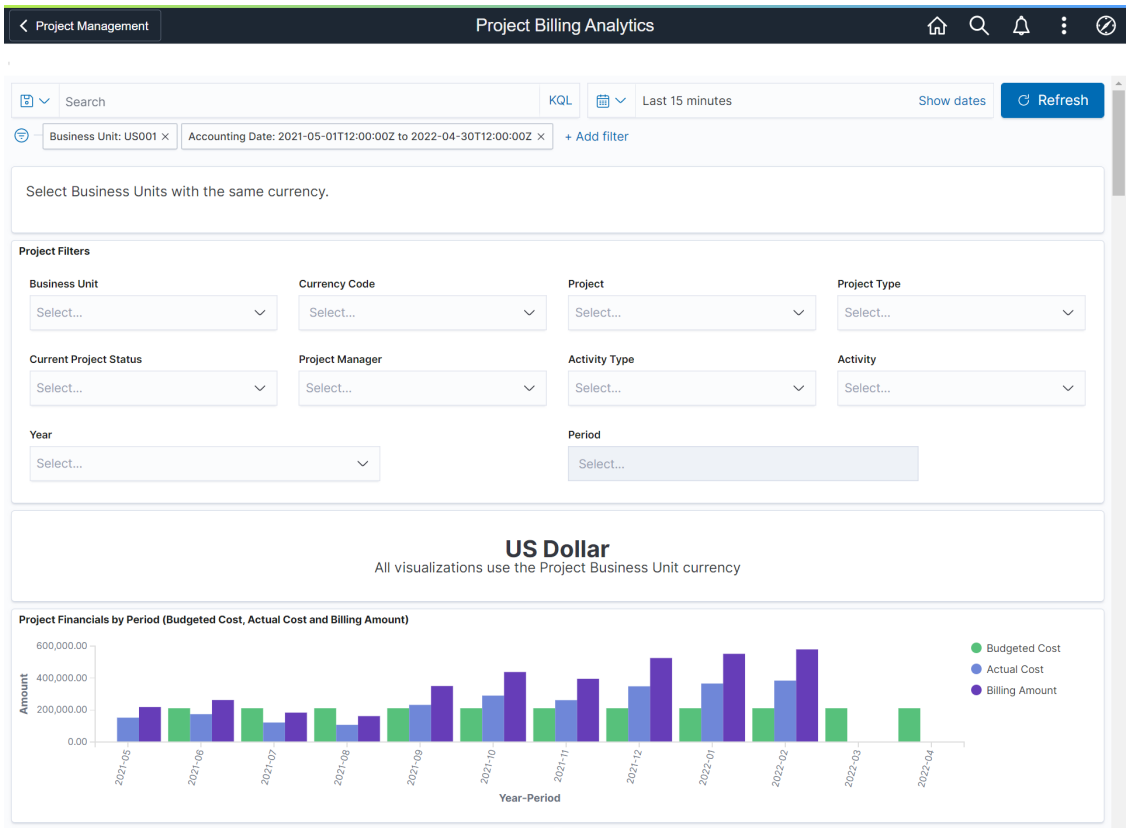
Project Billing Analytics Dashboard

Use the Project Billing Analytics dashboard to analyze billings to customers and sponsors to budgeted cost and actual cost. This includes analytics by project, manager, vendor/supplier, and employee.

Navigation:

Select the Project Billing Analytics tile.

This example illustrates the fields and controls on the Project Billing Analytics Dashboard (1 of 2).



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This example illustrates the fields and controls on the Project Billing Analytics Dashboard (2 of 2).

Project Revenue Analytics Dashboard

Use the Project Revenue Analytics dashboard to analyze Revenue, Billing, Budgeted Cost, Actual Cost, and Profit for your projects. This includes analytics by project, manager, vendor/ supplier, and employee.

Navigation:

Select the Project Revenue Analytics tile.

This example illustrates the fields and controls on the Project Revenue Analytics Dashboard (1 of 2).

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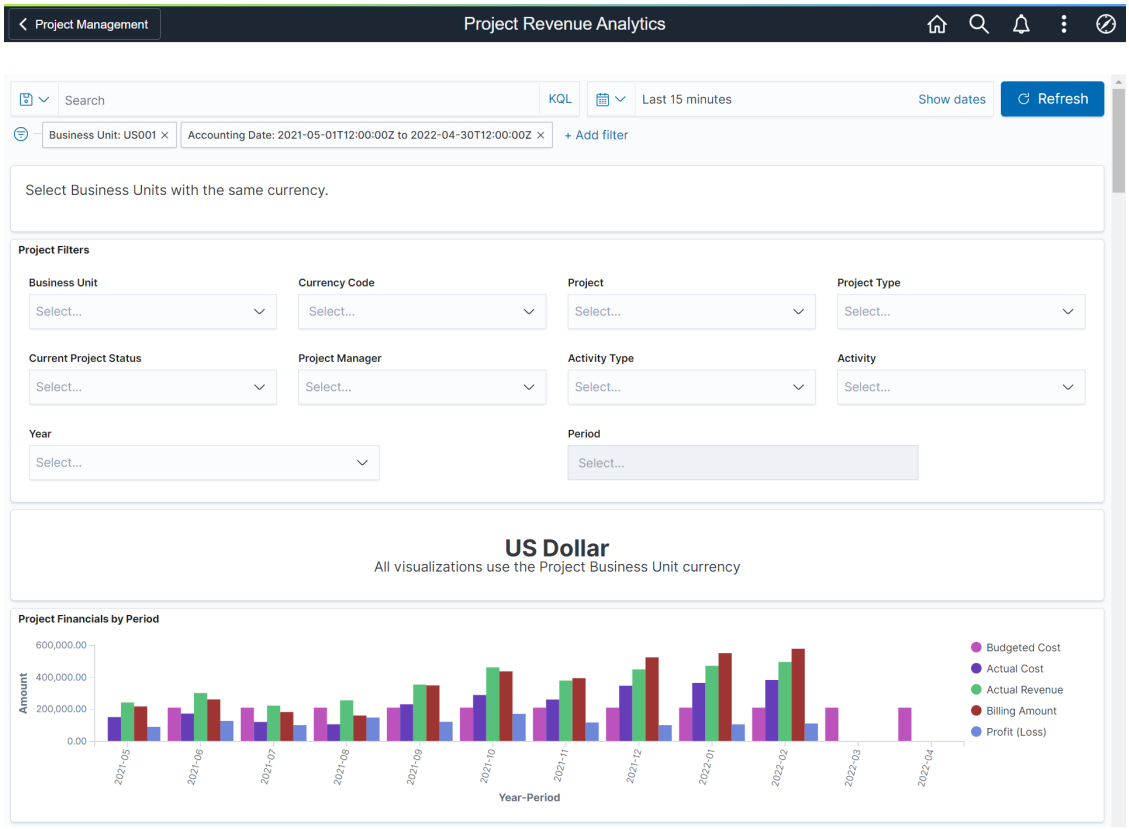

This example illustrates the fields and controls on the Project Revenue Analytics Dashboard (2 of 2).

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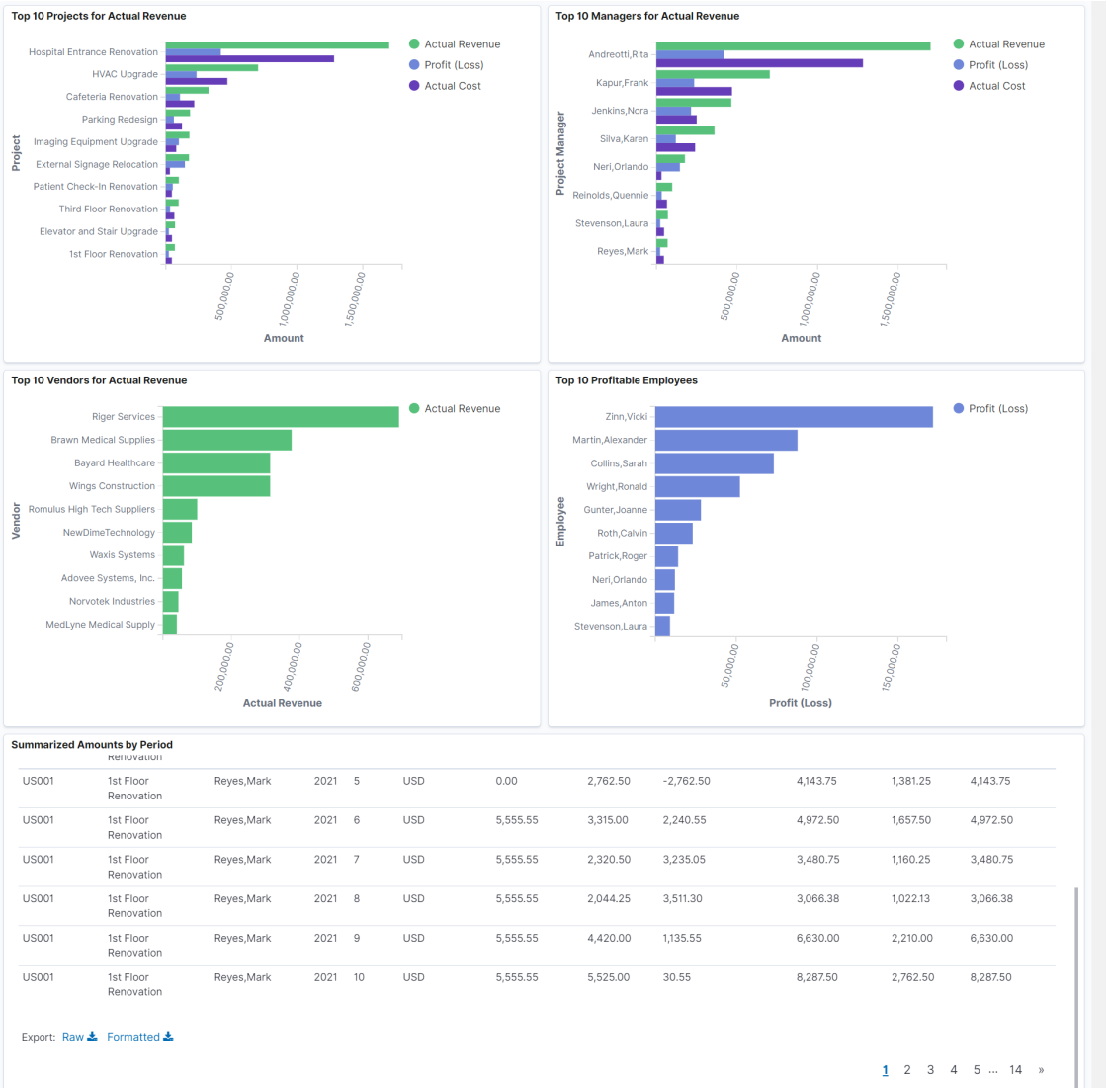

Year-Over-Year Project Analytics Dashboard

Use the Year-Over-Year Project Analytics dashboard to analyze Actual Cost, Billing, Revenue, and Profit for current and previous two years.

Navigation:

Select the Year-On-Year Project Analytics tile.

This example illustrates the fields and controls on the Year-Over-Year Project Analytics Dashboard (1 of 2).

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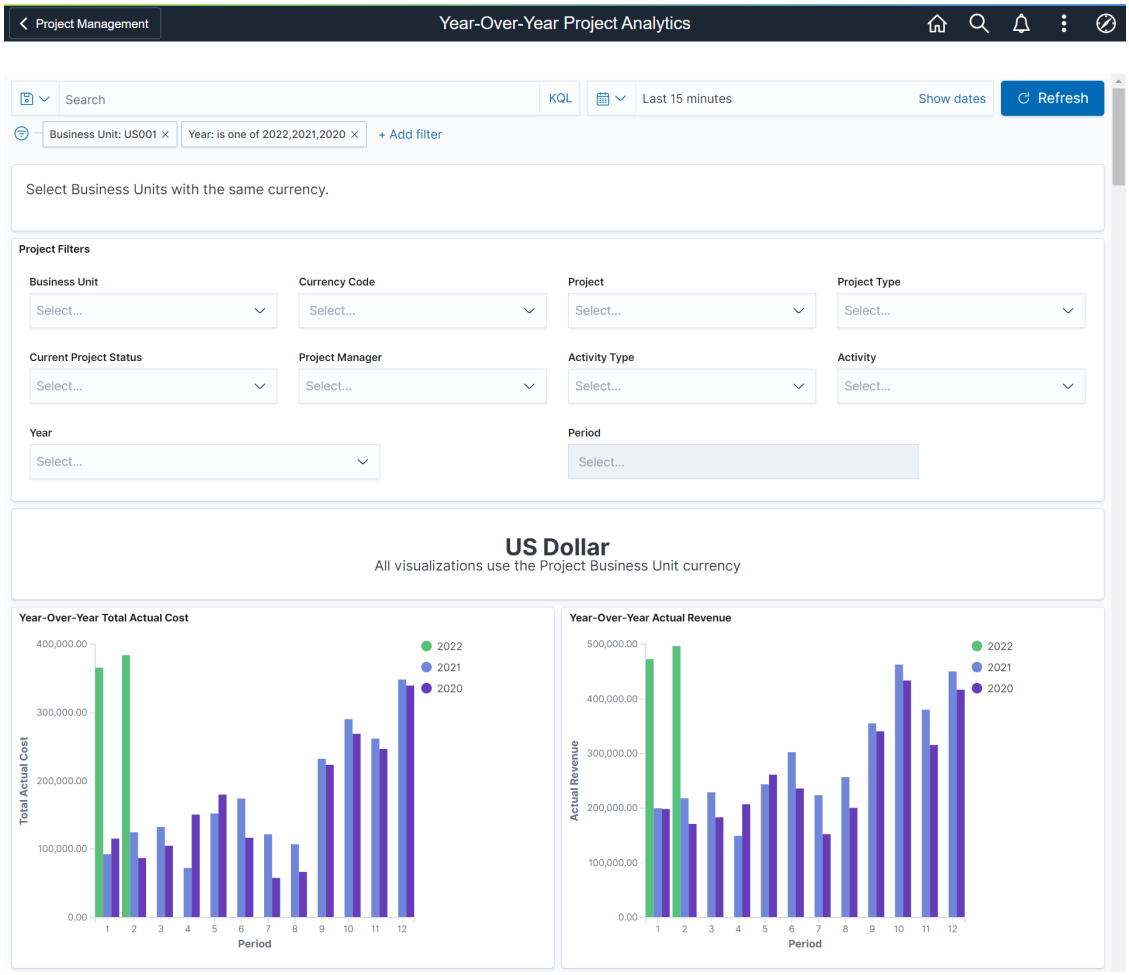

This example illustrates the fields and controls on the Year-Over-Year Project Analytics Dashboard (2 of 2).

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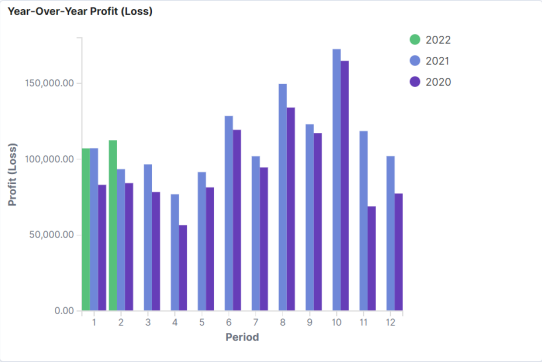

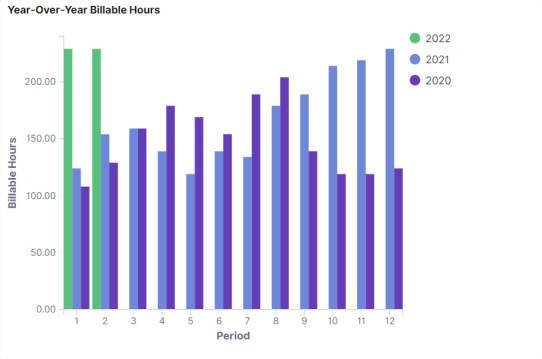

Summarized Amounts by Year

US001	1st Floor Renovation	Reyes,Mark	2021	USD	66,666.60	40,001.00	26,665.60	60,001.52	20,000.52	60,001.52
US001	1st Floor Renovation	Reyes,Mark	2020	USD	66,666.60	144,392.75	-77,726.15	29,089.15	-115,303.60	29,089.15
US001	Cafeteria Renovation	Silva,Karen	2022	USD	233,333.20	66,925.53	166,407.67	100,388.30	33,462.77	100,388.30
US001	Cafeteria Renovation	Silva,Karen	2021	USD	233,333.40	187,588.40	45,745.00	281,382.60	93,794.20	281,382.60
US001	Cafeteria Renovation	Silva,Karen	2020	USD	233,333.40	90,944.10	142,389.30	411,416.15	320,472.05	411,416.15
US001	Consulting - Customize		2020	USD	0.00	90.00	-90.00	99.00	9.00	99.00
US001	Corrective Maintenance		2021	USD	0.00	7,226.18	-7,226.18	0.00	-7,226.18	0.00
US001	Elevator and Stair Upgrade	Stevenson,Laura	2022	USD	166,666.40	14,593.95	152,072.45	21,890.93	7,296.98	21,890.93
US001	Elevator and Stair Upgrade	Stevenson,Laura	2021	USD	166,666.80	40,906.00	125,760.80	61,359.00	20,453.00	61,359.00

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14

Integrating with Commitment Control

Understanding Integration Between PeopleSoft Project Costing and PeopleSoft Commitment Control

Commitment Control is an optional feature of Oracle's PeopleSoft Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management product lines. It enables you to control expenditures against predefined, authorized cost, or revenue budgets.

This topic discusses:

- Setup requirements.
- Integration process flow.
- Project Costing to Commitment Control process.
- Commitment Control to Project Costing process.
- Budget checking errors and exceptions.
- Security.

> **Note**
>
> This topic is supplemental to PeopleSoft Commitment Control and provides information about the integration between PeopleSoft Project Costing and PeopleSoft Commitment Control. Refer to PeopleSoft Commitment Control: Integration of Commitment Control with PeopleSoft Applicationsfor complete information about PeopleSoft Commitment Control functionality.

Related Topics

- PeopleSoft Commitment Control: Integration Diagram of Commitment Control With PeopleSoft and Third-Party Applications

Setup Requirements

After you enable PeopleSoft Project Costing and PeopleSoft General Ledger for PeopleSoft Commitment Control on the Installation Options - Installed Products page, complete the steps to configure Commitment Control for integration with Project Costing.

The PeopleSoft Commitment Control: Understanding Basic Commitment Control Setup and PeopleSoft General Ledger: Understanding General Ledger Business Units and Options topics discuss the steps required to configure those systems to integrate with PeopleSoft Project Costing, such as setting up basic Commitment Control options, source transaction types, and security.

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Complete these steps to configure PeopleSoft Project Costing to integrate with PeopleSoft Commitment Control:

1. Set up integration templates to integrate with the appropriate general ledger (GL) business unit.

   Select the **Primary Ledger Business Unit** check box on the Integration Templates - General Ledger Integration page to designate the primary GL business unit to use for budget creation and budget checking when this integration template is specified on the project.

2. Designate at the installation level the analysis groups that contain the analysis types to use to create revenue and expense budgets in PeopleSoft Project Costing.

   You can override the budget analysis group at the project level.

   See Application Fundamentals: Installation Options - Project Costing Page.

3. At the set ID level, designate the analysis types that identify the transactions that must be budget checked before they are sent to the Project Transaction table (PROJ_RESOURCE).

   Map the relationship between the source transaction definition and transactions in PeopleSoft Project Costing by using the **Commitment Control Amount Type** field on the Analysis Types Page. PeopleSoft General Ledger delivers two source transaction definitions for PeopleSoft Project Costing: PC_JOURNAL (used for both cost and revenue transaction rows) and PC_BUDGET (used to create budgets).

> **Note**
>
> You cannot disable Commitment Control for specific projects or processes.

Related Topics

- PeopleSoft Commitment Control: Understanding Source Transaction Type Setup
- PeopleSoft Commitment Control: Defining Source Transaction Types

Integration Process Flow

The integration process flow begins with the creation of a budget in PeopleSoft Project Costing. Project budget rows and actual cost transactions can originate from several sources, such as:

- Creating a budget plan and details in PeopleSoft Project Costing.
- Adding actual cost transactions on the Add Transactions page in PeopleSoft Project Costing.
- Importing budget rows from PeopleSoft Grants.
- Importing budget rows and actual cost transactions from Microsoft Project.
- Importing budget rows from PeopleSoft Planning and Budgeting.
- Running the Funds Distribution process, see Understanding Funds Distribution

For more information about budgeting project costs and revenue, see Understanding Project Cost and Revenue Budgets.

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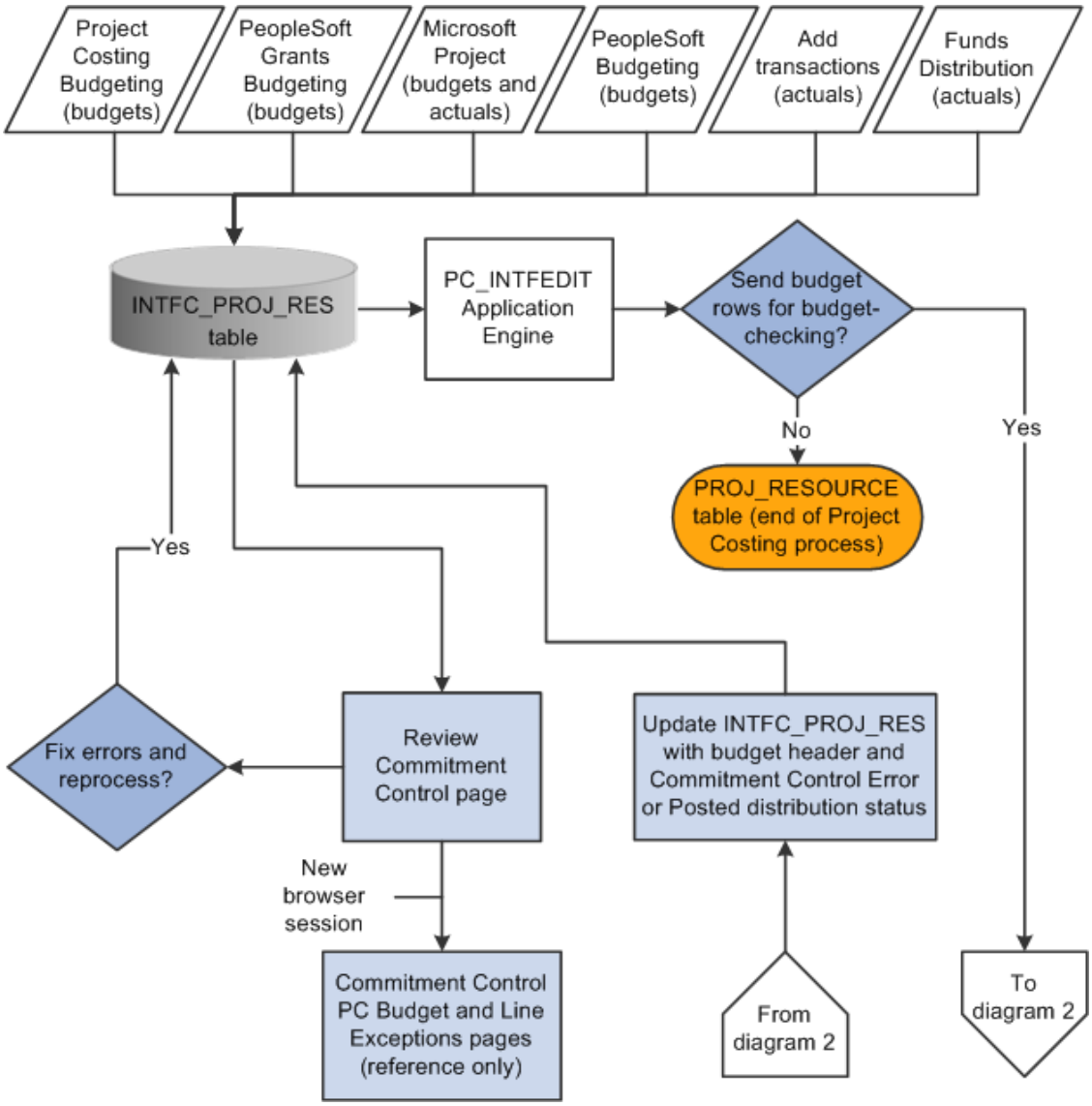
Several different application engine processes play a key role in integrating PeopleSoft Project Costing and Commitment Control. The budget rows in PeopleSoft Project Costing are staged in the project transaction interface table (INTFC_PROJ_RES) until the Load Third-Party Transactions (PC_INTFEDIT) application engine process determines which rows need to be budget checked in Commitment Control. The Load Third-Party Transactions process triggers the Project Costing to Commitment Control Application Engine (PC_TO_KK) process to send budget rows and cost transactions that require budget checking to Commitment Control. The Project Costing to Commitment Control process triggers the Budget Processor (FS_BP) application engine process to budget check the transactions against the Commitment Control budget. If the available budget amount is not sufficient or the transaction receives some other budget-related exception, the budget processor records errors and exceptions are logged in the system. Finally, the Project Costing to Commitment Control process updates the project transaction interface table with the Commitment Control distribution status of error or posted. After the transaction rows successfully post to Commitment Control and the project transaction table, the system deletes the rows from the project transaction interface table.

The following diagram shows the processing flow for the Project Costing to Commitment Control process, part 1:



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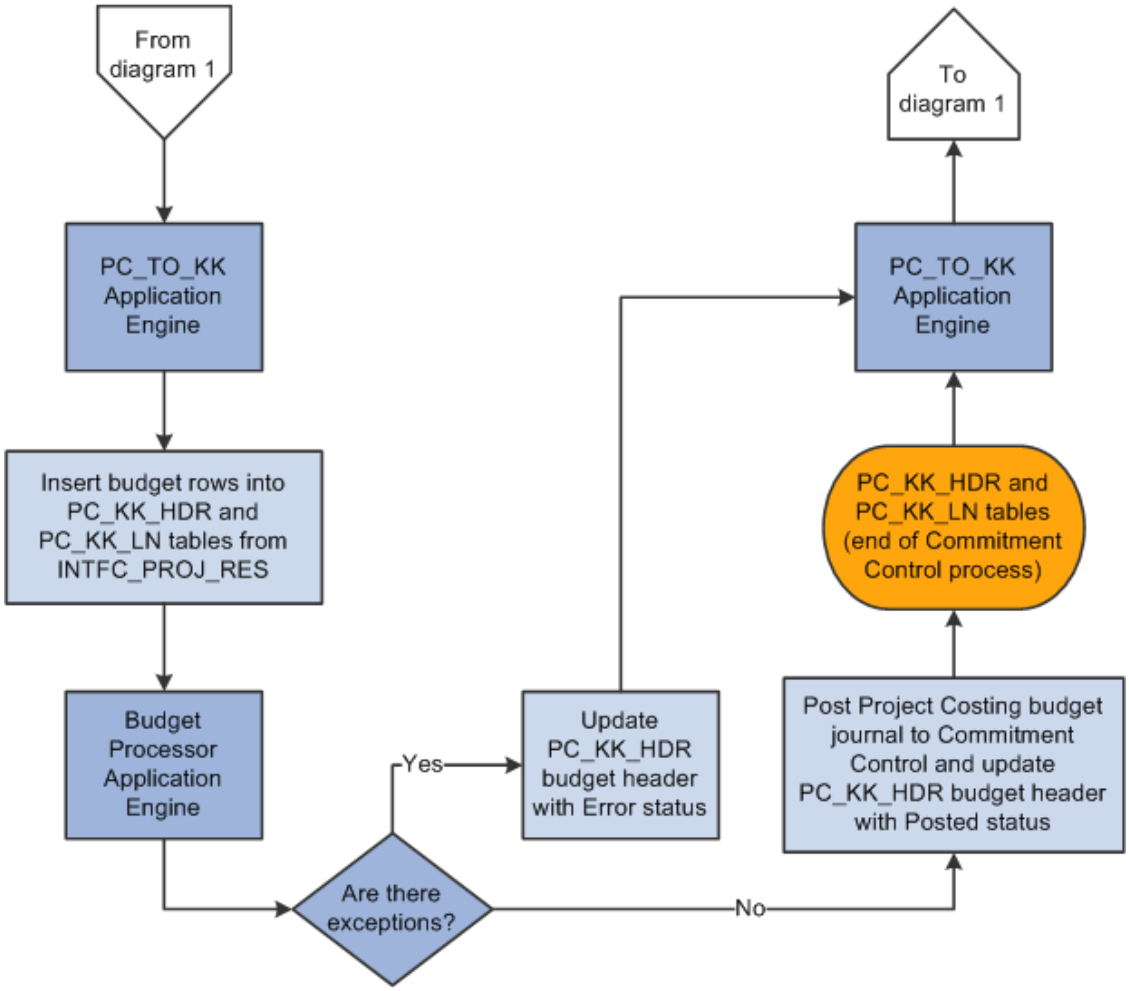
The following diagram shows the processing flow for the Project Costing to Commitment Control process, part 2:



Project Costing to Commitment Control Process

The Project Costing to Commitment Control process:

- Loads Project Costing Commitment Control rows from the Project Transaction Interface table to the Commitment Control Header (PC_KK_HDR) and Commitment Control Line (PC_KK_LN) staging tables.
- Creates transaction IDs that the system uses to identify rows that it posts to the Project Transaction table.

  You can view transaction IDs in the Project Details tab of the Project Budget Periods - Adjust Budget Periods page.
- Checks budget entry or adjustment security.
- Based on the budget definition, sends only defined ChartField data to Commitment Control and retains the budget detail data in PeopleSoft Project Costing.

  When you send a new budget from PeopleSoft Project Costing to Commitment Control, the Project Costing to Commitment Control process adds the project to the Control ChartField page in Commitment Control when *Project* is specified as the control ChartField in the budget definition.

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- Converts the currencies of the project transaction amounts to the base currency of the general ledger business unit that is integrating with PeopleSoft Project Costing.
- Calls the Commitment Control Budget Processor.
- Updates rows in the Project Transaction Interface table with either a *Posted* or an *Error* Commitment Control distribution status and budget header status after the Budget Processor completes.
- Creates journal IDs that appear on the Commitment Control tab of the Project Budget Periods - Adjust Budget Periods page after transactions successfully post to Commitment Control tables.

  The Commitment Control transactions in the Project Transaction Interface table serve as PeopleSoft Project Costing journal entries. The journal ID acts as a link so you can drill down to the Commitment Control Budget Details page.

The budget period is a required field in the budget journal. For budget rows that originate in PeopleSoft Grants, the Project Costing to Commitment Control process derives the budget period from the calendar ID on the Keys and Translations page in Commitment Control based on the accounting dates in the Project Transaction table. For budget rows that originate in Projects Budgeting, the budget period is based on the budget plan calendar.

The Project Costing to Commitment Control process does not create fund source allocations.

For more information about Commitment Control Security, see PeopleSoft Commitment Control: Understanding Commitment Control Security.

Commitment Control to Project Costing Process

Use the Commitment Control to Project Costing Application Engine process (PC_KK_TO_PC) to post budget transactions in PeopleSoft Project Costing that you enter directly into Commitment Control. Rows are eligible to post in Project Costing if both of these conditions exist:

- The Project Costing distribution status of the journal line is *N* (new).
- The ledger group type is either expenses or revenue.

After you post budget journals directly into Commitment Control, if Projects Budgeting is enabled at the installation level and you run the Commitment Control to Project Costing process, the system:

- Populates the Project Transaction Interface table.
- Triggers the Budget Loader Application Engine process (PC_BUDGET_IN) that populates the Project Budgeting tables (PC_BUD_PLAN, PC_BUD_ITEM, and PC_BUD_DETAIL).
- Updates the **Project Costing Distribution Status** field (PC_DISTRIB_STATUS) value to *D* (distributed) on the Commitment Control Budget Journal Line table (KK_BUDGET_LN).

If you create a budget journal in Commitment Control and run the Commitment Control to Project Costing process and if Projects Budgeting is enabled at the installation level and no current active budget plan exists for that project, then the system:

- Modifies the **Project Costing Distribution Status** field value of the journal row to *D* (distributed).
- Creates a budget plan in PeopleSoft Project Costing with an active status.

For example, assume that you post Journal A and Journal B to Commitment Control. Both journals have identical ChartField values. The Commitment Control to Project Costing process creates one active budget plan that contains both journals.

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If you subsequently unpost the budget journal in Commitment Control and run the Commitment Control to Project Costing process, the system:

- Resets the **Project Costing Distribution Status** field value for the journal row back to *N* (new) if the original **Project Costing Distribution Status** field for the row was *D.*
- Modifies the status of the existing budget plan to *Inactive.*
- Creates a new budget plan with an active status that represents the reversal of the previous budget plan.

  The new budget plan contains the same amounts as the previous plan but with the multiplier signs reversed.
- Sends the new budget rows to the Project Transaction Interface table and Project Budgeting tables.

For example, assume that you post Journal A to Commitment Control and run the Commitment Control to Project Costing process. The process creates Budget Plan A as the active budget plan. Then you unpost Journal A in Commitment Control and run the Commitment Control to Project Costing process. The system changes the status of Budget Plan A to Inactive and creates Budget Plan B as the active budget plan, which represents the reversal of Budget Plan A.

If you create a budget journal in Commitment Control and run the Commitment Control to Project Costing process and if Projects Budgeting is enabled at the installation level and an active budget plan already exists in PeopleSoft Project Costing, then the system:

- Modifies the status of the existing budget plan in PeopleSoft Project Costing to *Inactive.*
- Creates a new budget plan in PeopleSoft Project Costing with an active status.
- Sends the new budget rows to the Project Transaction Interface table and Project Budgeting tables.
- Modifies the **Project Costing Distribution Status** field value for the journal row to *D.*

For example, assume that you post Journal A to Commitment Control and run the Commitment Control to Project Costing process. The process creates Budget Plan A as the active budget plan. Then you post Journal B and run the Commitment Control to Project Costing process. The system changes the status of Budget Plan A to *Inactive,* and creates Budget Plan B as the active budget plan.

You must define the project ID, activity ID, and Project Costing business unit as key ChartFields if you create budgets directly in Commitment Control and send them to Project Costing by using the Commitment Control to Project Costing process.

The Commitment Control to Project Costing process uses the analysis groups for the revenue budget and the cost budget that are specified on the Project Costing Definition page for the project. The process uses the first analysis type listed in the appropriate analysis group. For example, assume that you use the *RBUD* (Revenue Budget Group) analysis group for revenue budgets and the *BUD* (Budgets) analysis group for cost budgets. The analysis type *RB1* (Revenue Budget 1) is listed first in the *RBUD* analysis group. Therefore, the process uses *RB1* to post revenue budgets to the budget plan and the Project Transaction table.

When you generate a budget plan by using the Commitment Control to Project Costing process, the budget item default value is *Other.*

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> **Note**
>
> If you create a budget journal in Commitment Control and Projects Budgeting is enabled at the installation level, you cannot change the default budget item in the project budget. In this way the system prevents you from changing the budget item from *Other* to another value, which would result in changing the ChartField values to correspond to the new budget item.

If you create budgets in PeopleSoft Project Costing, you must also adjust the budgets in Project Costing.

If you create a new budget journal in Commitment Control and Projects Budgeting is not enabled at the installation level, the Commitment Control to Project Costing process sends transaction rows to the Project Transaction Interface table and does not create a budget plan.

Related Topics

- PeopleSoft Commitment Control: Setting Up Control Budget Definitions

Budget Checking Errors and Exceptions

If the Commitment Control Budget Processor encounters an error, the system stores the transaction in the Commitment Control Transaction Exceptions table (KK_EXCPTN_TBL) and updates the row in the Project Transaction Interface table with a Commitment Control distribution status and budget header status of *Error.* Use the Review Commitment Control page to correct the errors and:

- Drill to the source of the transactions.
- Access the Commitment Control PC (Project Costing) Budget Exceptions page.
- Access the Commitment Control PC Line Exceptions page.
- Access the PeopleSoft Project Costing Budget Plan page for the project.
- Resubmit transactions to Commitment Control for a specific interface ID.

Security

PeopleSoft Project Costing uses the Commitment Control Budget Entry or Adjustment security event to enable you to restrict entry of a budget amount to a limited set of users.

Additionally, you can restrict users to specific budgets by using ChartField values on the Commitment Control Security Field Setup page.

The system records security errors in the Project Transaction Interface table just as it does with budget checking errors. You can view security errors on the Review Commitment Control page.

For more information about Commitment Control security, see PeopleSoft Commitment Control: Understanding Commitment Control Security.

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Setting Up PeopleSoft Project Costing for PeopleSoft Commitment Control

Pages Used to Set Up PeopleSoft Project Costing for PeopleSoft Commitment Control

Page Name	Definition Name	Usage
General Ledger Integration Page	PROJ_INT_TMPL_03	Select the **Primary Ledger Business Unit** check box to designate the integration template as the primary general ledger business unit that is used for budget creation and budget checking when this integration template is specified for a project.
Application Fundamentals: Installation Options - Project Costing Page	INSTALLATION_PC	In the **Analysis Groups Default** group box: • Select an analysis group from the **Cost Budget** drop-down list box. The default value is *BUD*. • Select an analysis group from the **Revenue Budget** drop-down list box. The default value is *RBUD*.
Analysis Types Page	PROJ_ANTYPE_DEFN	Designate a Commitment Control amount type for the analysis types that will be used for Commitment Control budget checking.
Project Costing Definition Page	PROJECT_GEN_01	If necessary, override the default budget analysis group by selecting different analysis types that identify a budget. In the **Grants** group box, specify if the project is grant funded. The **Grants** group box is visible only if PeopleSoft Grants is installed and you access the Project Costing Definition page by using the **Grants**, and then **Awards**, and then **Establish Project General Info**portal navigation.

Related Topics

- Analysis Types Page
  Use the Analysis Types page (PROJ_ANTYPE_DEFN) to create and modify analysis types.

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Analysis Types Page

Use the Analysis Types page (PROJ_ANTYPE_DEFN) to designate a Commitment Control amount type for the analysis types that will be used for Commitment Control budget checking.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **Analysis Types**, and then **Analysis Types**

Field or Control	Description
Commitment Control Amount Type	To set up Commitment Control analysis types, select a **Commitment Control Amount Type** value to identify how transactions of this analysis type are used in Commitment Control budget checking.
Source Transaction Type	Displays either the *PC_JOURNAL* or *PC_BUDGET* transaction type that is defined in the Commitment Control feature. The source transaction type maps PeopleSoft Project Costing fields to Commitment Control fields.

This table lists the delivered analysis types and amount types that are used for Commitment Control:

Analysis Type	Commitment Control Amount Type	Commitment Control Ledger Group Type
REQ	*Pre-Encumbrance:* Designates requisitions.	Expense
CRQ	*Pre-Encumbrance:* Designates cost sharing requisitions.	Expense
COM	*Encumbrance:* Designates purchase orders.	Expense
ACT	*Actuals and Recognized:* Designates actual cost expenses for expense type ledger groups and recognized revenue for revenue type ledger groups.	Expense Revenue

Related Topics

- Analysis Types Page
  Use the Analysis Types page (PROJ_ANTYPE_DEFN) to create and modify analysis types.

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Budget Checking Transactions in Commitment Control

Pages Used to Budget Check Transactions in Commitment Control

Page Name	Definition Name	Usage
Load Transactions Page	PC_INTFEDIT	Run the Load Third-Party Transactions process to send transactions to the Project Transaction table from the Project Transaction Interface table after they are budget checked against Commitment Control journal rows.
Review Commitment Control Page	PC_KK_INTFC_EXCEPT	Fix Commitment Control errors, update the Commitment Control distribution status to *New,* and rerun the Load Third-Party Transactions process to load the corrected transactions.

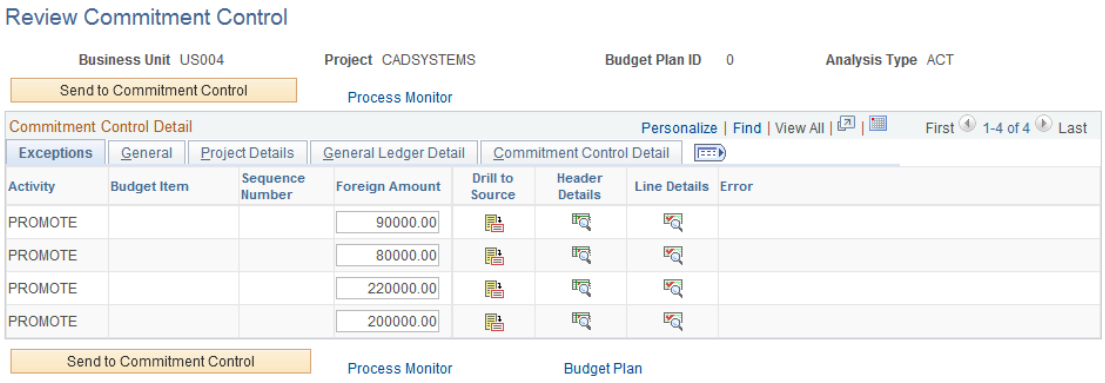
Review Commitment Control Page

Use the Review Commitment Control page (PC_KK_INTFC_EXCEPT) to fix Commitment Control errors, update the Commitment Control distribution status to New, and rerun the Load Third-Party Transactions process to load the corrected transactions.

Navigation:

Project Costing, and then **Budgeting**, and then **Review Commitment Control**, and then **Review Commitment Control**

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



Review the Commitment Control error messages and make corrections as required.

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> **Note**
>
> If you change any ChartField, ledger, ledger group, or budget item value on this page for transactions that originate in Projects Budgeting (system source of PCB), the system updates the corresponding fields on this page with the new value on rows that contain the same value of project business unit, project, activity, budget item, and sequence number. For example, if you change the **Category** ChartField value on the first row from blank to *Cost,* the Category value changes to *Cost* for other rows in the grid that contain the same project business unit, project, activity, budget item, and sequence number.

Field or Control	Description
Send to Commitment Control	Click to initiate the PC_WRAPPER Application Engine process for the corresponding interface ID. The PC_WRAPPER process contains the Load Third-Party Transactions process, Project Costing to Commitment Control process, and the Budget Processor. Prior to sending the transactions back through the Security and Budget Processor, the system resets the Commitment Control distribution status, Project Costing distribution status, and budget header status to *N* (new).

Exceptions

The Exceptions tab displays the activity, budget item, sequence number, amount, and error that are associated with the budget row. Modify the **Foreign Amount** field as required.

Field or Control	Description
Drill to Source	Click to access the Budget Detail page for the budget plan if the entry originated in Projects Budgeting. Click **Drill to Source** to access the Transaction List page if the transaction originated from Grants Budgeting or the Add Transactions page. Click **Return to Review Commitment Control** to return to the Review Commitment Control page.
Header Details	Click to access the Commitment Control PC Budget Exceptions page in a new browser window. Close the new browser window to return to the Review Commitment Control page.
Line Details	Click to access the Commitment Control PC Line Exceptions page in a new browser window. Close the new browser window to return to the Review Commitment Control page.
Budget Plan	Click to access the Budget Plan page for the project.

Projects Detail

On the Projects Detail tab, you can modify the project ChartField values for the source type, category, subcategory, and other resource-related information.

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Field or Control	Description
Projects Distribution Status	Displays the Project Costing distribution status. Values are: *Not Distributed* (N): The new transaction row is created in Projects Budgeting but is not distributed to the Project Transaction table. *Distributed* (D): The Projects Budgeting transaction row is distributed to the Project Transaction table.
Transaction ID	Displays the transaction ID that the system creates during the Project Costing to Commitment Control process.

Commitment Control Detail

Field or Control	Description
Budget Header Status	Displays the budget checking header status. Values are *Error* (E): The transaction failed the budget posting process. *Valid* (V): The transaction passed budget checking and posted correctly. *Not Chk'd* (not checked) (N): The Budget Processor has not processed the transaction.
Commitment Control Status	Displays the Commitment Control distribution status. Values are: *Budget Check* (B): System processing status that the Project Costing to Commitment Control process assigns to indicate that the budget is budget checked. *Budget Create* (C): System processing status that the Project Costing to Commitment Control process assigns to indicate that the budget is created. *Distributed* (D): System processing status that the Project Costing to Commitment Control process assigns to indicate that the budget is distributed in Commitment Control. *Posting Error* (E): The transaction encountered an error during the Project Costing to Commitment Control process. *Security Error* (S): The transaction encountered an error during the Project Costing to Commitment Control process due to improper security.
Set Options	Click to access the Set Options page, where you can view budget ChartFields and modify budget status and budget control options. **Note:** This button is only enabled when the ledger group is a Commitment Control type ledger group. See PeopleSoft Commitment Control: Defining Control Budget Attributes.

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Sending Commitment Control Transactions to PeopleSoft Project Costing

This topic discusses how to run the Commitment Control to Project Costing process.

Page Used to Send Commitment Control Transactions to PeopleSoft Project Costing

Page Name	Definition Name	Usage
Commitment Control Page	PC_KK_TO_PC	Send budget transactions that you enter in Commitment Control to the Project Transaction Interface table.

Commitment Control Page

Use the Commitment Control page (PC_KK_TO_PC) to send budget transactions that you enter in Commitment Control to the Project Transaction Interface table.

Navigation:

Project Costing, and then **Budgeting**, and then **Retrieve Commitment Control**, and then **Commitment Control**

Field or Control	Description
Date Option	Select an option to specify which transactions to include in this run control. Available options are: *All:* Selects all rows from Commitment Control regardless of the accounting date or transaction date. *Accounting Date:* Selects rows based on the journal date from the budget header. *Transaction Date:* Selects rows based on the budget date from the budget line.

Working with Entry Events

Pages Used to Work with Entry Events

Page Name	Definition Name	Usage and Navigation
Application Fundamentals: Entry Event Source Definition Page	EE_SRC_DEFN	View predefined entry event source transaction definitions with the data structures and records that are used by the entry event processor.

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Page Name	Definition Name	Usage and Navigation
Application Fundamentals: Entry Event Code Definition Page	EE_EVENT_CODE_DEFN	Define entry event codes that are entered in the detail distribution lines of the application as part of an accounting transaction.
Application Fundamentals: Entry Event Process Definition Page	EE_PROCESS_STEP	View a predefined series of steps that are grouped by a process for similar processing.
Application Fundamentals: Accounting Entry Definition Page	JRNL_GEN_ACCTG_DEF	Identify the system source that distributes data to the general ledger. Identify the record and field names for the Accounting Entry table.
Entry Event Budget Page	PST_EE_RUN_REQUEST	Run the Project Costing Budget Entry Event Processor to generate standard accounting entries based on the entry event code on the project budget.
Entry Event Budget Accounting Entries Page	EE_PCBUD_DRILL	Drill into PeopleSoft Project Costing source data from a journal entry.

Understanding Project Budgeting with Entry Events

Entry events enable applications to create standard accounting entries automatically based on accounting lines that are generated by document posting routines. If the Commitment Control ledger on the detailed budget row is enabled for entry events, you can assign an entry event code to the budget row. After the Journal Generator Application Engine process (FS_JGEN) successfully posts the budget rows to the general ledger, you can use the Project Costing Budget Entry Event Processor (PC_TO_EE) to generate additional standard accounting entries based on the entry event code. The additional journal entries are posted to the general ledger for you to use to track transactions within the Commitment Control ledger.

Project Budgeting with Entry Events Process Flow

The diagrams in theIntegration Process Flow topic shows the processing flow for the Project Costing to Commitment Control process.

The following diagram shows a high-level process flow of using entry events in project budgeting, which begins after the Project Costing to Commitment Control process successfully posts budget rows to the Commitment Control ledger data table (LEDGER_KK), part 1:

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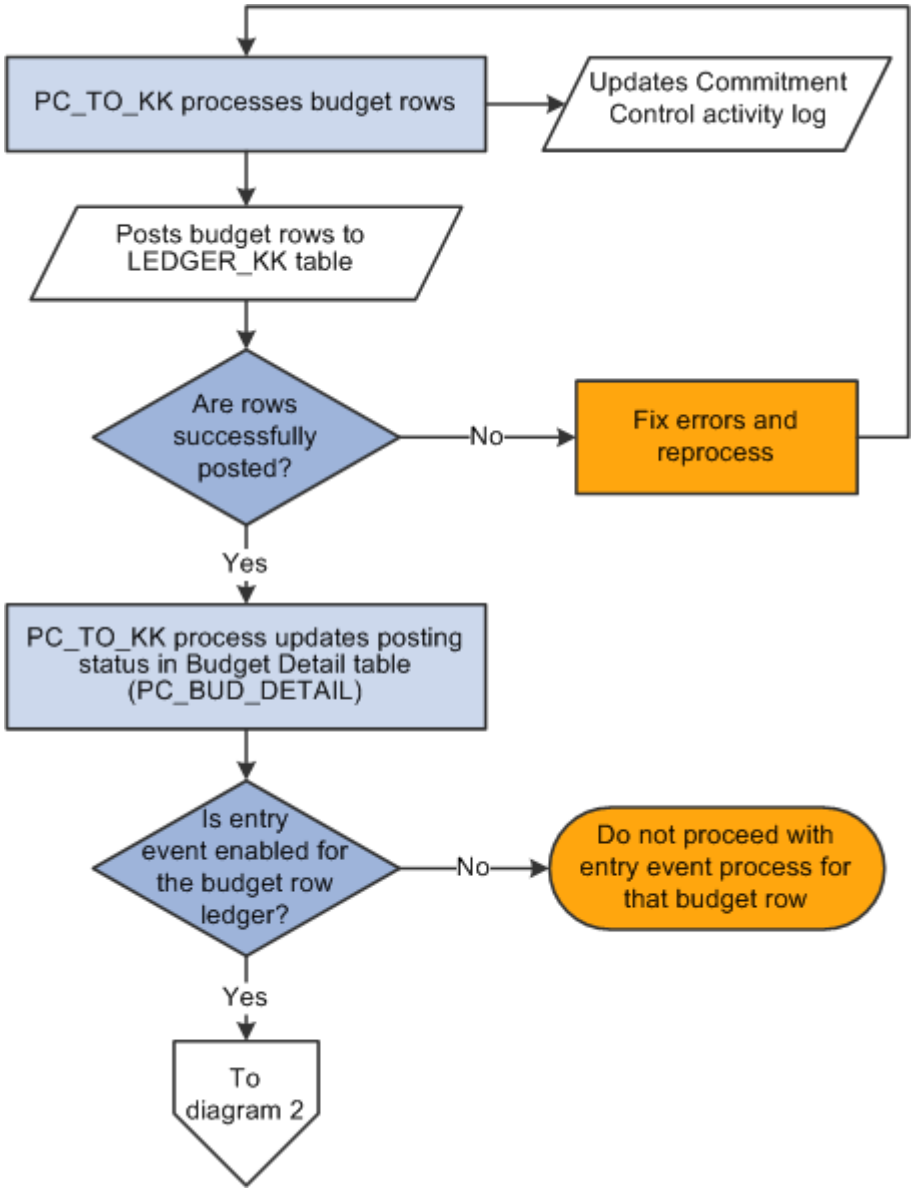

The following diagram shows a high-level process flow of using entry events in project budgeting, which begins after the Project Costing to Commitment Control process successfully posts budget rows to the Commitment Control ledger data table (LEDGER_KK), part 2:

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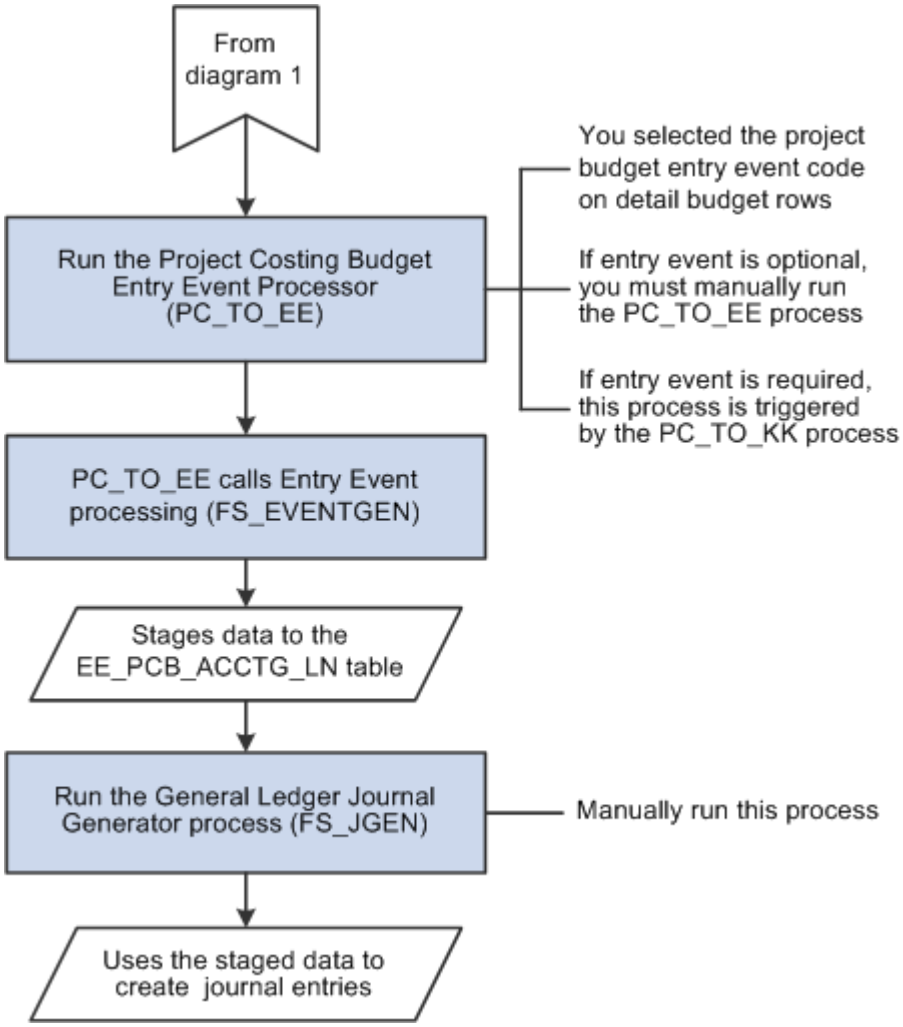

PeopleSoft Project Costing Budget Entry Event Processor

The Project Costing Budget Entry Event Processor uses the Entry Event Generator Application Engine process (FS_EVENTGEN) to process PeopleSoft Project Costing budget transactions and generate supplemental accounting entries. You can run the Project Costing Budget Entry Event Processor by using either of these two methods:

- Finalize a budget plan, which triggers the Project Costing to Commitment Control budget posting process.

  After budgets are successfully posted to the general ledger, the final step in the Project Costing to Commitment Control process is to call the Project Costing Budget Entry Event Processor.

  Use this method if entry events are specified as either required or optional for General Ledger on the Installation Options - Entry Event page and required for the Commitment Control ledger group on the Ledgers For A Unit - Commitment Control Options page.

- Manually run the Project Costing Budget Entry Event Processor on the Entry Event Budgets run control page in PeopleSoft Project Costing to reprocess budget entry events.

  Use this method if entry events are specified as either required or optional for General Ledger on the Installation Options - Entry Event page and optional for the Commitment

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Control ledger group on the Ledgers For A Unit - Commitment Control Options page, or if the system fails to generate the entry event journal entries.

The Project Costing Budget Entry Event Processor applies only to budget transactions, not to actual cost transactions.

Entry Event System Data

These definitions are delivered with the PeopleSoft Project Costing system for use with project budgets:

Definition Type	System Data
Entry Event source	PC_BUDGET **Note:** Do not modify the entry event source transaction definition.
Entry Event process	PCBUDG with process steps PC_CHD and PC_PAR **Note:** A process step must be defined for each ledger and ledger group combination that you will use in project budgeting.
Accounting entry	EGPCBDEFN for SetID SHARE
Entry Event code	PCBUD1 for both SetID SHARE and FEDRL **Note:** Entry Event code PCBUD1 uses the PCBUDG Entry Event process definition.
Journal Generator template	EE_PCBUD for SetID SHARE

See PeopleSoft Commitment Control: Setting Up Commitment Control for a Business Unit and GL Ledger Group.

Entry Event Code on Budget Detail Rows

When you create project budgets, you will select the entry event codes that are applicable for PeopleSoft Project Costing budget rows on the Commitment Control Detail tab of the Project Budget Items - Adjust Budget Items page. After the budget plan is saved and finalized, and the project budget is successfully posted, the Entry Event Generator process can create additional accounting entries. If you select an inactive entry event code and try to finalize the budget, the system will not proceed with the finalization process. A message appears on the Review Commitment Control page in the Error column for the corresponding budget detail row indicating that the row contains an invalid value. You must change the event entry code and refinalize the budget plan.

See Project Budget Items - Adjust Budget Items Page.

Drill Down to Source Data

After the Project Costing Budget Entry Event Processor generates supplemental accounting entries and the Journal Generator successfully generates the actual journals based on those accounting entries, you can drill down from the actual journal to PeopleSoft Project Costing source data.

Prerequisite

To use the feature of drilling down to source data, you must enable entry events for Commitment Control ledger groups for applicable business units on the Ledgers For A Unit - Commitment Control Options page.

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See PeopleSoft Commitment Control: Setting Up Commitment Control for a Business Unit and GL Ledger Group.

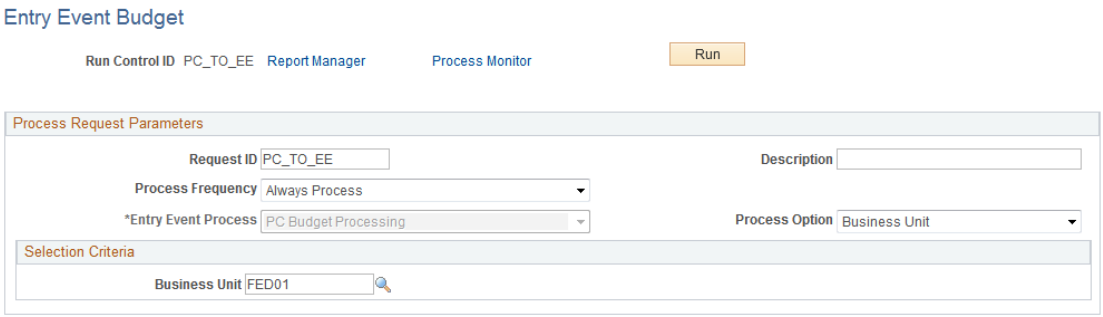
Entry Event Budget Page

Use the Entry Event Budget page (PST_EE_RUN_REQUEST) to run the Project Costing Budget Entry Event Processor to generate standard accounting entries based on the entry event code on the project budget.

Navigation:

Project Costing, and then **Budgeting**, and then **Entry Event Budget**, and then **Entry Event Budget**

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



Enter a request ID and description, and select the process frequency.

Select from these process options and enter the criteria that the system uses to select transactions to process:

- All Business Units
- BU (business unit)/Project
- BU/Project/Plan (budget plan)
- BU/Project/Plan/Activity
- BU/Project/Plan/Activity/Trans (transaction)
- Business Unit

Entry Event Budget Accounting Entries Page

Use the Entry Event Budget Accounting Entries page (EE_PCBUD_DRILL) to drill into PeopleSoft Project Costing source data from a journal entry.

Navigation:

Project Costing, and then **Budgeting**, and then **Entry Event Budget Drill Down**, and then **Entry Event Budget Accounting Entries**

This example illustrates the fields and controls on the Entry Event Budget Accounting Entries page. You can find definitions for the fields and controls later on this page.

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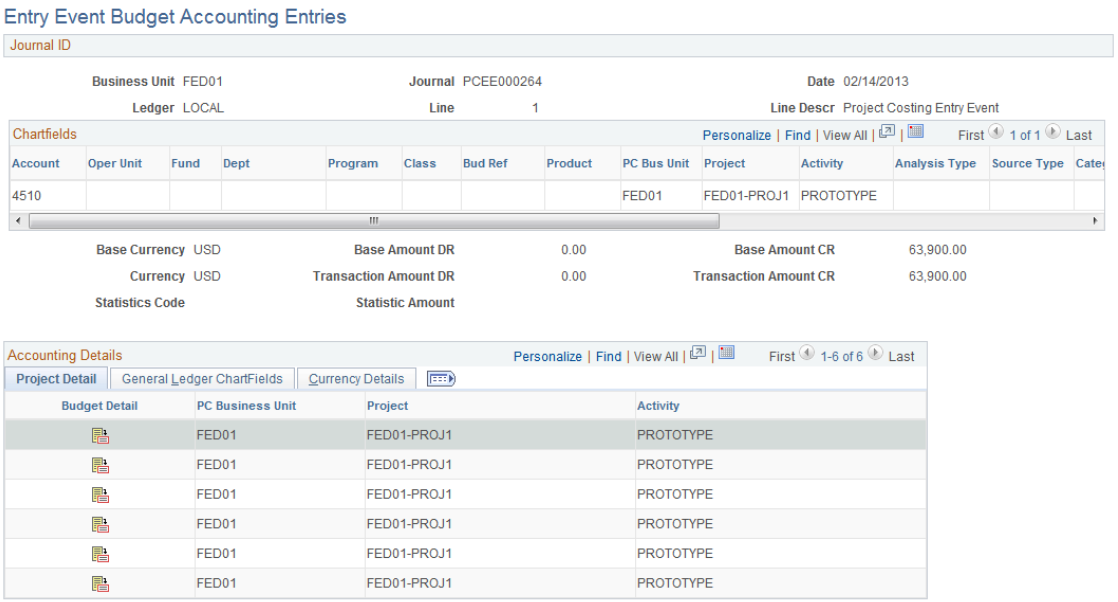

Enter the business unit on the Entry Event Budget Drill Down search page and optionally search for a journal by journal ID, date, GL journal line number, and ledger. The Entry Event Budget Accounting Entries page appears for you to view a list of accounting entries for the journal ID. Only transactions that are created by the Project Costing Budget Entry Event Processor appear on this page.

Field or Control	Description
	Click the **Budget Detail** icon to drill down to the source transaction on the Budget Detail page.

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Pricing Project Costs

Understanding the Pricing Process

This topic discusses:

- The pricing process.
- Installation and business unit pricing options.
- Rate sets.
- Rate plans.
- Contract-specific and standard rates.
- Effective-dated rate definitions.
- Transactions eligible for pricing and repricing.
- Tiered pricing.
- Organizational sharing.
- Limits processing.
- Pricing transactions associated with work orders.
- Pricing projects from proposals.

The Pricing Process

The Pricing Application Engine process (PC_PRICING) calculates transaction costs, overhead, and billing amounts from source rows, which are transactions that are brought into PeopleSoft Project Costing. On some projects, billing transactions will also be used for revenue. However, you can create revenue rows separate from billing rows using rate sets with a rate definition type of revenue. This enables you to run the Pricing process independently for direct and indirect costs, billing, and revenue. Source rows can be directly entered into PeopleSoft Project Costing by using the Add Transactions component, or entered into a feeder system, such as PeopleSoft Expenses, and integrated into Project Costing.

Application Engine processes that bring cost transactions into PeopleSoft Project Costing automatically trigger the Pricing process. Adding transactions on the Add Transactions page also triggers the Pricing process. The process matches the costs with rate sets that specify what target rows to create in the Project Transaction table (PROJ_RESOURCE). Target rows are transactions that are created as a result of pricing the source transaction row. The process uses the rate plan to determine which rate sets to run and in what sequence to run them.

If you use tiered pricing, the system generates billing rows based on the specified rate set or rate plan, and applies the tiered pricing adjustment percentage to the amount on the target row. If you use organizational sharing and define sharing options and rates, the Pricing process creates sharing rows based on the established rates and exceptions.

Transactions are eligible to price for billing and revenue when the project and activity are linked to a rate set or rate plan through PeopleSoft Contracts at the contract line level. For example,

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assume that a voucher is entered in PeopleSoft Payables for 100 USD. When the Payables to Project Costing Application Engine process (PC_AP_TO_PC) runs, it selects the cost row from the Payables Accounting Entries table (VCHR_ACCTG_LINE) and calls the Pricing process, which creates a billing row from the cost row. When the process completes, two rows appear in the Project Transaction table, a row with an analysis type of ACT (actual cost) and a row with an analysis type of BIL (billable amount), as shown in this table:

Description	Source	Analysis Type	Amount
Materials	Payables	ACT	100 USD
Markup 25 percent	Pricing process	BIL	125 USD

In this example, analysis type BIL is used for both billing and revenue. If billing and revenue were separated on the related contract, then an additional row with analysis type REV would be created using the markup defined for revenue rather than the markup used for billing.

You can also use the Pricing process to cost project transactions that will not be billed. This is made possible by associating a rate set with an activity on the Activity Definitions - Rates page in PeopleSoft Project Costing. As project-related costs are incurred and sent to PeopleSoft Project Costing, the system can determine transaction costs that are associated with the activity based on the rates in the rate set or rate plan. Instead of linking the project and activity to a contract line and rate set in PeopleSoft Contracts for billing purposes, you can link the project and activity to a rate set in PeopleSoft Project Costing for costing purposes.

Additionally, you can use the Pricing process to price unpriced transaction rows or reprice transaction rows that are in the Project Transaction table. You cannot, however, reprice transactions that are in the process of being billed or sent to the general ledger (GL), or that were generated from the same source transaction as another billable row that is in the process of being billed or sent to GL.

Creating Cost, Billing, and Revenue Transactions Using the Pricing Process

The high-level steps that you follow to create cost, billing, and revenue transactions by using the Pricing process are:

1. Determine the elements that contribute to pricing calculations based on your business processes.

   For example, do you use rates by employee, project role, or job code? Do you mark up source transaction amounts to create billing rows, or do you use fixed amounts? Do you associate rate sets with project types, projects, activities, or specific contract lines?
2. Set up installation and business unit options.
3. (Optional) Set up tiered pricing.
4. (Optional) Set up rules and exceptions for organizational sharing.
5. (Optional) Define and populate custom rates.
6. Create rate sets.
7. Create rate plans.
8. Associate projects and activities with rate sets or rate plans and contracts.
9. Price the transactions to create cost, billing, and revenue rows by using feeder systems to automatically trigger the Pricing process.
10. Review the transactions, make changes to rates, and manually run the Pricing process to reprice rows as necessary.

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Related Topics

- Activity Definitions - Rates Page
  Use the Activity Definitions - Rates page (ACTIVITY_SERVICES) to enter and view billing and project costing rates that are associated with an activity.
- Understanding Integration with PeopleSoft Contracts and PeopleSoft Billing
  PeopleSoft Project Costing works with PeopleSoft Contracts to generate project-related customer billing. This is called rate-based project billing. For rate-based billing, PeopleSoft Contracts pulls information from project transactions and populates the PeopleSoft Billing interface tables with the billing information.
- Understanding the Billing Process Flow
  The subsequent billing cycle diagram shows the flow of the billing process for rate-based contract lines. The numbered steps that are on the diagram correspond to updates that occur to these tables:
- Understanding Data Originating from PeopleSoft Project Costing (PBI System Source)
  This table shows the life cycle of project transaction rows that are eligible for billing. This table starts after the transaction is priced:
- Moving Costs and Revenue Data into PeopleSoft Project Costing
- Defining Accounting Rules
  To define accounting rules, use the Accounting Rules component (PSA_ACCT_SETUP). Use the PSA_ACCT_SETUP_CI component interface to load data into the tables for this component.
- PeopleSoft Contracts: Accounting Distributions

Understanding Installation and Business Unit Pricing Options

During installation, determine if you want to enable organizational sharing for rate-based contract lines. Other pricing options at the installation level are used when the Pricing process is triggered for the business unit by Application Engine processes from feeder systems, or through the Add Transactions functionality in PeopleSoft Project Costing. For example, because the rates that the Pricing process uses are effective-dated, you can specify the date type (transaction or accounting) that the system uses to determine the rate set or rate plan to use for pricing.

Options that you select at the business unit level are also used when the Pricing process is triggered for the business unit by Application Engine processes from feeder systems, or through the Add Transactions functionality in PeopleSoft Project Costing. Select pricing options of **Cost, Billing**, and**Revenue** for the system to use to determine which rows to create. By using pricing options, you can tell the system to create costs (indirect and direct), billing, and revenue recognition rows separately. The pricing options that you select for the business unit appear by default as the selected pricing options on the Pricing run control page. You can override the business unit default values when you initiate the Pricing process on the Pricing run control page.

Cost and Bill Rate Restrictions in Program Management

If you use PeopleSoft Program Management, at the business unit level you can restrict the rate types that users can select for cost and bill rates for activity resources. The rate types that you enable for the business unit control the rate options that you can select on the Rate Sets - Target page as follows:

- If you enable only the **Rates by Employee** rate type for the business unit, you cannot select the JBI (Job Code Bill Rate), JCO (Job Code Cost Rate), RBI (Role Bill Rate), RCO (Role Cost Rate), CRB (Custom Bill Rate). or CRC (Custom Cost Rate) rate options.

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- If you enable only the **Rates by Job Code** rate type for the business unit, you cannot select the EBI (Employee Bill Rate), ECO (Employee Cost Rate), RBI, RCO, CRB, or CRC rate options.
- If you enable only the **Rates by Role** rate type for the business unit, you cannot select the EBI, ECO, JBI, JCO, CRB, or CRC rate options.
- If you enable only the **Override** rate type for the business unit, you cannot select the EBI, ECO, JBI, JCO, RBI, RCO, CRB, or CRC rate options.
- If you enable only the **Custom** rate type for the business unit, you cannot select the EBI, ECO, JBI, JCO, RBI, or RCO rate options.

Rates for revenue may be entered into the rate set as a percentage of one of the options listed above or directly into the rate setup amount field.

Rate Sets

A rate set enables you to create transaction rows when costing, billing, recognizing revenue, or reporting from incoming or existing transactions in the Project Transaction table. Rate sets have two parts:

- The source criteria that the Pricing process uses to compare against cost transactions coming in from feeder systems.
- The target definition of the cost, billing, or revenue recognition row that the Pricing process creates.

  When an incoming cost transaction matches the source criteria, the Pricing process creates a new transaction row for every target row that is defined on the rate set.

For example, you can use multiple criteria on the source page to create billing rows one way for rows with a source type of *MATER* (material) and another way for a source type of *LABOR.* The materials can be billed at cost, while the labor is marked up. The billing rows are defined by the target definition (bill MATER rows at cost, mark up LABOR rows using employee rates) and the project ChartFields. Additionally, revenue can be recognized using different markups than those used for billing.

A one-to-many relationship exists between source criteria and target row definitions. One source row, such as a cost transaction or a billing transaction, can create multiple target rows.

You can attach rate sets or rate plans to:

- Project types

  The system uses the rate set or rate plan that you specify for a project type as the default rate set or rate plan for new projects that you create for that type. You can override the default rate set or rate plan at the project level.
- Products

  If you associate a rate plan with a product, the system uses the product's rate plan for the contract line on the Contracts Related Projects page.
- Contract lines

  Rate sets and rate plans can be defined for general use or for a specific contract. Once defined, you can assign the rate set or rate plan to the rate-based contract using the Related Projects page.
- Projects

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The system uses the rate set or rate plan on the project as the default rate set or rate plan for new activities that you create for that project. You can override the default rate set or rate plan at the activity level.

- Activities

  The actual Pricing process occurs at the activity level. The association of a rate set or rate plan to an activity is effective-dated.

Rate Definition Types

You specify a rate definition type when you create a rate set. By using rate definition types, the Pricing process can create costs (indirect and direct), price transactions for billing, and price transactions for revenue recognition. Rate definition types control the type of rows that the Pricing process creates by restricting the analysis types that you can select for target rows on the rate set.

For example, when you create a rate set with a cost rate definition type, the system restricts the target rows to analysis types that belong to the actual cost analysis group. The default actual cost analysis group is PSCST (Accounting Costs), which is specified on the Installation Options - Project Costing page along with the actual revenue and billing analysis groups. During implementation you can override the default analysis groups for actual cost, revenue, and billing.

This table lists the rate definition types and analysis types that you can select for target rows:

Rate Definition Type	Target Row Analysis Types
Billing	For target rows, you can select analysis types that belong to the PSWKS (Billing Worksheet Grouping) analysis group.
Cost	For target rows, you can select analysis types that belong to the analysis group that is specified in the **Actual Cost** field on the Installation Options - Project Costing page. The default analysis group is PSCST (Accounting Costs). **Note:** You can enable variance pricing on rate sets with a cost or cost/billing rate definition type.
Cost/Billing	For target rows, you can select analysis types that belong to either: • The PSWKS (Billing Worksheet Grouping) analysis group. • The analysis group that is specified in the Actual Cost field on the Installation Options - Project Costing page. **Note:** You can enable variance pricing on rate sets with a cost or cost/billing rate definition type.
Revenue	For target rows, you can select analysis types that belong to the PSRV2 analysis group.

Rate Set Category

Rate set categories are optional. Rate set categories are used to group related rate sets for the Variance Pricing process. If *Rate Set Category* is selected in the **Rate Processing Option** field on the Variance Pricing run control page, then all rate sets tat are part of that rate set category

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and have the **Enable Variance** check box selected are selected by the Variance Pricing process.

Rate Options

Rate options specify how the Pricing process calculates the rates for the corresponding target rows. For example, you can select a rate option of *ECO* (Employee Cost Rate) on a target row to use the cost rates that are defined for the employee on the Rates by Employee page. For the *ECO* rate option, the Pricing process calculates the target amount as the source row transaction quantity × the employee-specific cost rate × the rate set rate amount.

Each rate option is associated with a specific formula that the system uses to calculate the target amount. In the previous example, the source row transaction quantity is the quantity available in the Project Transaction table for the specific row that is being priced. The employee-specific cost rate is the rate that is defined for the employee on the Rates by Employee page. The rate amount on the target row functions as a multiplier for any rate option except the *FIX* (Fixed Amount) rate option. If you select the *FIX* rate option, the rate amount functions as the actual rate.

These factors affect the list of rate options that are available for selection:

- Some rate options are available only if you integrate with other PeopleSoft applications.

  For example, if you use PeopleSoft Maintenance Management, you can select the *WBI* (Work Order Labor Bill Rate) and *WCO* (Work Order Labor Cost Rate) rate options to use the work order labor bill and cost rates. If you use PeopleSoft Program Management, you can select the *ABI* (Activity Resource Bill Rate) and *ACO* (Activity Resource Cost Rate) rate options to use the activity resource labor rates that appear on the PeopleSoft Program Management Resources by Activity page. If you use PeopleSoft Proposal Management, you can select the *AML* (Mark Up/Down Labor) and *AMN* (Mark Up/Down Nonlabor) rate options to use the signed percentage amount in the **Labor %** and **Non-Labor %** fields on the Project Definitions - Rates page to determine the markup or markdown value.
- If you use PeopleSoft Program Management, the available rate options are also based on the rate types that you specify for the business unit during implementation.

  For example, if you restrict cost and bill rate types at the business unit level to only rates by employee, you cannot select the JBI, JCO, RBI, and RCO rate options.

A complete list of rate options that are available for selection on the Rate Sets - Target Page.

Rate Plans

A rate plan is a collection of rate sets that the system executes in a specified order. Use rate plans to link rate sets so that priced rows from one rate set are used to create additional priced rows from the next rate set. For example, you can add additional expenses, such as administrative costs or overhead, to cost transactions before they are priced for billing or revenue.

The Pricing process uses the rate plan to determine which rate sets to run and in what sequence to run them. When setting up the rate plan, you can assign rate sets in any combination of rate definition types: billing, costing, cost/billing, and revenue. You can assign the same rate set to multiple rate plans.

Rate plans are similar to rate sets in these ways:

- Both can be associated with project types, projects, activities, or contract lines.
- Both are effective-dated.

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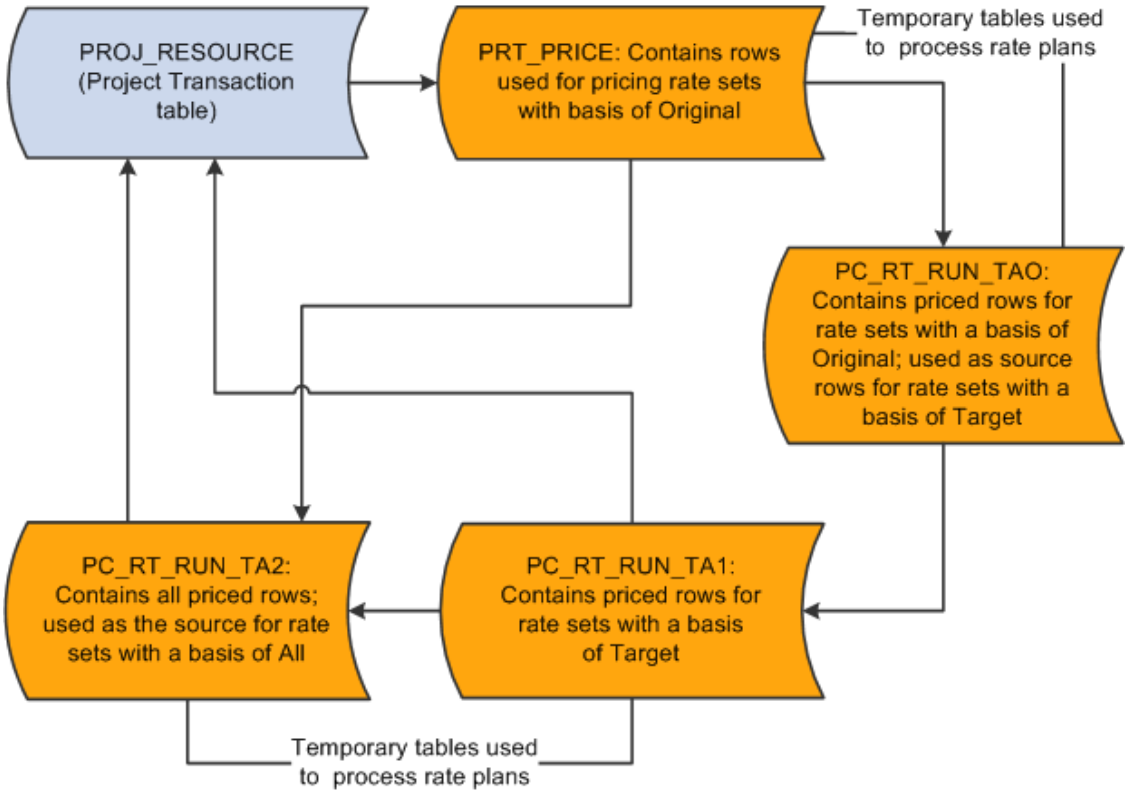
- If either a rate set or a rate plan is associated with a project type, it is used as the default rate set or plan for new projects that you create for that type.
- If either a rate set or a rate plan is associated with a project, it is used as the default rate set or plan for new activities that you create for that project.

This diagram shows the tables that the system uses to process rate plans:



Source rows that enter PeopleSoft Project Costing from feeder systems are stored in a Project Transaction subrecord (PROJ_RES_TMP) and copied into the PRT_PRICE temporary table.

Basis

A *basis* is assigned to each rate set in a rate plan and tells the Pricing process what transactions to use to create the target rows for a rate set.

Basis options are:

- *Original:* The system uses the original source transactions to create target rows for the specified rate set.
- *Target:* The system uses the target rows that have been created on this rate plan thus far as the basis for creating the target rows for this rate set.
- *All:* The system uses all of the original sources and all of the previously created target rows on the rate plan to create the target rows for this rate set.

Sequence

When transactions come into PeopleSoft Project Costing from PeopleSoft feeder systems, the Pricing process uses the pricing options that you select for the business unit to tell the system what kind of rows to create from the source transactions. The pricing options correspond to the

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rate definition types (Billing, Cost, Cost/Billing, or Revenue) that are assigned to rate sets. You can process all rate sets on a rate plan even if the rate sets contain different rate definition types, or you can process a subset of rate sets on a rate plan. When the Pricing process runs for a rate plan, the rate sets are processed for the selected pricing options in the sequence that is defined on the rate plan.

For example, assume that you create a rate plan and attach rate sets to the plan in the order of COST1, BILL1, COST2, BILL2, and REV1. When you run the Pricing process for all three pricing options (Cost, Billing, and Revenue), the system first processes the COST1 rate set, followed by BILL1, COST2, BILL2, and REV1. Because of this processing logic, you should add rate sets to rate plans in the order in which you want them to run.

If you run the Pricing process by using the Pricing run control page, you specify the rate sets to process by selecting pricing options (Cost, Billing, and Revenue) on the run control page. The rate sets are processed in the order that is defined on the rate plan, based on the pricing options that you selected on the run control page.

Example of Using Rate Sets and Rate Plans to Price Transactions

This diagram shows an example of pricing inbound transactions from PeopleSoft Expenses to PeopleSoft Project Costing:

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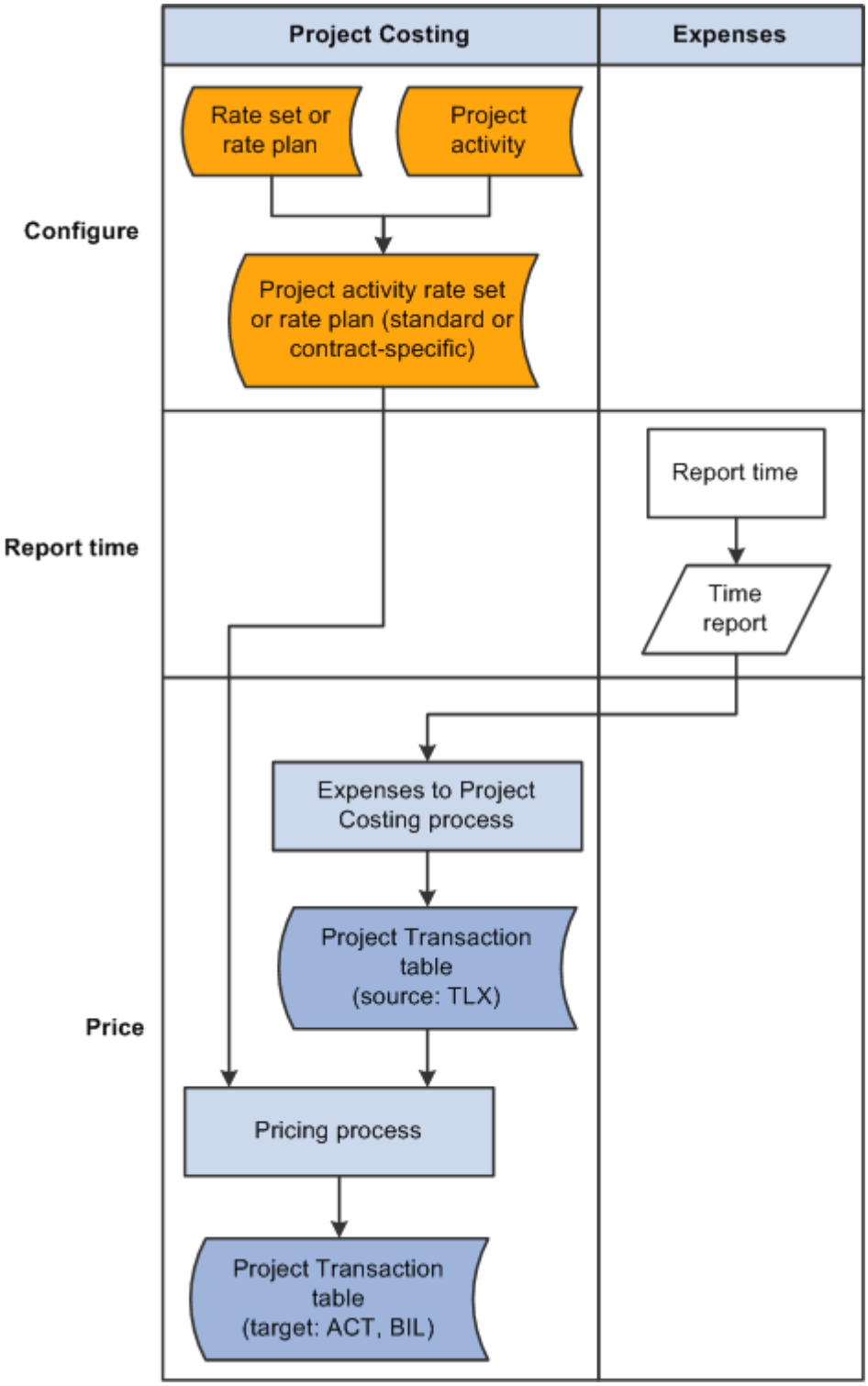

As an example of using rate sets on a rate plan to price incoming transactions from time reports in PeopleSoft Expenses, assume that you set up two rate sets. The first rate set has a cost rate definition type and uses incoming time report transactions (rows with a TLX analysis type) to create actual cost transactions (rows with an ACT analysis type) by using the ECO rate option. The ECO rate option multiplies the source row transaction quantity × the employee-specific cost rate × the target row rate amount.

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The second rate set has a billing rate definition type and uses the same incoming time report transactions as source rows to create billing transactions (rows with a BIL analysis type) by using the EBI rate option. The EBI rate option multiplies the source row transaction quantity × the employee-specific bill rate × the target row rate amount.

Now set up a rate plan that contains both rate sets. Both rate sets use the original, incoming time report transactions as source rows. After the rate plan processes the rate sets, the Project Transaction table will contain cost transaction rows with an analysis type of ACT, and billing transaction rows with an analysis type of BIL. The transaction amounts on these rows are based on the rate option on the rate set that was current at the time that you ran the Pricing process.

Contract-Specific and Standard Rates

In PeopleSoft Project Costing, you can create rate sets and rate plans that are either contract-specific or standard (general). You can link contract lines to contract-specific or standard rate sets or rate plans. A contract-specific rate plan can contain both standard and contract-specific rate sets. A standard rate plan can contain standard rate sets only.

This table lists the valid combinations of standard and contract-specific rate sets and rate plans that you can attach to activities and contract lines:

Attach at the Activity Level	Attach at the Contract Line Level
Standard rate set	If you attach a standard rate plan to an activity, you cannot attach this activity to a contract line.
Standard rate plan	Contract-specific rate set.
Nothing	Standard rate set.
Nothing	Standard rate plan.
Nothing	Contract-specific rate set.
Nothing	Contract-specific rate plan.

You can link an activity that has a rate plan to a contract line. If the contract line is linked to a rate set or contract rates, the system processes the contract line rate set first, followed by the activity rate plan. Thus you can use the resulting target rows from the contract line rate set as source rows for the activity rate plan. Alternatively, you can process the contract line rate set independently of the activity rate plan.

Example of Using Contract-Specific Rate Sets and Activity-Specific Rate Plans

As an example of using a contract line-specific rate set and an activity rate plan, assume that you set up a contract line-specific rate set to create billing rows from time entries for an activity. You also set up an activity rate plan that contains a standard rate set to create indirect labor costs for the project.

The contract line-specific rate set is associated with the contract line on the Related Projects page in PeopleSoft Contracts. This rate set has a billing rate definition type and uses incoming time report transactions to create billing transactions (rows with a BIL analysis type). On the Rate Sets - Target page, the rate option is AMT and the rate set-specific rate amount is 150 USD. The activity is associated with the contract line on the Related Projects page in the PeopleSoft Contracts system. After you enter a time report transaction of 8 work hours for the activity, the Pricing process uses the rate option and rate amount specified on the contract-specific rate set to calculate the target billing transactions (rows with a BIL analysis type) from each incoming time report transaction.

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This activity is also associated with a standard rate plan on the Activity Definitions - Rates page. The rate plan contains a standard rate set with a cost rate definition type and a basis of original, which means that the Pricing process uses only the original time entry rows that you import from PeopleSoft Expenses to calculate the target rows. The rate set uses a rate option of ECO, which is the cost rate that is associated with the employee (105 USD in this example), plus a 15 percent markup, to calculate actual overhead cost transactions (rows with an ACT analysis type) from each incoming time report transaction.

This table lists the resulting rows in the Project Transaction table for this example:

Description	Source	Quantity	Analysis Type	Rate Amount	Transaction Amount
Original transaction.	Time report transaction	8 work hours	TLX	Not applicable	Not applicable
Target billing row based on the contract line rate set.	Pricing process	8 work hours	BIL	150 USD	1,200 USD (calculated as 8 hours × 150 USD)
Target cost row based on the activity rate plan.	Pricing process	8 work hours	ACT	1.15	966 USD (calculated as 8 work hours × 1.15 rate amount × 105 USD employee cost rate)

Effective-Dated Rate Definitions

You assign an effective date to each rate set and rate plan. This action enables you to not only maintain a set of current rate sets and rate plans, but also to set up rate sets and rate plans for anticipated future use, and adjust transactions by using past-dated rate sets and rate plans.

The Pricing process uses the following date criteria to determine which rows are eligible for pricing:

- The date type (transaction or accounting) that you specify during implementation.
- The effective date of the rate set or plan.
- The effective date of the association of the rate set or plan to the activity.

Date Type

You select the transaction or accounting date option in the **Pricing/Funds Distribution** group box on the Installation Options - Project Costing Integration page.

If you specify the accounting date type, the Pricing process determines the eligible rows by matching the accounting date for each transaction row to the effective date range of the rate set or plan. Alternatively, you can specify the transaction date type for the Pricing process to select rows with a transaction date that matches the effective date range of the rate set or plan.

Effective Date of the Rate Set or Plan

You can price transactions by using a rate set or plan that is no longer current if the rate set or plan is in an active status. In other words, a rate set or plan can contain more than one active, effective-dated row. You establish the effective date when you set up a rate set on the Rate Sets page or set up a rate plan on the Rate Plans page.

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Effective Date of Association of the Rate Set or Plan to the Activity

The association of a rate set or rate plan to an activity is effective-dated. The system will not price a row if the row's specified date type (accounting or transaction) is earlier than the effective date of the association of the rate set or plan to the activity. You establish this effective date on the Activity Definitions - Rates page when you use the page to associate the rate set or plan to the activity.

Example of Using Effective-Dated Rate Sets

Assume that you set up a rate set with two active effective dated rows, as shown in this table:

Effective Date	Source Analysis Type	Target Rate Option	Target Rate Amount	Target Analysis Type
January 1, 2004	TLX (incoming time report)	AMT (quantity × target rate)	25.00 USD	ACT (actual cost transaction)
January 1, 2005	TLX	AMT	50.00 USD	ACT

The rate set has an effective date of January 1, 2004, and uses incoming time report transactions as source rows. The Pricing process multiplies the time report quantities by a target rate of 25.00 USD to create actual cost transactions from source rows that have an accounting date that occurs between January 1 and December 31, 2004. On January 1, 2005, the target rate increases to 50.00 USD.

Assume that you create the following two source transaction rows:

1. The first transaction has a transaction date, accounting date, and currency effective date of April 1, 2004. The transaction quantity is 8, which is measured in work hours (MHR).
2. The second transaction also has a quantity and unit of measure of 8 MHR. The transaction date, accounting date, and currency effective date are June 1, 2005.

Now you run the Pricing process, which uses a target rate of 25.00 USD to calculate the first target row based on the rate set with an effective date of January 1, 2004. The process uses the new target rate of 50.00 USD to calculate the second target row based on the rate set with an effective date of January 1, 2005.

This table lists the target rows that the Pricing process creates for the two source transaction rows:

Accounting Date	Project	Activity	Quantity	Rate Amount	Analysis Type	Transaction Amount
April 1, 2004	PROJ1	ACT1	8 MHR		TLX	
April 1, 2004	PROJ1	ACT1	8 MHR	25.00 USD	ACT	200.00 USD
June 1, 2005	PROJ1	ACT1	8 MHR		TLX	
June 1, 2005	PROJ1	ACT1	8 MHR	50.00 USD	ACT	400.00 USD

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Transactions Eligible for Pricing and Repricing

The Pricing process uses not only effective date of rate definitions, but also distribution statuses and system sources to identify transactions that are eligible for processing.

Distribution Statuses

These distribution status fields in the Project Transaction table support rate set and rate plan processing:

- Cost distribution status (CST_DISTRIB_STATUS): Indicates if a source row has been priced for costing.
- Billing distribution status (BI_DISTRIB_STATUS): Indicates if a source row has been priced for billing.
- Revenue distribution status (REV_DISTRIB_STATUS): Indicates if a source row has been priced for revenue recognition.
- General ledger distribution status (GL_DISTRIB_STATUS): Indicates if a transaction row has been interfaced to the general ledger.

  Repricing cannot occur on a source row if any target transaction rows have been further processed downstream. If a source row results in multiple target rows, and any of the target rows have been sent to PeopleSoft Billing or PeopleSoft General Ledger, neither row can be repriced. For example, assume that a rate plan specifies that an incoming transaction from PeopleSoft Expenses (with a TLX analysis type) is the source row that will create two rows—a cost row (with a CST analysis type) and a bill row (with a BIL analysis type). If the BIL row has already been sent to PeopleSoft Billing, the system cannot reprice the TLX row, which means that the cost cannot be recalculated.

Transaction rows must have a distribution status of *N* (new or not distributed) to be included in the Pricing process. To process a transaction row for a cost rate definition type, the cost distribution status must be *N* for the row. To process a row for a billing rate definition type, the billing distribution status must be *N.* Similarly, to process a row for a revenue rate definition type, the revenue distribution status must be *N.*

The possible cost, billing, and revenue distribution status values are:

- *C:* Created (cost and revenue rows only).
- *D:* Distributed; done.
- *G:* Generated (cost and revenue rows only).
- *I:* Ignore; do not process.
- *N:* New; not distributed.
- *P:* Priced (billing rows only).
- *U:* Unbillable/nonbillable (billing rows only).
- *W:* Worksheet, billing calculations are in the Project Costing Billing Worksheet (billing rows only).

For projects assigned to contracts that separate billing and revenue, the billing distribution status indicates if a transaction row has been priced for billing, and the revenue distribution status indicates if the row has been priced for revenue. These statuses enable you to separately monitor pricing for billing and revenue.

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> **Note**
>
> The Process Project Accounting Application Engine process (PSA_ACCTGGL) assigns the *G* status value to the **GL Distribution Status** field (GL_DISTRIB_STATUS) for rows that are associated with contracts revenue. The Contracts Load Update Application Engine process (CA_LOAD_UPD) updates the GL Distribution Status value to *D* for these rows in the Project Transaction table.

System Sources

The Pricing process uses these system sources, in combination with distribution statuses, to identify transactions that are eligible for processing:

- PRP: Indicates that a transaction is priced for billing.
- PRC: Indicates that a transaction is priced for costing.
- PRR: Indicates that a transaction is priced for revenue.

Repricing

Similar to the Pricing process, the Repricing process considers the pricing options that you select on the Pricing run control page.

You can reprice transactions that:

- Have not been billed or sent to GL.

  A source row is ineligible for repricing if any of its target transaction rows contain a billing distribution status of *W* or *D,* or a GL distribution status of *D* or *G.*
- Are not linked to an asset.
- Have not been sent to PeopleSoft Asset Management.
- Have not been used for fee calculations (billing and revenue fee worksheets) in PeopleSoft Contracts.

  This rule applies only to government contracts. A transaction with a Contract Fee Status (CA_FEE_STATUS) field value of *Generated* indicates that it has been used in a fee calculation.
- Are not created by the Variance Pricing Application Engine process (PC_VAR_PRICE).

  Repricing cannot occur on any transaction rows that are created as a result of the Variance Pricing process.

You can view the distribution statuses of the source transaction row on the Transaction Detail page.

Related Topics

- Transaction Detail Page
  Use the Transaction Detail page (PROJ_EXPR_ENTRY_PG) to maintain detailed information on a specified transaction.

Tiered Pricing

Tiered pricing enables you to adjust the rate that the system applies to cost transactions during the Pricing process based on quantities that accumulate against a contract line. This type of pricing applies to rate-based, contract line processing only.

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Tiered pricing requires the use of transaction identifiers, which are similar in concept to using analysis groups. Transaction identifiers provide users with the flexibility to identify and group project ChartField values and eliminate the need to identify the ChartField values each time they define tiered pricing for a new contract line.

> **Note**
>
> To implement tiered pricing, you must install PeopleSoft Contracts. Contracts with a Government classification and transactions created from Variance Pricing are not eligible for tiered pricing.

Related Topics

- PeopleSoft Contracts: Understanding Pricing Contracts
- PeopleSoft Contracts: Pricing Amount-Based Contracts
- PeopleSoft Contracts: Pricing Rate-Based Contracts
- PeopleSoft Contracts: Using Special Payment Terms
- PeopleSoft Contracts: Tiered Pricing

Organizational Sharing

Use organizational sharing to share costs and revenue between the organization that owns the transaction and the organization that owns the project or activity.

If sharing rules are defined and activated, the Pricing process calls the Sharing Application Engine process (PSA_SHARING) to search for rows that are designated for sharing. A row is eligible for the Sharing process if the organization that owns the project or activity differs from the organization that owns the transaction, an applicable sharing rule exists, and the row does not qualify as an exception to the sharing rules.

> **Note**
>
> Contracts with a *Government* classification are not eligible for organizational sharing.

Limits Processing

When the Pricing process runs as a standalone process, and if you use PeopleSoft Contracts, the Pricing process calls the Apply Limits Application Engine process (CA_LIMIT) for the contract line that is being priced. Use the Pricing run control page to run Pricing as a standalone process. The Pricing process passes run control parameters to the Apply Limits process to create over-the-limit rows for revenue transactions, billing transactions, or both.

When the Pricing process is automatically triggered by incoming transactions from feeder systems, the Pricing process also calls the Limits process. The Pricing process uses the selected pricing options (Revenue and Billing) on the Project Costing Options page for the business unit of each row, and it passes those parameters to the Limits process to determine the type of transactions to limit check: revenue, billing, or both.

You can also run the Apply Limits process in PeopleSoft Contracts independently of the Pricing process. Regardless of how the Apply Limits process is called, it evaluates transaction level

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limits first and then contract line level limits for all pending transactions for each contract line in its scope. Resulting over-the-limit transactions are excluded from revenue recognition and billing, and are not sent to PeopleSoft General Ledger or PeopleSoft Billing, respectively, except for over-the-limit transactions that are created from released retainage, which pass from the billing worksheet directly to the Project Transaction Temporary Billing table (PROJ_RES_TMP_BI) to be inserted into the Project Transaction table.

Because you apply limits at the contract line level, you cannot run the Apply Limits process for specific PeopleSoft Project Costing business units, projects, or activities.

The system limit checks these analysis types:

- BIL (Billable Amount)
- OLT (Over Limit)
- REV (Revenue)
- ROL (Revenue Over Limit)

The system uses these analysis groups to process limits:

- PSLMT (Limit Processing - Billing)
- PSROL (Limit Processing - Revenue)

Related Topics

- PeopleSoft Contracts: Understanding Limits
- PeopleSoft Contracts: Setting Up Limits
- PeopleSoft Contracts: Processing Limits
- PeopleSoft Contracts: Reviewing and Releasing Limits
- PeopleSoft Contracts for Government Contracting: Understanding Limits
- PeopleSoft Contracts for Government Contracting: Setting Up Limits for Government Contracts
- PeopleSoft Contracts for Government Contracting: Processing Limits
- PeopleSoft Contracts for Government Contracting: Reviewing Limit Processing

Pricing Transactions Associated with Work Orders

PeopleSoft Project Costing tracks the cost of work that is performed against tasks on a work order if you use PeopleSoft Maintenance Management. Transaction costs flow from PeopleSoft Maintenance Management into various PeopleSoft applications such as PeopleSoft Time and Expense, Inventory, Payables, and Purchasing, and from these systems into PeopleSoft Project Costing. PeopleSoft Project Costing also tracks the cost of tools usage by retrieving the actual time that users record for tools on a work order task, and using the time as a basis to calculate the tools usage cost.

The Project Transaction table stores the work order business unit, work order ID, task ID, work order resource type, and work order resource line number for each transaction row for the work order task.

When you set up rate sets for use with work orders, select the *WBI* and *WCO* rate options on the Rate Sets - Target page for the Pricing process to use the work order labor bill and cost rates to calculate target rows. Select the *TBI* and *TCO* rate options for the Pricing process to use actual time recorded for tools usage in PeopleSoft Maintenance Management, and the

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tools cost and bill rates from the Technician Workbench - Tools Usage page to calculate target rows.

The high-level steps to set up work order pricing are:

- Create rate sets in PeopleSoft Project Costing.
- Specify default rate sets for the work order business unit.
- Use the default rate set on the work order or specify an alternate rate set.

  The system updates activities with new rate sets on the work order.
- Run the Pricing process for repricing if you change the default rate set on a work order.

Related Topics

- Understanding Integration with PeopleSoft Maintenance Management
  PeopleSoft Maintenance Management is a PeopleSoft Asset Lifecycle Management solution that gives you the tools to plan and schedule maintenance and construction, facilitate the accurate completion of the work, streamline the capture of the results, and automatically process the financial implications of the work. PeopleSoft uses work orders in PeopleSoft Maintenance Management to track the costs associated with maintaining or creating assets.
- Understanding Work Order Transaction Processing
  This topic discusses:
- Understanding Work Order Asset Capitalization and Retirement
  This topic lists prerequisites and discusses:
- Understanding Integration Setup
  You use pages in both PeopleSoft Maintenance Management and PeopleSoft Project Costing to set up the integration between these systems. This table lists the integration setup steps, the application pages used to accomplish the steps, and the applications that own the pages:
- Understanding the PeopleSoft Project Costing Pages Used in Work Order Business Processes
  This table summarizes the PeopleSoft Project Costing application pages that work order business processes use:
- Setting Up Rate Sets and Asset Integration Rules
  You use pages in PeopleSoft Maintenance Management and PeopleSoft Project Costing to set up the integration. This topic discusses the setup pages that are in PeopleSoft Project Costing only.
- Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing
- Pricing Work Order Costs
- Retiring Work Order Assets
- PeopleSoft Maintenance Management: Setting Up Rules and Data Related to PeopleSoft Project Costing

Understanding Pricing Projects from Proposals

If you use PeopleSoft Proposal Management and PeopleSoft Program Management, Proposal Management uses the bill and cost role rates and hours that are captured in the proposal to populate the Resources page and Resources by Activity page in PeopleSoft Program Management. Unadjusted role rates are treated as *Project Role* rate types and have the rate that was in effect when the role was added to the proposal. Adjusted role rates are treated as *Override* rate types.

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Rate sets for labor from proposals can use rate options *ABI* and *ACO* for labor source transactions. These rate options tell the Pricing process to use the bill and cost rates on the Resources by Activity page in PeopleSoft Program Management to calculate billing and costing amounts for labor source transactions. Use the Resources by Activity page to modify role rates for projects from proposals.

The system obtains nonlabor pricing information from the rate set, and rate plans from the contract lines in PeopleSoft Contracts.

The Pricing process treats resource classes of *Asset, Material,* and *Other* as nonlabor resources. Rate sets for nonlabor from proposals use a rate option of *NON* (Bill at Cost). After the Proposal Management Generate process completes, the Pricing process and the Distribute Costs to Budgets Application Engine process (PGM_SPREAD) do not retrieve any information from the proposal Management proposal.

Markups and Markdowns

On the Project Definitions - Rates page for projects that are created from proposals, you can enter a labor or nonlabor adjustment percentage that the system uses to determine a billing markup or markdown row amount. This field appears for projects that are created from proposals in PeopleSoft Proposal Management.

The labor adjustment percentage is used in conjunction with the *AML* rate option that you select on the Rate Sets - Target page. The *AML* rate option tells the system to use the signed percentage amount in the **Labor %** field on the Project Definitions - Rates page to determine the markup or markdown value. The *AMN* rate option tells the system to use the signed percentage amount in the **Non-Labor %** field on the Project Definitions - Rates page to determine the markup or markdown value. The Pricing process creates the target transaction values based on the signed percentage of the source transaction rows.

You can create markup and markdown target billing transactions from labor and nonlabor source transactions. You cannot create markup and markdown target costing transactions from labor and nonlabor source transactions.

Understanding Variance Pricing

This topic discusses:

- Variance pricing.
- Variance rates.
- Variance pricing setup requirements.
- Variance pricing process flow.
- Variance pricing statuses.
- Example of using effective-dated rate set in variance pricing.

Variance Pricing

Variance pricing is used to capture and process price variances for a particular set of rates. Variance pricing, or retroactive rate adjustments, are required when contractors retroactively apply new rates to transactions that were previously processed. Transactions that have previously been processed are those that have been billed or sent to the general ledger.

You can apply variance pricing to all contract types and all rate set types. In addition, the Pricing summarization feature can be used, which reduces the number of transaction rows that are processed, in turn reducing the amount of time that it takes to run the Variance Pricing

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process. The Pricing summarization feature can also be used to reduce the number of transaction rows that result from the Variance Pricing process, which are ultimately posted to the Project Transaction table (PROJ_RESOURCE).

You can enable variance pricing on a standard or contract-specific rate set by selecting the Enable Variance check box. When using this option, you can enter, track, and process variance rates on the Rate Variance History page.

You cannon inactive variance pricing on a rate set if a variance rate exists on one or more target rows in an effective-dated rate set.

Through its integration with Project Costing, Contracts enables you to capture and process any rate changed for indirect costs that are associated with the contract. The rate changes generally impact a certain period of time within the contract. For a transaction to be eligible for variance pricing, at least one of its source or target rows must have been sent to the billing worksheet, passed to PeopleSoft Billing for invoicing, passed to PeopleSoft General Ledger for revenue recognition, sent to Asset Management for capitalization, or have been used for fee calculations.

When rate changes occur, the system verifies whether the transaction rows are eligible to be repriced. If they are, then those transaction rows are repriced by the Pricing engine and are ineligible for variance pricing.

New indirect costs are generated by the system for the difference in the old and new rates, and the new rates are used to calculate indirect costs against any current or future transactions going forward. When a rate change is made to an eligible rate set that is associated with a rate plan, after the new transaction row is created, the system prices the new row using any applicable remaining rate sets contained in the rate plan.

PeopleSoft Project Costing maintains a history of these rate changes for audit and reporting purposes.

Variance Rates

To enable the system to calculate and produce transaction rows for rate changes, you must complete the following tasks:

- Define a rate set with a rate definition type of Cost, Billing, or Cost/Billing.

  Your costing and cost/billing rate sets contain your provisional and forward pricing rates, and enable you to calculate indirect costs. Variance pricing is only applicable to active rates where associated transactions have been billed, recognized as revenue or used for fee calculations for cost-plus contracts lines. Any rate changes that occur are tracked and managed using the rate sets that you define for the contract.

  When rate changes are processed by the Variance Pricing process, the system generates transaction rows for the difference between the old indirect cost row and the new indirect cost row, prices the new row, and assigns a system source of PRV (variance pricing), and the analysis type that was defined for the original target costing row.
- Select an optional Rate Set Category that indicates that the rate set category can be selected on the Variance Pricing run control page.
- Associate the rate set or a rate plan that contains a cost, billing, or cost/billing rate set, to the contract lines.
- When a rate change has occurred, select the Enable Variance check box on the rate set and enter the new target rate amount using the history link.

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Variance Pricing Setup Requirements

Before entering retroactive rate changes for your contract lines, you must first complete the following steps required by the variance pricing process:

1. Assign rate-based contract lines to the contract.
2. (Optional) Create a rate set category that is used during the Variance Pricing process.
3. Create a standard or contract-specific rate set or rate plan.

   Optionally assign a rate set category to the rate set.

   Assign the rate set or rate plan to the applicable contract lines.

   Enable Variance check box selected. To bill and recognize revenue for contract-related direct and indirect costs, you must create a billing rate set (if not using the cost/billing rate set) and a revenue rate set if you have selected the Separate As Incurred Billing and Revenue check box on the contracts.

   Because you can assign only one rate set or rate plan to a rate-based contract line at one time, you will most likely combine your cost, billing, and revenue rate sets onto a rate plan in a manner that meets your pricing needs, and assign the rate plan to your rate-based contract lines.

   > **Note**
   >
   > Rate sets that are eligible for variance pricing cannot have the same field values for analysis type, source type, category, or subcategory for both the source and target definition criteria. At least one value must be different between the source and target row.

4. Assign active projects and activities to your rate-based contract lines.

   Transactions for rate-based contract lines are tracked using projects and activities associated with the contract line, and stored in the PROJ_RESOURCE table.

5. Set the contract to an active processing status and process transactions.

   Transactions that are eligible for variance pricing are project-related transactions associated with rate-based contract lines that are processed through Project Costing. To process transactions for contract and rate-based contract lines you must also define as-incurred billing and revenue plans and assign them to the applicable rate-based contract lines for billing and revenue processing for your transaction.

Variance Pricing Process Flow

After a contract has been activated and transactions have been processed, any rate changes that occur over the life of the contract can be applied using the Variance Pricing feature.

This feature enables you to apply rate changes as needed by performing the steps described in this process flow diagram:

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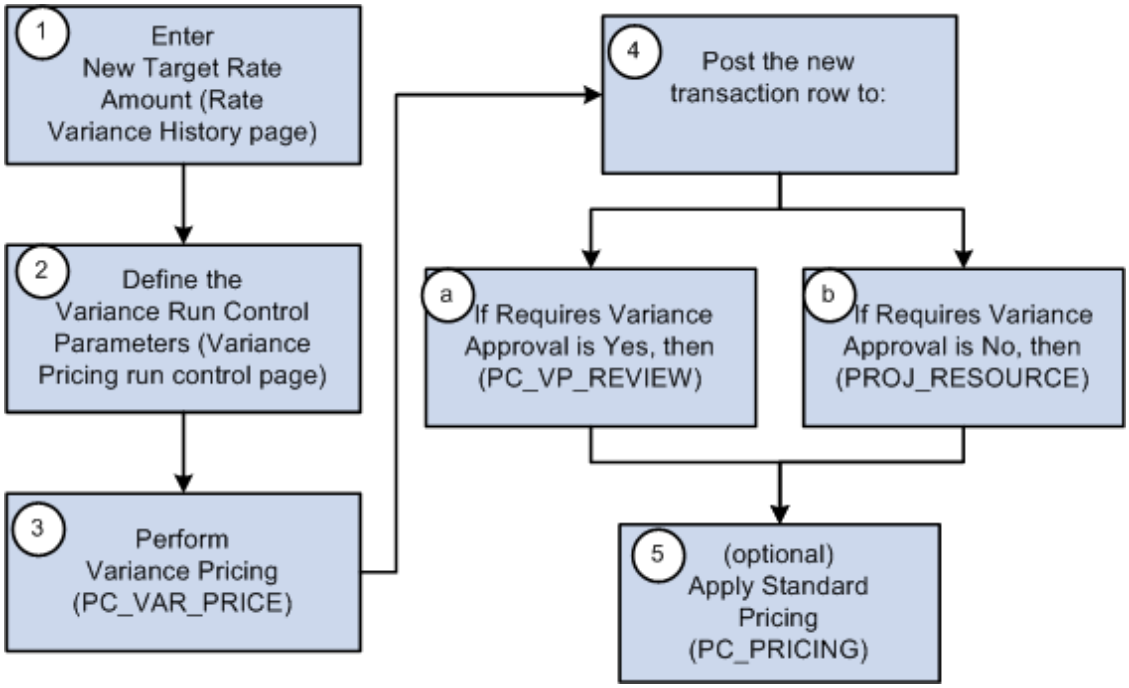

These steps illustrate a high level example of using variance pricing to distribute transactions at a new rate that you previously distributed at a different rate:

1. Access the active rate set to enter the new rates for the target definition.

   Variance rates are generally applied retroactively, over a specified period of time. When accessing the rate set, you must use Correction mode to open the page for the appropriate effective date. To access the Rate Variance History page, navigate to the Target page and enter the new rates for the target definition. Variance rates are tracked and processed using the Rate Variance History page.

2. Define the variance pricing run control parameters.

   The Variance Pricing process selects the data to process based on the criteria that you specify on the Variance Pricing run control page such as business unit, project ID, activity, ID, accounting or transaction date range, contract information, rate set, rate plan, and rate category.

   The Variance Pricing process applies this logic:

   - Selects rate sets based on the parameters specified on the Variance Pricing run control page.
   - Selects active contracts and projects associated with the rate set specified on the Variance Pricing run control page.
   - Projects associated with the rate set must be active, and contracts associated with the rate set cannot have a closed processing status.

3. Perform variance pricing.

   The Variance Pricing process performs these steps:

   a. Selects the eligible transactions that match the effective date and source criteria for the rate set.

      Eligible transactions include transaction rows that are not eligible for repricing and have a general ledger distribution status (GL_DISTRIB_STATUS) of G (generated) or

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D (distributed), a billing distribution status (BI_DISTRIB_STATUS) of W (worksheet) or D (distributed), and do not have a system source of PRR (priced for revenue) or PRP (priced for billing). Transactions with an asset management distribution status (AM_DISTRIB_STATUS) of D (distributed) and transactions with a contracts fee status (CA_FEE_STATUS) of 1 (one), where the transaction has been used for billing or revenue fee calculations for cost-plus contract lines, are also eligible for variance pricing, whether or not the actual transaction has been billed or posted to the general ledger for revenue recognition.

b. Calculates the difference between the old rate and the new rate using this equation:

   Variance Amount = (original source) x (new rate) – (original source) x (old rate). This amount may be positive or negative.

c. Creates the new transaction rows for the difference and posts them to the Project Transaction table (PROJ_RESOURCE).

   The new transaction rows are assigned the analysis type assigned to the original target row, stamped with a system source of PRV (variance pricing), assigned a cost, revenue, and billing distribution status of N to enable cost stacking, billing, and revenue recognition to occur for the new transactions, and assigned a general ledger distribution status of C. The accounting date is specified on the run control page and the transaction date is stamped with the source transaction date.

4. After the variance pricing process is complete, the system posts the new transaction rows one of two locations:

   a. If the Requires Variance Approval check box is selected on the Variance Pricing run control page, then the new transaction rows are posted to a staging table (PC_VP_REVIEW). You must access the Variance Pricing Review page to approve or delete transaction rows prior to sending the approved rows to the Project Transaction table (PROJ_RESOURCE).

   b. If the Requires Variance Approval check box is not selected on the Variance Pricing run control page, then the new transaction rows are posted to the Project Transaction table (PROJ_RESOUCE).

5. (Optional) Applies standard pricing.

   Based on the run control parameters, the Variance Pricing process calls the Pricing engine (PC_PRICING) to apply the new rate to all transaction rows that have been priced, but have not been billed or booked to the general ledger, or that have not been priced. It also prices any transactions that have not been priced, but are eligible for pricing.

> **Note**
>
> When you run the variance pricing process, the system automatically excludes contracts with a processing status of *Closed.* Additionally, rows created as part of the variance pricing process are not eligible for repricing.

Variance Pricing Statuses

When entering variance pricing rate changes, each row is assigned a status. The statuses are set and controlled by the system and control the type of action or processing that can occur against the variance rate row. The rate target sequence statuses are:

- *Pending:* Appears by default when a new variance rate row is added.

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Only one pending rate row may be entered at a time for a target definition. When a variance pricing rate row is in pending status:

- The rate field is editable.
- The rate cannot be selected and used for pricing.
- The rate displays only on the Rate Variance History page and does not appear on the Target page for the rate set.

- *Active:* After the new variance pricing rate is entered, and the Variance Pricing process is run for the rate set, the system updates the status of the new rate to Active.

  Only one active rate row may exist at a time for a target definition. When a variance pricing rate row is in active status:

  - The rate field is display only and cannot be edited.
  - The new rate is selected and used for pricing by the Variance Pricing and the Pricing processes.
  - The new rate is displayed on the Target page for the rate set and is associated with a sequence number.

- *Inactive:* After the new variance pricing rate is active, the previous rate row is set to an inactive status by the Variance Pricing process.

  Multiple inactive rate rows can exist for a target definition. When a variance pricing rate row is in an inactive status:

  - The rate field for the inactive row is display only and cannot be edited.
  - The old rate cannot be selected and used for pricing.
  - Inactive rates are displayed only on the Rate Variance History page.

Example of Using Effective-Dated Rate Sets in Variance Pricing

The Effective-Dated Rate Definitions topic, provides an example of using effective-dated rate sets. The example used a rate set with two active effective-dated rows as shown in this table:

Rate Set Rows	Effective Date	Source Analysis Type	Target Rate Option	Target Rate	Target Analysis Type
SET1 Row 1	January 1, 2004	TLX (incoming time report)	AMT (quantity x target rate	25.00 USD	ACT (actual cost transaction)
SET1 Row 2	January 1, 2005	TLX	AMT	50.00 USD	ACT

In the example, a source transaction row contained a quantity and unit of measure of 8 MHR, with a transaction date, accounting date, and currency effective date of June 1, 2005. The Pricing process created an actual transaction row in the amount of 400.00 USD by using the rate set named SET1 with an effective date of January 1, 2005, and multiplying 8 MHR by a target rate of 50.00 USD.

Now assume that on July 1, 2005 you want to retroactively apply a new rate of 100.00 USD to existing actual transaction rows that were created after January 1, 2005. The target rate that was previously applied to these actual transactions was 50.00 USD, thus the Variance Pricing process needs to apply the net difference of 50.00 USD. You enter the new rate in a pending status on the Rate Variance History page for the SET1 rate set. When you run the Variance

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Pricing process, the system inactivates the existing active rate and changes the new rate to an active status, as shown in this table:

Rate Set	Effective Date	Variance Pricing Row Status	Target Rate Option	Target Rate
SET1	January 1, 2005	Inactive	AMT	50.00 USD
SET1	January 1, 2005	Active	AMT	100.00 USD

To run Variance Pricing on the transaction row that was originally priced at a rate of 50.00 USD, select the SET1 rate set with an effective date of January 1, 2005 on the Variance Pricing run control page. The process creates a new row against the original transaction based on the net difference of 50.00 USD. In this example, you select an accounting date of July 1, 2005 on the run control page that the system applies to the new transaction row, as shown in this table:

Accounting Date	Project	Activity	Quantity	Rate	Analysis Type	Amount
July 1, 2005	PROJ1	ACT1	8 MHR	50.00 USD	TLX	400.00 USD

The Variance Pricing process ignores transactions that have an accounting date (or specified date type) that are outside of the effective date range of the selected rate set.

Now assume that later you add a new SET1 rate set row with an effective date of July 1, 2006. You discover that you need to calculate pricing variances again on the output rows from the original transaction dated June 1, 2005. Because the system matches the specified date type of the priced costing row to the effective date range of the rate set to determine eligible transactions, you select the rate set effective date of January 1, 2005 for this Variance Pricing run control.

For additional information relating to government contracts and variance pricing, see PeopleSoft Contracts for Government Contracting: Understanding Variance Pricing

Importing Transactions into PeopleSoft Project Costing

Various PeopleSoft Application Engine processes that are specific to feeder system applications send cost transactions to PeopleSoft Project Costing.

Project Costing summarization templates can be used to summarize transaction rows that are imported into the Project Transaction table. For additional information about summarizing feeder transactions, see Understanding Feeder and Pricing Summarization

Pages Used to Bring Process Cost Transactions into PeopleSoft Project Costing

Select each page from the **Project Costing**, **Cost Collection** menu option.

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Page Name	Definition Name	Usage
Time and Labor	PC_TL_TO_PC	Run the Time and Labor to Project Costing Application Engine process (PC_TL_TO_PC) to pull data from PeopleSoft Time and Labor into PeopleSoft Project Costing. The billing distribution status of the transaction rows that are imported by using the Time and Labor to Project Costing process is based on the billable indicator in the PeopleSoft Time and Labor system. These transaction rows are sent to the Pricing process with cost and revenue distribution statuses of *N*.
Expenses	PC_EX_TO_PC	Run the Expenses to Project Costing Application Engine process (PC_EX_TO_PC) to pull approved expenses from PeopleSoft Expenses into PeopleSoft Project Costing. In PeopleSoft Expenses, if you specify a billing action of *Nonbillable* or *Internal* on a detail time or expense row, the Expenses to Project Costing process creates a transaction row in the Project Transaction table with a billing distribution status of *U* (unbillable). The system assigns an analysis type to the transaction based on the analysis type that is specified in the **Expenses** field (for expense rows) or **Mobile Time** / **Expense** field (for time rows) on the Installation Options - Project Costing Integration page. When you price the unbillable row, if the target analysis type on the rate set belongs to the PSWKS analysis group, the system deletes the target row and does not post it to the Project Transaction table.
Payables	PC_AP_TO_PC	Run the Run the Payables to Project Costing Application Engine process (PC_AP_TO_PC) to pull approved vouchers from PeopleSoft Payables into PeopleSoft Project Costing.

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Page Name	Definition Name	Usage
Inventory	PC_IN_TO_PC	Run the Inventory to Project Costing Application Engine process (PC_IN_TO_PC) to pull fulfilled demand from PeopleSoft Inventory into PeopleSoft Project Costing.
Order Management	PC_OM_TO_PC	Run the Order Management to Project Costing Application Engine process (PC_OM_TO_PC) to pull project data from open sales orders into PeopleSoft Project Costing.
Purchasing	PC_PO_TO_PC	Run the Purchasing to Project Costing Application Engine process (PC_PO_TO_PC) to pull purchase order transactions into PeopleSoft Project Costing.
Services Procurement	PC_SP_TO_PC	Run the Services Procurement to Project Costing Application Engine process (PC_SP_TO_PC) to pull timesheets, expense transactions, and progress log information into PeopleSoft Project Costing.
Maintenance Management Tools Usage	PC_WM_TO_PC	Run the Maintenance Management Tools Usage Application Engine process (PC_WM_TO_PC) to pull work order tools usage transactions into PeopleSoft Project Costing.
Excluding Transactions from Integrations into Project Costing	PC_EXC_CRITERIA	Identify the types of transactions to exclude from integrations into Project Costing.

Excluding Transactions from Integrations into Project Costing

The Cost Collection process integrates project transactions from many different applications in PeopleSoft Financials and PeopleSoft Time and Labor. Transactions with a Project's Business Unit, Project, and Activity are included in the cost collection process. Based on your use of project costing some project transactions may not need to be integrated into Project Costing. The Integration Exclusions page provides configurable criteria for excluding transactions from the PeopleSoft Expenses, General Ledger, and Accounts Payable cost collection processes reducing the volume of unnecessary transactions in the project costing (PROJ_RESOURCE) table.

Setup Integration Exclusions Tile

Use the Setup Integration Exclusions tile to view Integration Exclusions page.

Navigation:

This tile can be placed on any PeopleSoft Fluid Home page. For additional information about how to add a tile to a PeopleSoft Fluid Home page, see *PeopleTools: Application User's Guide*,

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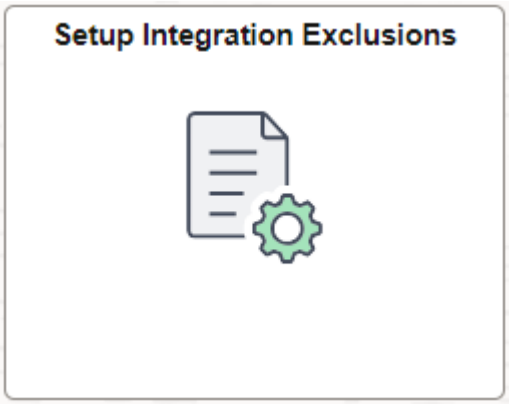
"Working With PeopleSoft Fluid User Interface", "Working With Fluid Homepages", "Managing Tiles", and "Adding Tiles to a Fluid Homepage".

This example illustrates the fields and controls on the Setup Integration Exclusions tile.



Integration Exclusions Page

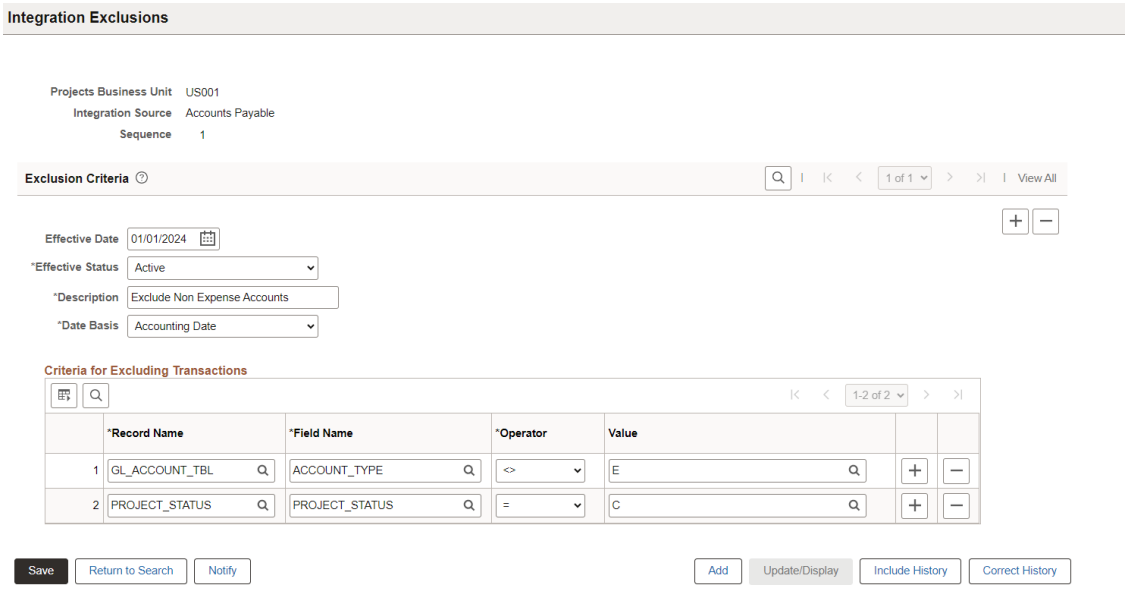
Use the Integration Exclusions (PC_EXC_CRITERIA) page to identify the types of transactions to exclude from the cost collection processes with Expenses, General Ledger, and Payables.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup Integration Exclusions**.

You may also use the Setup Integration Exclusions tile provided on the Project Management Homepage.

This example illustrates the fields and controls on the Integration Exclusions page.



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Field or Control	Description
Integration Source	'Select the integration source to which the exclusions apply. Choices are Accounts Payable, Expenses and General Ledger.
Sequence	An integration source can have multiple configurations by adding another sequence. Example: Sequence 1 can be used for criteria from one set of tables and Sequence 2 can be used for criteria for another set of tables. Sequence helps the administrator organize criteria into manageable groupings. Each sequence is processed independently.
Effective Date	Provide the effective date for the exception criteria.
Effective Status	Select the exception criteria status. All sequences with an Active Status are evaluated when the integration process is run.
Description	Provide the description for the exception criteria.
Date Basis	Date basis is used with Effective Date. Select if the Accounting Date or Transaction Date should be used at run time to determine the effective dated configuration to evaluate. A transaction is evaluated against only one effective dated configuration per sequence.
Record Name	Select a Record to which the criteria should be applied.
Field Name	Select the Field to which the criteria should be applied.
Operator	Select from the list of available operators.
Value	Enter the value for an excluded transaction. Prompts are available in the value column for some fields. If prompt values do not exist, then enter values directly into the value field. When using the 'In' operator, the excluded values should be separated with a comma. Example: Enter A,B,C to exclude transactions with an A, B, or C. You should not enter quotes around each value. For certain fields, SetID will appear in the prompt for Values. The SetID displayed is mapped to the Project Costing Business Unit selected when the configuration is created. When the PC_GL_TO_PC process is run, the GL_ACCOUNT_TBL will use the General Ledger Business Unit on the transaction to identify the setID on the GL_ACCOUNT_TBL.

Select **Save** and **Add** the exception criteria to the integration source.

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> **Note**
>
> Each row of criteria is evaluated independently. If a transaction meets the criteria for any row of criteria in any sequence, it will be excluded from the integration into project costing.

> **Note**
>
> Once a transaction is identified as Excluded in the source application, it will not be reevaluated. Meaning, changes to the Exclusion Criteria are applied prospectively.

Defining Rates for Employees, Job Codes, and Project Roles

To define rates for employees, job codes, and project roles, use these components:

- Rates by Employee (PC_RATE_EMPL).
- Rates by Job Code (PC_RATE_JOBC).
- Rates by Role (PC_RATE_ROLE).

Use the PC_RATE_EMPL_INTFC component interface to load data into the tables for the PC_RATE_EMPL component.

Use the PC_RATE_JOBC_INTFC component interface to load data into the tables for the PC_RATE_JOBC component.

Pages Used to Define Rates for Employees, Job Codes, and Project Roles

Page Name	Definition Name	Usage
Rates by Employee	PC_RATE_EMPL	Define, view, and modify cost and billing rates for the selected employee. The Pricing process uses the PC_RATE_EMPL_VW view to apply employee rates to cost transactions. Rates that you access by using this view are visible on the Rates by Employee page. To access this page, select **Setup Financials/Supply Chain**, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Setup PC Pricing Employee Rate**.

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Page Name	Definition Name	Usage
Rates by Job Code	PC_RATE_JOBC	Define, view, and modify cost and billing rates for a specific job code. The Pricing process references the PC_RATE_JOBC_VW view to apply job code rates to cost transactions. Rates that you access by using this view are visible on the Rates by Job Code page. To access page, select **Setup Financials/Supply Chain**, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Setup PC Pricing Job Code Rate**.
Rates by Role Page	PC_RATE_ROLE	Define, view, and modify cost and billing rates for a specific project role. The Pricing process references the PC_RATE_ROLE_VW view to apply project role rates to cost transactions. Rates that you access by using this view are visible on the Rates by Role page.

Rates by Role Page

Use the Rates by Role page (PC_RATE_ROLE) to define, view, and modify cost and billing rates for a specific project role.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Setup PC Pricing Role Rates**

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

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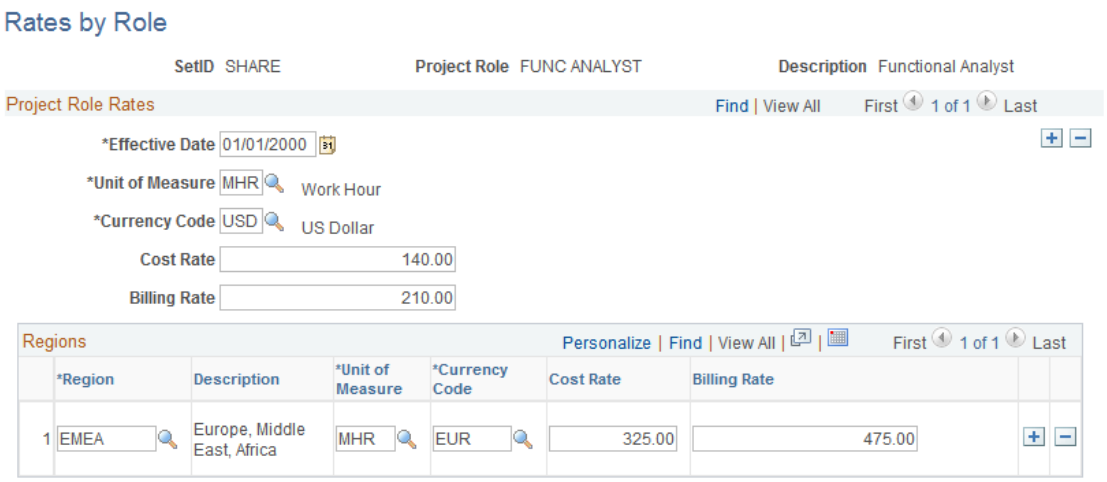

Enter the necessary data to define cost and billing rates for a project role.

Field or Control	Description
Unit of Measure	Enter the unit of measure for which the rate is defined. If a unit of measure conversion is defined, a conversion takes place during processing for transactions that use a different unit of measure.

Regions

Assign one or more rates to a project role based on different regions by using the **Regions** grid. The **Regions** grid appears if you use PeopleSoft Program Management and PeopleSoft Resource Management. Use this feature if you want to price labor differently for roles that are performed on projects at different locations.

These two conditions must exist for you to price labor based on different locations:

- In the Bill and Cost tabs in the Resources page and Resources by Activity page in PeopleSoft Program Management, the rate type must be *Project Role.*
- On the Rate Sets - Target page for the rate set that is associated with the activity, the rate option must be *ABI* (Activity Resource Bill Rate) or *ACO* (Activity Resource Cost Rate).

If these conditions exist, the Pricing process creates target transaction rows by using the rate that corresponds to the resource's region in the **Regions** grid on the Rates by Role page.

If you select the *RBI* (Role Bill Rate) or *RCO* (Role Cost Rate) rate option on the Rate Sets - Target page, the Pricing process uses the default project role rate that is defined on the Rates by Role page. The process disregards regional rates when you use the *RBI* or *RCO* rate option.

You are not required to associate a region with a project role rate. If the role and region combination is not defined on the Rates by Role page, the system uses the default project role rate.

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Setting Up Custom Rates

Page Used to Set Up Custom Rates

Page Name	Definition Name	Usage
Define Custom Rates Page	PC_CRATE_DEFN	Define and maintain custom rate definitions.
Populate Custom Rates Page	PC_CRATE_POPULATE	Populate custom rates on the Define Custom Rate page.

Defining and Using Custom Rates

Prior to using custom rates you must perform these steps:

1. Define custom rates using the Define Custom Rates Page.
2. Populate custom rates using the Populate Custom Rates page.

As an alternative to using this method of defining custom rates, you can use the PeopleSoft Data Migration Workbench and Application Data Sets (ADS) to move custom rate data. For additional information see Application Fundamentals: Understanding the PeopleSoft Data Migration Workbench.

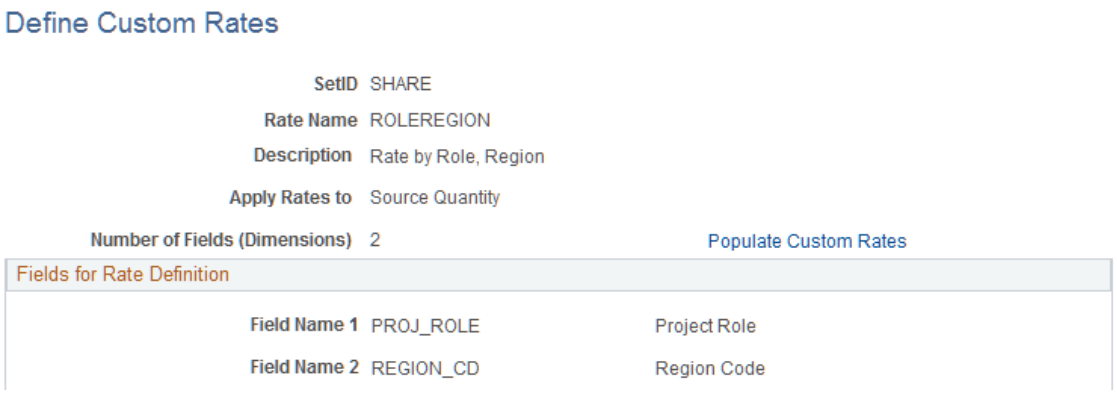
Define Custom Rates Page

Use the Define Custom Rates page (PC_CRATE_DEFN) to define and maintain custom rate definitions.

Navigation:

Set up Financials / Supply Chain , and then **Product Related**, and then **Project Costing** , and then **Pricing Structure** , and then **Setup PC Custom Rates**

This example illustrates the fields and controls on the Define Custom Rates page .



The purpose of the Custom Rate page is to provide you with the means to create different rate structures in addition to rates by employee, role, and jobcode. Custom rates enable you to create rates with multiple criteria. For example, you may want to define one custom rate based on job code and department, and a second custom rate based on source type and supplier.

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After defining the field names to use for a custom rate, access the Populate Custom Rate page to establish and maintain the cost and billing rates for the defined criteria.

When rates are populated using the Populate Custom Rates process, the Define Custom Rates page becomes display only. You cannot change field names after rates are populated. If you want to make a change, then you will have to create a new custom rate.

> **Note**
>
> The system data table is delivered without a prompt record for the RES_USER1 through RES_USER5 fields because these are user-defined fields. If you want to include a prompt record for these fields, use a SQL tools to update the PC_CRATE_FIELDS record directly.

Field or Control	Description
Rate Name	Enter a unique identifier for the custom rate.
Apply Rates to	Select *Source Amount* or *Source Quantity*. The pricing process calculates the target amount based on the option selected in this field. If *Source Amount* is selected, then the target amount is calculated as transaction amount x custom markup. If *Source Quantity* is selected, then the target amount is calculated as transaction quantity x custom rate.
Number of Fields (Dimensions)	Select a number from 1 to 5. This number indicates the number of field names that appear in the Select Fields for Rate Definition section.
Populate Custom Rates	Click this link to access the Populate Custom Rates page.

Fields for Rate Definition

Field or Control	Description
Field Name (1-5)	Select a field name from the drop-down list. This list includes selected fields that are available on the Project Resource table (PROJ_RESOURCE), project role field (PROJ_ROLE), and the region code field (REGION_CD) . Depending on the number selected in the Number of Fields (Dimensions) drop down, the system displays one to five fields. For example, if you select 3 in the Number of Fields (Dimensions) field, then the system displays Field Name 1 – 3. **Note:** Whatever field names you use to define a custom rate, should have values when a transaction is sent to the Project Resource table (PROJ_RESOURCE).

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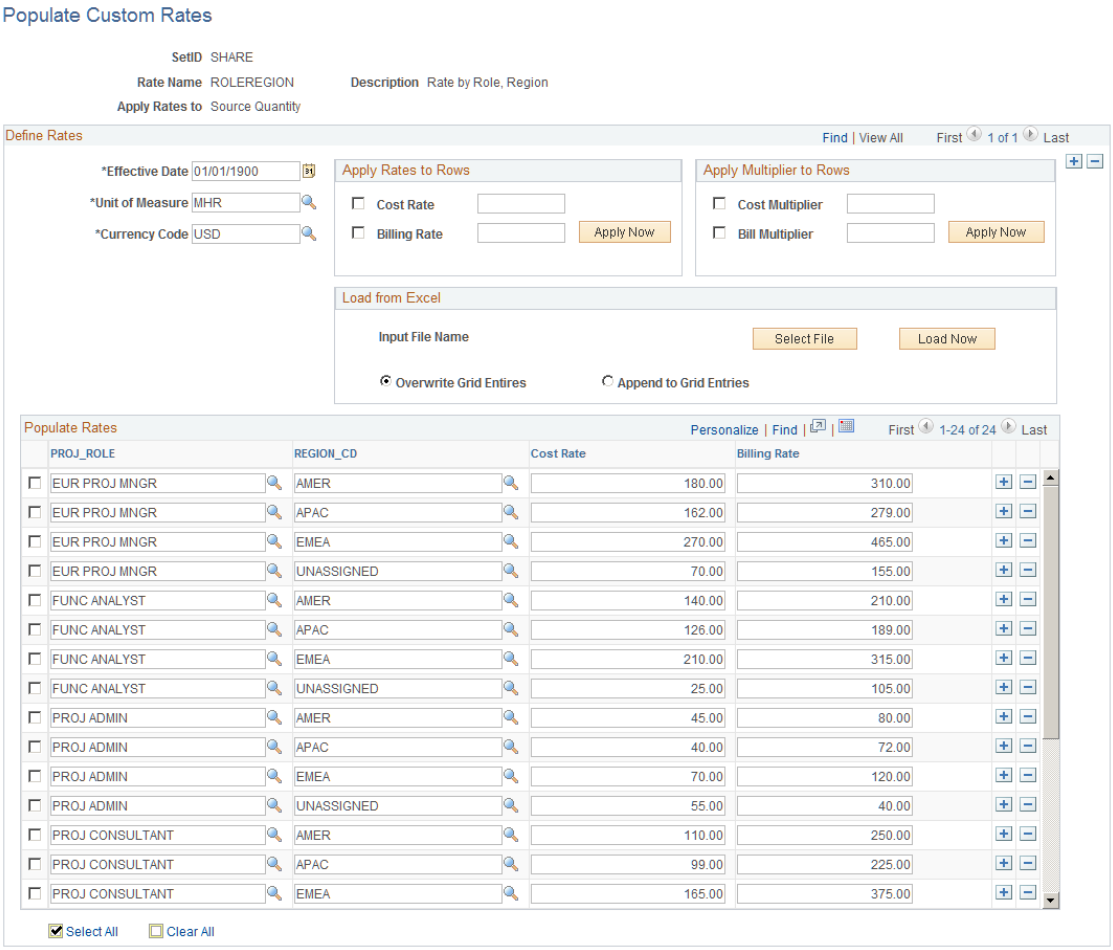
Populate Custom Rates Page

Use the Populate Custom Rates page (PC_CRATE_POPULATE) to populate custom rates on the Define Custom Rate page.

Navigation:

Set up Financials / Supply Chain , and then **Product Related** , and then **Project Costing** , and then **Pricing Structure** , and then **Populate Custom Rates**

This example illustrates the fields and controls on the Populate Custom Rates page.



The Populate Custom Rates page enables you to establish and maintain cost and billing rates that can be used for projects. This page enables you to enter the rates manually, or use the available tools to help load or update the rates. You can:

- Enter a cost rate and billing rate manually.
- (Optional) Use the Apply Rates to Rows tool to enter a cost rate, a billing rate, or both onto selected rows of data on the grid.
- (Optional) Use the Apply Multiplier to Rows tool to update a cost rate, a billing rate, or both by multiplying the existing rate with a multiplier to selected rows of data on the grid.

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- (Optional) Use the Load from Excel tool to import rates from an excel file and override existing entries.
- (Optional) Use the Load from Excel tool to import rates from an excel file and add to existing entries.

The Populate Rates grid is displayed based on the fields entered for the rate name on the Define Custom Rates Page. The Define Custom Rate page determines the column headings that appear in front of the Cost Rate and Billing Rate columns. For example, if you select *3* in the **Number of Fields (Dimensions)** field, and define these three field names: *JOBCODE, ACCOUNT*, and *DEPTID* in the Selected Fields for Rate Definition section of the Define Custom Rate page, then the system displays JOBCODE, ACCOUNT, DEPTID, Cost Rate, and Billing Rate as the columns on the Populate Custom Rates page.

> **Note**
>
> When importing Field Name values from an excel file, you must have all five Field Name columns, even if you're not using columns 4 and 5, plus the Cost Rate and Billing Rate columns. This equals a total of seven columns that should be on the spreadsheet.

After a custom rate is defined and the rates are populated, the custom rate can be associated with a rate set. When the Pricing process (PC_PRICING) runs, the appropriate custom rate value is used to calculate the cost of the priced transaction. The priced transaction is then written to the Project Transaction table (PROJ_RESOURCE).

Define Rates

When the **Apply Rates to** field displays *Source Amount*, the **Unit of Measure** and **Currency Code** fields are hidden. When the **Apply Rates to** field displays *Source Quantity*, the **Unit of Measure** and **Currency Code** fields are displayed

Apply Rates to Rows (when rates are applied to the source amount)

This is an optional tool used to update multiple rows with a set cost, billing, or both markups.

Field or Control	Description
Cost Markup (check box)	Select to indicate that the cost markup should be applied to all selected rows in the grid when you click the Apply Now button.
Cost Markup	Enter the rate that will be applied to the Cost Markup column for all selected rows in the grid. This value can be zero.
Billing Markup (check box)	Select to indicate that the billing markup should be applied to all selected rows in the grid when you click the Apply Now button.
Billing Markup	Enter the rate that will be applied to the Billing Markup column for all selected rows in the grid. This value can be zero.
Apply Now	Click to apply the cost markup, billing markup, or both (depending whether they are selected in this group box) to the selected rows in the Populate Rates grid. The values are not saved until you click the Save button.

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Apply Rates to Rows (when rates are applied to the source quantity)

This is an optional tool used to update multiple rows with a set cost, billing, or both rates.

Field or Control	Description
Cost Rate (check box)	Select to indicate that the cost rate should be applied to all selected rows in the grid when you click the Apply Now button.
Cost Rate	Enter the rate that will be applied to the Cost Rate column for all selected rows in the grid. This value can be zero.
Billing Rate (check box)	Select to indicate that the billing rate should be applied to all selected rows in the grid when you click the Apply Now button.
Billing Rate	Enter the rate that will be applied to the Billing Rate column for all selected rows in the grid. This value can be zero.
Apply Now	Click to apply the cost rate, billing rate, or both (depending whether they are selected in this group box) to the selected rows in the Populate Rates grid. The values are not saved until you click the Save button.

Apply Multiplier to Rows

This is an optional tool used to update the cost, billing, or both rates by applying a multiplier on selected rows.

Field or Control	Description
Cost Multiplier (check box)	Select to indicate that the cost multiplier should be applied to all selected rows in the grid when you click the Apply Now button.
Cost Multiplier	Enter a multiplier that will be applied to the Cost Rate or Cost Markup column for all rows selected in the grid when you click the Apply Now button. This value can be zero.
Billing Multiplier (check box)	Select to indicate that the billing multiplier should be applied to all selected rows in the grid when you click the Apply Now button.
Billing Multiplier	Enter a multiplier that will be applied to the Billing Rate or Billing Markup column for all rows selected in the grid when you click the Apply Now button. This value can be zero.
Apply Now	Click to apply the cost multiplier, billing multiplier, or both (depending whether they are selected in this group box) to the selected rows in the Populate Rates grid. The values are not saved until you click the Save button.

Load from Excel

This is an optional tool to load the entire grid using data from an Excel .csv (comma separated value) formatted file.

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Field or Control	Description
Input File Name	Displays the name of the excel file when using the Select File button. After selecting a file the file name becomes a link that can be used to view the file.
Select File	Click this button to attach an excel file to the file server or database. When clicking this button, the system calls the browse dialog for file attachments. An excel .csv formatted file can be used to populate values in the grid.
Load Now	Click to populate values in the grid from an excel file. The excel file must be loaded and the name of the excel file must be displayed in the Input File Name as a link.
Override Grid Entries	Select to indicate that existing values in the grid are to be deleted before an excel file is loaded to the grid when you click the Load Now button.
Append to Grid Entries	Select to indicate that you do not want to delete existing values in the grid before an excel file is loaded when you click the Load Now button.

Populate Rates

The columns displayed prior to the Cost Rate column is based on the custom rate definition. Depending on the number selected in the Number for Fields (Dimensions) field, on the Define Custom Rates page, columns 2 through 5 may or may not be displayed.

The labels for these columns that are displayed are based on the values selected in the Select Fields for Rate Definition section of the Define Custom Rates page.

The prompts for these columns are delivered as system data on the PC_CRATE_FIELDS record.

These fields are required and cannot be blank.

Field or Control	Description
Cost Rate	Enter the cost rate that the system uses when the combination of values (that precede the Cost Rate column) is met on a project. This field is hidden when the rates are applied to the source amount.
Billing Rate	Enter the billing rate that the system uses when the combination of values (that precede the Cost Rate column) is met on a project. This field is hidden when the rates are applied to the source amount.
Cost Markup	Enter the cost markup that the system uses when the combination of values (that precede the Cost Markup column) is met on a project. This field is hidden when the rates are applied to the source quantity.

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Field or Control	Description
Billing Markup	Enter the billing markup that the system uses when the combination of values (that precede the Billing Markup column) is met on a project. This field is hidden when the rates are applied to the source quantity.

Importing Custom Rates from an Excel File

The excel .csv formatted file must contain 7 columns. The first 5 columns represent the values that correspond to the custom rate criteria fields. Even if your custom rate definition has less than 5 fields, you must still have 5 columns in your excel field. Leave unused fields blank. Your last 2 columns represent the cost rate and billing rate, in that order. Do not include headers in your file.

> **Note**
>
> Prior to populating custom rates, you must define the custom rate on the Define Custom Rates Page.

Example of a Spreadsheet

There are two tables in this example:

- The first table is informational only and describes the columns in your spreadsheet.

  > **Warning**
  >
  > DO NOT add these column headings to your spreadsheet.

- The second table is an example of the rows and columns that should appear in your spreadsheet.

  This table represents an example where the first column represents the JOBCODE field value 1. The second column represents the ACCOUNT field value2. The third column represents the Department ID field value 3. The fourth column and the fifth column are not used. The sixth column always represents the COST RATE. The seventh column always represents the BILL RATE.

  This table indicates that in the first row of a spreadsheet, when a transaction is recorded for job code KU036, account 100001, and department ID 14000, the system uses a cost rate of 100.00 and a bill rate of 150.00.

A	B	C	D	E	F	G
(FIELD VALUE1)	**(FIELD VALUE2)**	**(FIELD VALUE3)**	**(FIELD VALUE4)**	**(FIELD VALUE5)**	**COST RATE**	**BILL RATE**
JOBCODE	**ACCOUNT**	**DEPTID**	**(not used)**	**(not used)**		
KU036	100001	14000			100.00	150.00
KU036	100001	15000			100.00	150.00

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A	B	C	D	E	F	G
(FIELD VALUE1)	(FIELD VALUE2)	(FIELD VALUE3)	(FIELD VALUE4)	(FIELD VALUE5)	COST RATE	BILL RATE
JOBCODE	ACCOUNT	DEPTID	(not used)	(not used)		
KU051	100001	3600			65.00	75.00
KU051	100001	3700			50.00	55.00

Defining Rate Set Categories, Rate Sets, and Rate Plans

To define rate set categories, rate sets, and rate plans, use these components:

- Rate Set Category (PC_RATE_CATEGORY)
- Rates Sets (PC_RATE).
- Rate Plans (PC_RATE_PLAN).

Use the PC_RATE_INTFC component interface to load data into the tables for the PC_RATE component.

Pages Used to Define Rate Set Categories, Rate Sets, and Rate Plans

Page Name	Definition Name	Usage
Rate Set Category PageRate Set Category	PC_RATE_CATEGORY	Define categories that are used to group rate sets. The rate set category can be selected on the Variance Pricing run control page.
Rate Sets Page	PC_RATE_DTL	Define source criteria that identifies cost transactions from which you want to create target rows.
Enter New Rate Set Keys Page	PC_RATE_DTL_SUB	Copy a rate set to create a new rate set in the same business unit or across business units. To access this page, click **Copy from Rate Set** on the Rate Sets page.
Rate Sets - Target Page	PC_RATE_DTL_LN	Define rate set target criteria to create cost, billing, or revenue rows.
Rate Plans Page	PC_RATE_PLAN	Combine rate sets so that the target rows from one rate set are used to create additional target rows from the next rate set.
Enter New Rate Plan Keys Page	PC_RATE_PLAN_SUB	Copy a rate plan to create a new rate plan in the same business unit. To access this page, click **Copy from Rate Plan** on the Rate Plans page.

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Page Name	Definition Name	Usage
Using the Data Migration Workbench for PeopleSoft Project Costing	-	Application Data Sets (ADS) can be used with PeopleSoft Project Costing for the purpose of moving data between development environments, test environments, and ultimately to a production environment.

Rate Set Category Page

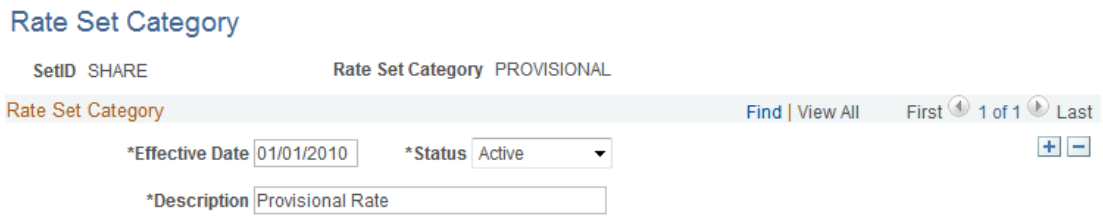
Use the Rate Set Category page (PC_RATE_CATEGORY) to define categories that are used to group rate sets.

The rate set category can be selected on the Variance Pricing run control page.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Setup PC Pricing Rate Set Cat**

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



The rate set category is used on the Variance Pricing run control page, where it can be selected in the Rate Processing Option field. If Rate Set Category is selected in the Rate Processing Option field, then all rate sets that are associated with the rate set category selected in the Rate Category field are selected when the Variance Pricing processes runs.

Rate Sets Page

Use the Rate Sets page (PC_RATE_DTL) to define source criteria that identifies cost transactions from which you want to create target rows.

Navigation:

- **Setup Financials/Supply Chain**, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Setup PC Rate Sets PC**
- **Customer Contracts**, and then **Contracts Center**, and then **Definitions**, and then **Rate Sets**, and then **Rate Sets**

This example illustrates the fields and controls on the Rate Sets page.

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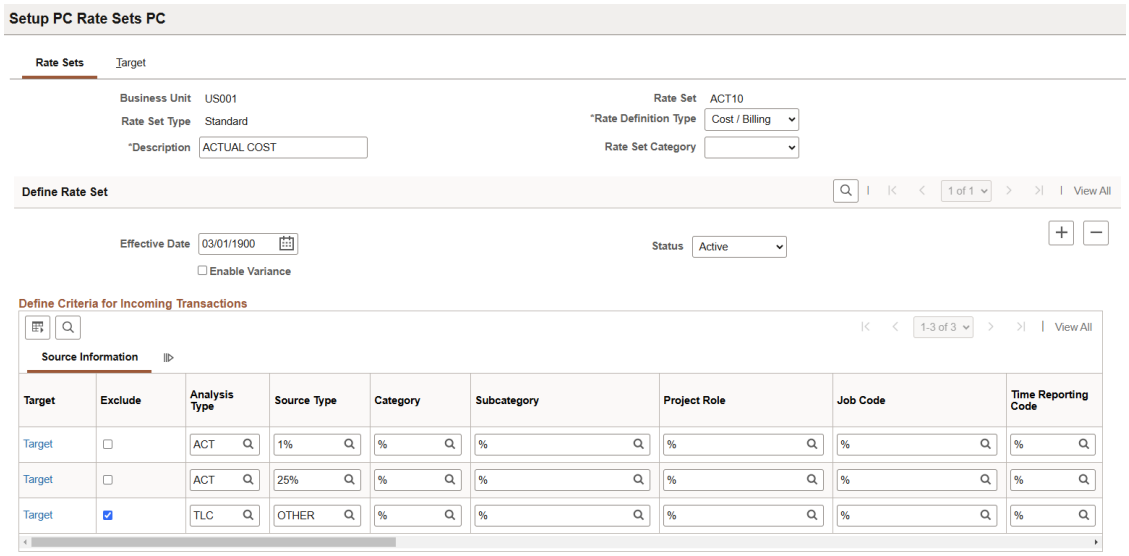

> **Note**
>
> As an alternative to using this method of defining rate sets, you can use the PeopleSoft Data Migration Workbench and Application Data Sets (ADS) to move rate set data. For additional information see Application Fundamentals: Understanding the PeopleSoft Data Migration Workbench.

Field or Control	Description
Rate Set	Enter a rate set identifier. Rate set identifiers are used to run the Variance Pricing Application Engine process (PC_VAR_PRICE) and as selection criteria when setting up a rate plan. This field is required.
Copy from Rate Set	Click to access the Enter New Rate Set Keys page to enter the business unit and rate set ID of an existing rate set that you want to copy. Click **OK** on the Enter New Rate Set Keys page to return to the Rate Sets page with fields populated with data from the existing rate set. The **Copy from Rate Set** button appears only in add mode. **Note:** You can copy a standard rate set to another standard rate set. You cannot copy contract-specific rate sets.

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Field or Control	Description
Rate Definition Type	Select one of the options that determines the type of target rows that the Pricing process will create from this rate set: *Billing:* Creates billable rows that can be passed to PeopleSoft Billing for invoice generation. These rows will also be used for revenue recognition if the associated contract does not separate billing and revenue. *Cost:* Creates target rows to track and calculate contract, project, and indirect costs. *Cost/Billing:* Creates cost and billing target rows. *Revenue:* Creates revenue recognition rows that can be passed to PeopleSoft General Ledger. Revenue Rate sets are required for revenue recognition if the associated contract separates billing and revenue. **Note:** The rate definition type can be changed after saving the page. However, the target analysis types must adhere to the selected rate definition type. **Note:** For standard rate sets, a warning message will be displayed when you attempt to update the **Rate Definition Type** to **Revenue** if it is in use on a contract that does not Separate As Incurred Billing and Revenue. A warning message also displays if this rate set is included in a rate plan, and that rate plan is assigned to a contract that does not Separate As Incurred Billing and Revenue. Similar edits are in place for contract specific rate sets except the system prevents the change from occurring rather than issuing a warning.
Rate Set Category	Select a category to which this rate set belongs. If the Enable Variance check box is selected and the rate set category is selected on the Variance Pricing run control page, then the rate set is selected during the Variance Pricing process.
Enable Variance	Select to indicate that this rate set can contain variance rates. This option enables you to enter a rate variance on the Rate Variance History page for target rows for the rate set and indicate that this rate set is eligible for variance pricing. You can activate or inactivate this option until you enter a variance rate on the Rate Variance History page. You cannot deselect this check box if a variance rate exists on one or more target rows. This option is available for all rate definition types. Variance pricing is available for all contract classifications. For additional information about variance pricing, See Understanding Variance Pricing.

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Defining Criteria for Incoming Transactions

To set up a rate set, you define criteria that the system uses to identify the source transactions from feeder systems that are priced using this rate set. Populate the additional fields to identify specific transactions that you want the system to select and price using this rate set.

The transactions matching source criteria marked as "Exclude" will not be priced and are not eligible for pricing by any other criteria within the rate set.

If you selected the **Enable Variance** option on the Rate Sets page, the source rows in the **Define Criteria for Incoming Transactions** grid must contain at least one different value for analysis type, source type, category, or subcategory than the target rows in the **Define Target Rows** grid. If this condition does not exist, when you click the **History** link on the Rate Sets - Target page to access the Rate Variance History page, a message will appear stating that the rate set definition is not eligible for variance pricing.

Field or Control	Description
Target	Click the **Target** link on a source row to define the target criteria that the Pricing process uses to create priced transaction rows.
Exclude	Select a source row to exclude from billing and revenue recognition. To mark as *Exclude*, a source row must not have a target defined.
Analysis Type	Enter the analysis type that the system uses to identify the source transactions that are priced using this rate set.
Source Type	Enter a source type to limit the transactions selected for pricing to only transactions that are associated with this specific source type. Source types enable you to define a value that identifies a transaction's purpose. You can use source types to track, analyze, and report on transactions.
Category	Enter a category to limit the transactions selected for pricing to only transactions that are associated with this specific category. Categories enable you to further define source types to better track the types of costs that are incurred against the project and activities.
Subcategory	Enter a subcategory to limit the transactions selected for pricing to only transactions that are associated with this specific subcategory. Subcategories enable you to further define categories to better track the types of costs that are incurred against the project and activities.
Project Role	Enter a project role to limit the transactions selected for pricing to only transactions that are associated with this project role.
Job Code	Enter a job code to limit the transactions selected for pricing to only transactions that are associated with this job code.
Time Reporting Code	Enter a time reporting code to limit the transactions selected for pricing to only transactions that are associated with this time reporting code.

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Field or Control	Description
Employee ID	Enter an employee ID to limit the transactions selected for pricing to only transactions that are associated with this employee.
Unit of Measure	Enter a unit of measure to limit the transactions selected for pricing to only transactions associated with this unit of measure.
Currency	Enter a currency code to limit the transactions selected for pricing to only transactions in this currency.
General Ledger Business Unit	Enter a GL business unit to limit the transactions selected for pricing to only transactions that are associated with this GL business unit.
Account	Enter an account code to limit the transactions selected for pricing to only transactions that are associated with this account code. Account codes classify the nature of a transaction.
Alternate Account	Enter an alternate account to limit the transactions selected for pricing to only transactions that are associated with this alternate account. Alternate accounts classify the nature of a transaction for regulatory authorities. Use it for statutory accounting.
Operating Unit	Enter an operating unit to limit the transactions selected for pricing to only transactions that are associated with this operating unit. Operating units can indicate a location.
Fund Code	Enter a fund code to limit the transactions selected for pricing to only transactions that are associated with this fund code. Fund codes are the primary structural units of education and government accounting.
Department	Enter a department to limit the transactions selected for pricing to only transactions that are associated with this department. Use departments to track information according to a divisional breakdown of your organization. Departments can indicate who is responsible for, or affected by, a transaction.
Program Code	Enter a program code to limit the transactions selected for pricing to only transactions that are associated with this program code. Program codes track revenue and expenditures for programs within or across your organizations. Program codes can identify groups of related activities, cost centers, revenue centers, responsibility centers, and academic programs.
Class Field	Enter a class field to limit the transactions selected for pricing to only transactions that are associated with this class field. Class fields can identify specific appropriations.

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Field or Control	Description
Budget Reference	Enter a budget reference value to limit the transactions selected for pricing to only transactions that are associated with this budget reference value. Budget references can identify unique budgets, when individual budgets share budget keys and overlapping budget periods.
Product	Enter a product to limit the transactions selected for pricing to only transactions that are associated with this product. The product ChartField captures additional information that is useful for profitability and cash flow analysis by product sold or manufactured.
Affiliate	Enter an affiliate code to limit the transactions selected for pricing to only transactions that are associated with this affiliate code. Affiliate codes are used to map transactions between business units when you use a single interunit account.
Fund Affiliate	Enter a fund affiliate code to limit the transactions selected for pricing to only transactions that are associated with this fund affiliate code. Use fund affiliate codes to correlate transactions between funds when you use a single intraunit account.
Operating Unit Affiliate	Enter an operating unit affiliate to limit the transactions selected for pricing to only transactions that are associated with this operating unit affiliate. Use operating unit affiliates to correlate transactions between operating units when you use a single intraunit account.

You can use a partial wildcard in any field using a *(%)* sign at the end of the field. Partial wildcards can be used for multiple fields on the same row.

Online validations ensure a transaction row is priced only once and that it is priced using the ‘most specific’ criteria as possible depending on the values entered into the rate set. The more fields entered with values, the higher the ‘generated sequence’ used for processing and the higher priority in processing.

The transaction with exclude criteria is processed first. There are up to four processing loops depending on the rate set criteria setup:

- Exclude – Rows with Full Wildcards and Specific Values
- Exclude – Rows with Partial Wildcards
- Include – Rows with Full Wildcards and Specific Values
- Include – Rows with Partial Wildcards

Within each of these loops the higher sequence numbers are processed first, then the lower sequence numbers. After all sequences in that loop are processed the next loop is initiated with the higher sequence numbers in that loop processed first followed by the lower sequence numbers.

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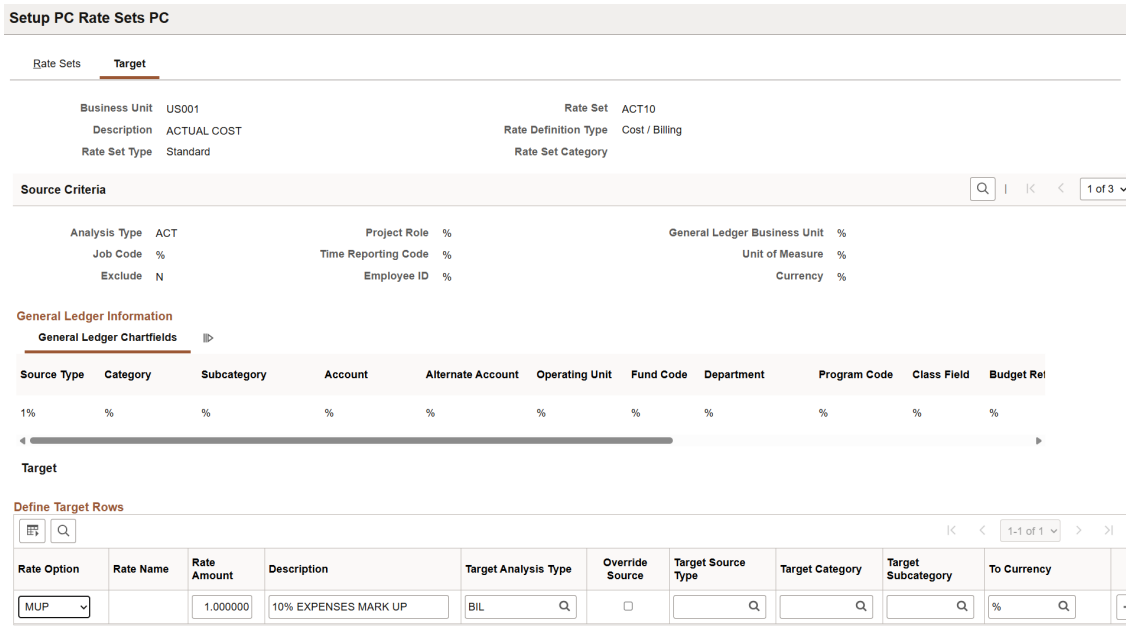
Rate Sets - Target Page

Use the Rate Sets - Target page (PC_RATE_DTL_LN) to define rate set target criteria to create cost, billing, or revenue rows.

Navigation:

- **Setup Financials/Supply Chain**, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Setup PC Pricing Rate Set Cat**, and then **Target**
- Click the **Target** link on a row in the **Define Criteria for Incoming Transactions** grid on the Rate Sets page.

This example illustrates the fields and controls on the Rate Sets - Target page.



The ChartField values that you define for the source row on the Rate Sets page appears on the Rate Sets - Target page for reference.

You can associate each source row with multiple target rows.

> **Note**
>
> The target definition is disabled for the source rows marked as *Exclude* and identified as *Y* on the **Exclude** field. If a target definition is defined for a source row and then the Exclude checkbox is selected, you need to either delete the target defintion or uncheck the Exclude checkbox to save the rate set.

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Field or Control	Description
Sequence Number	Displays the sequential rate target number assigned by the system from the Rate Variance History page. This value uniquely identifies the target sequence row and is updated incrementally each time a new active rate is added. The active target sequence and associated rate appears on this page. This option appears if you have selected Enable Variance for the Rate Set.
History	Click to access the Rate Variance History page for the target row to enter new variance rates. Access to this page is based on your security access. This link appears if the Target Analysis Type is in the PSCST analysis group on the Project Costing Installation Integration Options page. You cannot edit a rate amount on this page for target rows with a rate option of Bill at Cost (NON), Activity Bill Rate (ABI), or Activity Cost Rate (ACO).

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Field or Control	Description
Rate Option	Select an option to specify how the system derives the rates for the corresponding target row. These factors affect the list of rate options that are available for selection: • Some rate options are available only if you integrate with other PeopleSoft applications. For example, if you use PeopleSoft Maintenance Management, you can select the *WBI* and *WCO* rate options to use the work order labor bill and cost rates. If you use PeopleSoft Program Management, you can select the *ABI* and *ACO* rate options to use the activity labor resource rates that appear on the Program Management Resources by Activity page. • If you use PeopleSoft Program Management, the available rate options are also based on the rate types that are specified for the business unit. For example, if the business unit specifies that you can use only rates by employee for cost and bill rates, then the *JBI, JCO, RBI,* and *RCO* rate options will not appear for selection. Rate options are: • *ABI:* Activity Resource Bill Rate applies the resource bill rate that appears on the Resources by Activity page and sets the Target amount equal to: Source transaction quantity × Activity resource bill rate × Target rate amount Activity resource bill rates are stored in the Bill Rate field (BILL_RATE) in the Project Activity Team Member table (PROJ_ACT_TEAM). If no bill rate is defined for a resource on the Resources by Activity page or if the bill rate is zero, the Pricing engine uses the resource's bill rate from the Resources page for the project. The *ABI* rate option is available only if you use PeopleSoft Program Management, and it is not supported for variance pricing. • *ACO:* Activity Resource Cost Rate applies the resource cost rate on the Resources by Activity page and sets the target amount equal to: Source transaction quantity × Activity resource cost rate × Target rate amount Activity resource cost rates are stored in the **Cost Rate** field (COST_RATE) in the Project Activity Team Member table (PROJ_ACT_TEAM). If no cost rate is defined for a resource on the Resources by Activity page or if the cost rate is zero, the Pricing

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Field or Control	Description
	engine uses the resource's cost rate from the Resources page for the project. The *ACO* rate option is available only if you use PeopleSoft Program Management, and it is not supported for variance pricing. • *AML:* Mark Up/Down Labor uses the signed percentage amount in the **Labor %** field on the Project Definitions - Rates page to determine the markup or markdown value. This option is available only if you use PeopleSoft Proposal Management. • *AMN:* Mark Up/Down Nonlabor uses the signed percentage amount in the **Non-Labor %** field on the Project Definitions - Rates page to determine the markup or markdown value. This option is available if you use PeopleSoft Proposal Management. • *AMT:* Quantity Rate sets the target amount equal to: Source row transaction quantity × Rate set-specific rate × Target row rate amount You must enter a value in the **To Currency** field if you select the *AMT* rate option. • *CRC:* Custom Cost Rate applies the customized rate that is selected in the Rate Name field. When rates are applied to the source amount (Source Amount is selected in the Apply Rates to field on the Define Custom Rates page), then the target amount is calculated as source transaction amount x custom cost markup on the custom rate table x target rate for the row. When rates are applied to the source quantity (Source Quantity is selected in the Apply Rates to field on the Define Custom Rates page), then the target amount is calculated as source transaction quantity x custom cost rate on the custom rate table x target rate for the row. • *CRB:* Custom Bill Rate applies the customized rate that is selected in the Rate Name field. When rates are applied to the source amount (Source Amount is selected in the Apply Rates to field on the Define Custom Rates page), then the target amount is calculated as source transaction amount x custom billing markup on the custom rate table x target rate for the row. When rates are applied to the source quantity (Source Quantity is selected in the Apply Rates to field on the Define Custom Rates page), then the target amount is calculated as source transaction quantity x custom billing rate on the custom rate table x target rate for the row.

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Field or Control	Description
	• *EBI:* Employee Bill Rate (as defined on the Rates by Employee page), which sets the target amount equal to: Source row transaction quantity × Employee-specific bill rate × Target row rate amount • *ECO:* Employee Cost Rate (as defined on the Rates by Employee page) sets the target amount equal to: Source row transaction quantity × Employee-specific cost rate × Target row rate amount • *FIX:* Fixed Amount sets the target amount equal to the rate amount defined on the rate set. • *JBI:* Job Code Bill Rate (defined on the Rates by Job Code page) sets the target amount equal to: Source row transaction quantity × Job code bill rate × Target row rate amount • *JCO:* Job Code Cost Rate (defined on the Rates by Job Code page) sets the target amount equal to: Source row transaction quantity × Job code cost rate × Target row rate amount • *MUP:* Markup Rate marks up the transaction amount by the value in the **Rate Amount** field. • *NON:* Carries the source amount from the source transaction directly to the target row. • *RBI:* Role Bill Rate (defined on the Rates by Role page) sets the target amount equal to: Source row transaction quantity × Role bill rate × Target row rate amount For target rows with a rate option of *RBI*, the role bill rate is based on the role fulfilled by the employee on the activity team. If no role exists for the employee on the activity team, the process uses the employee's role on the assignment schedule if PeopleSoft Program Management is installed. Finally, if no role exists for the employee on the assignment schedule, the process uses the employee's role on the project team. • *RCO:* Role Cost Rate (as defined on the Rates by Role page) sets the target amount equal to: Source row transaction quantity × Role cost rate × Target row rate amount For target rows with a rate option of *RCO*, the project role cost rate is based on the role fulfilled by the employee on the activity team, assignment schedule (if

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Field or Control	Description
	PeopleSoft Program Management is installed), or project team, in that order. • *TBI:* Tools Bill Rate (as defined on the PeopleSoft Maintenance Management Technician Workbench - Tools Usage page: Cost Information tab), which sets the target amount equal to: Source row transaction quantity × Tools bill rate × Target row rate amount This option is available if you use PeopleSoft Maintenance Management. • *TCO:* Tools Cost Rate (as defined on the PeopleSoft Maintenance Management Technician Workbench - Tools Usage page: Cost Information tab), which sets the target amount equal to: Source row transaction quantity × Tools cost rate × Target row rate amount This option is available if you use PeopleSoft Maintenance Management. • *WBI:* Work Order Labor Bill Rate To collect work order labor costs for billing, you can create a rate set that uses this rate option for the analysis type that you specify in the **Mobile Time / Expense** field on the Installation Options - Project Costing Integration page. This option is available if you use PeopleSoft Maintenance Management. • *WCO:* Work Order Labor Cost Rate To collect work order labor costs for costing, you can create a rate set that uses this rate option for the analysis type that you specify in the **Mobile Time / Expense** field on the Installation Options - Project Costing Integration page. This option is available if you use PeopleSoft Maintenance Management.
Rate Name	Select a value when *CRC* or *CRB* is selected in the Rate Option field. The custom cost rate and custom bill rate is defined on the Populate Custom Rates page. This field is available only when the rate option is CRC or CRB.
Rate Amount	Enter a multiplier that the system uses in conjunction with the rate option to calculate target rows. For example, if you select a rate option of *EBI* and enter a rate amount of *1.1*, the system multiplies the *source row transaction quantity* × *the employee's bill rate* × *1.1* to arrive at the target row amount. For variance pricing, you cannot enter rate changes directly in this field. Instead, you must use the Rate Variance History page.

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Field or Control	Description
Description	Enter a description that appears on target rows and is passed to PeopleSoft Billing for use on the invoice. Leave the field blank or enter a wildcard (the percent symbol) for the description on the source transaction to appear by default on the target transaction.
Target Analysis Type	Select an analysis type for the system to assign to target rows. Leave the field blank for the analysis type from the source transaction to appear by default on the target rows. The target analysis types that are available for selection are based on the value in the Rate Definition Type field on the Rate Sets page. **Note:** If the rate definition type is *Billing*, you may select an analysis type included in the analysis group default for billing on the Integration Options page for Project Costing. If the rate definition type is *Cost*, you may select an analysis type included in the analysis group default for Actual Cost. If the rate definition type is *Cost/Billing*, you may select from analysis groups for Actual Cost and Billing. If the rate definition type is *Revenue*, you may select from analysis types in the PSRV2 analysis group.
Override Source	Select to override the source type, category, or subcategory from the source transaction that appears by default on the target transaction. If you select this option, enter a **Target Source Type, Target Category,** or **Target Subcategory** value to use on the target rows.
To Currency	Specify the currency that the system uses to calculate the target rows. This field does not apply to government contracts, as billing and revenue recognition must take place in the contract currency. This field is required if you select the *AMT* rate option.

Variance Pricing

For variance pricing, on the Rate Sets – Target page you define the target rates that the system uses to calculate indirect costs, and access the Rate Variance History page to enter new rates for the target rows. The rate that is the most current and active rate is used to price the target row. You maintain variance pricing rates on the Rate Variance History page.

The Sequence Number and History columns appear in the Define Target Rows grid when you activate the Enable Variance option on the Rate Sets page.

Rate Plans Page

Use the Rate Plans page (PC_RATE_PLAN) to combine rate sets so that the target rows from one rate set are used to create additional target rows from the next rate set.

Navigation:

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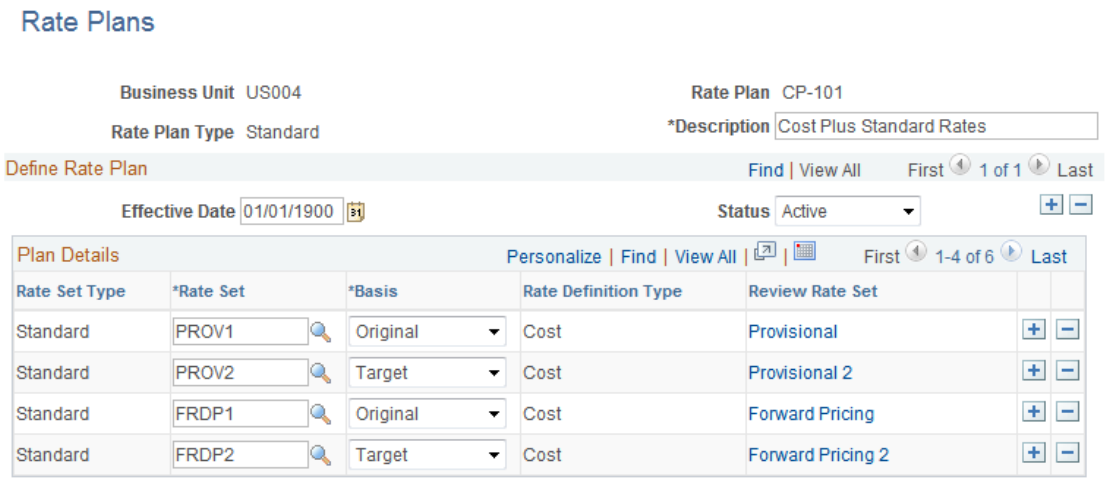
Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Setup PC Rate Plans**

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



Note

As an alternative to using this method of defining rate plans, you can use the PeopleSoft Data Migration Workbench and Application Data Sets (ADS) to move rate plan data. For additional information see Application Fundamentals: Understanding the PeopleSoft Data Migration Workbench.

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Field or Control	Description
Rate Plan Type	Select the rate plan type for this rate plan. Available values are: *Standard:* Select to create a rate plan that is generally available for pricing any contract line associated with any contract type. **Note:** Selecting the standard rate plan type automatically populates the **Rate Set Type** field as *Standard*. You cannot overwrite this value. *Contract:* Select to create a rate plan that is used to price a particular contract line. By selecting the contract rate plan type, you can select standard or contract rate set types on the rate plan and create a rate plan that meets the specific need of your contract line by combining contract-specific and standard pricing rates. For Standard Rate Plans, a warning message will be displayed when you attempt to add a Revenue rate set to a standard rate plan assigned to a contract that does not Separate As Incurred Billing and Revenue. Similar edits are in place for contract specific rate sets except the system prevents the action from occurring rather than issuing a warning.
Copy from Rate Plan	Click to access the Enter New Rate Plan Keys page, where you can copy an existing rate plan to create a new rate plan in the same business unit. **Note:** You can copy a standard rate plan to another standard rate plan. You cannot copy contract-specific rate plans. You can copy rate plans only from within the same business unit.
Rate Set Type	Displays the rate set type *(Contract* or *Standard)* from the rate set. For a contract rate plan, enter a rate set type of *Contract* or *Standard* for each rate set that you want to add to the rate plan. If you select *Contract* as the rate set type, you must select a rate set that is associated with the same contract line as the rate plan. For a standard rate plan, the system automatically populates the **Rate Set Type** field as *Standard*, and this value cannot be overridden. You can select only standard rate sets for a standard rate plan.
Rate Set	Select the rate set to include in your rate plan. You can select rate sets that are defined and active as of the effective date of the rate plan. Enter rate sets the in the order that you want the Pricing process to price the rows. Rate sets are processed in the order that you enter on this page, and only if they have a rate definition type that corresponds to the pricing options that you select on the Pricing run control page. A rate set can appear only once in a rate plan.

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Field or Control	Description
Basis	Select the basis that tells the Pricing process what source transactions to use to create the target rows for the rate set. Available options are: *Original:* The system uses the original source transactions to create target rows for the specified rate set. *Target:* The system uses the target rows that have been created on this rate plan thus far as the basis for creating the target rows for this rate set. *All:* The system uses all of the original source rows and all of the previously created target rows on the rate plan to create target rows for this rate set.
Rate Definition Type	Displays the rate definition type *(Billing, Cost, Cost/Billing,* or *Revenue)* from the rate set. The Pricing process can price transactions for costs, billing, revenue, or any combination based on the options that you select on the Pricing run control page.
Review Rate Set	Click the rate set description to access the Rate Sets page and view or modify the rate set.

Using the Data Migration Workbench for PeopleSoft Project Costing

Application Data Sets (ADS) can be used with PeopleSoft Project Costing for the purpose of moving data between development environments, test environments, and ultimately to a production environment.

This table lists the delivers ADS definitions (delivered in Data Set Designer) to support the migration of PeopleSoft Project Costing setup data.

Delivered ADS to Support PeopleSoft Project Costing	Application Data Set (ADS) Usage
Rate Sets - PC_RATE_SET	This data set includes the records that store the rate sets for PeopleSoft Project Costing. Select this data set on the **Data Migration Workbench page** to move rate sets from one database to another. For more information about the details of this data set, see Defining Rate Set Categories, Rate Sets, and Rate Plans
Rate Plans - PC_RATE_PLAN	This data set includes the records that store the rate plans for PeopleSoft Project Costing. Select this data set on the **Data Migration Workbench page** to move rate plans from one database to another. For more information about the details of this data set, see Defining Rate Set Categories, Rate Sets, and Rate Plans

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Delivered ADS to Support PeopleSoft Project Costing	Application Data Set (ADS) Usage
Custom Rates - PC_CUSTOM_RATES	This data set includes the records that store the customized rates for PeopleSoft Project Costing. Select this data set on the **Data Migration Workbench page** to move customized rates from one database to another. For more information about the details of this data set, see Setting Up Custom Rates

> **Note**
>
> The data that is entered using this component can also be loaded as an Application Data Set using the Data Migration Workbench. For more information about ADS and the Data Migration Workbench for accounting rules, see Application Fundamentals: Understanding the PeopleSoft Data Migration Workbench.

Creating Price Variances

Pages Used to Create Price Variances

Page Name	Definition Name	Usage
Rate Variance History Page	PC_VP_HISTORY	View and enter variance price rates.
Variance Pricing Page	PC_VAR_PRICING	Run the Variance Pricing process on selected rate sets.
Variance Pricing Review Page	PC_VP_REVIEW	Approve or delete rows before they are inserted in the project transaction table (PROJ_RESOURCE).

Rate Variance History Page

Use the Rate Variance History page (PC_VP_HISTORY) to view and enter variance price rates.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Pricing Structure**, and then **Rate Sets**, and then **Target**. Click the History link on the Rate Sets – Target page.

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

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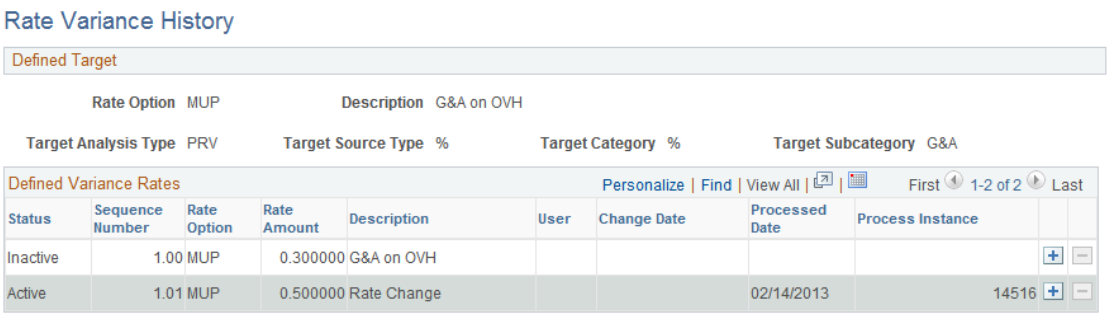


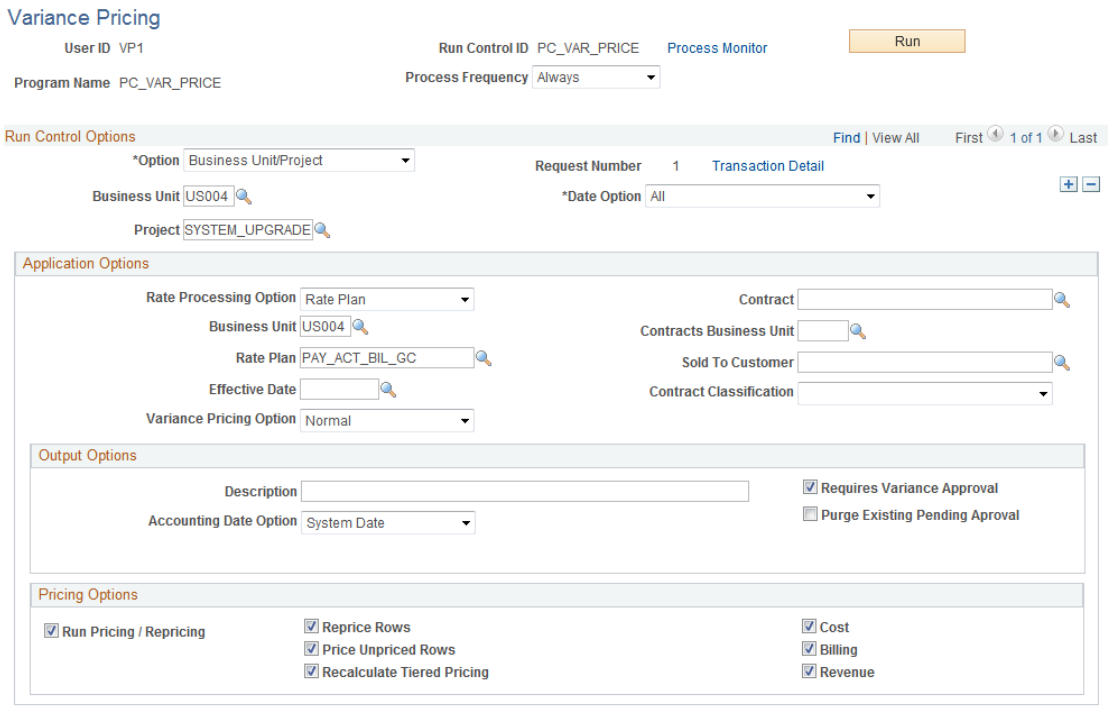
Variance Pricing Page

Use the Variance Pricing page (PC_VAR_PRICING) to run the Variance Pricing process on selected rate sets.

Navigation:

Project Costing, and then **Utilities**, and then **Variance Pricing**

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



Use this page to run the Variance Pricing process for:

- All rate sets that have Enable Variance selected on the Rate Sets page.
- Target variance rate amounts with a pending status.
- Contracts with an open or pending processing status.

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- Contracts, projects, and activities that use the rate definition on this run control page.

> **Note**
>
> To avoid generating duplicate transactions when multiple users are processing Variance Pricing, it is recommended that users select the Requires Variance Approval check box. This allows an opportunity to review the Variance Pricing transactions before sending them to the Project Costing transaction table.

Field or Control	Description
Option	Select *All, Business Unit, Business Unit/Project,* or *Business Unit/Project/Activity.* The selection in this field determines whether the Business Unit, Project, and Activity fields appear on the page.
Date Option	Select *All, Accounting Date,* or *Transaction Date.* The selection in this field determine the field used to determine the date ranges of the source transactions.
Rate Processing Option	Select *Rate Category, Rate Plan,* or *Rate Set.* The selection in this field determines whether the Rate Category, Rate Plan, and Rate Set fields appear on the page and whether the Effective Date field is enabled. If *Rate Category* or *Rate Set* is selected in this field, then all rate sets (within a rate plan) that are associated with the selected rate set, or rate category, will be processed by the Variance Pricing process.
Rate Category, Rate Plan, or **Rate Set**	Depending on the selection in the Rate Processing Option field, this field label will display Rate Category, Rate Plan, or Rate Set. All active rate categories, plans, and sets that have a rate set with the Enable Variance option selected are available for selection. Select the value for which you want to run variance pricing. The system evaluates transaction from all open contracts, projects and activities that are associated with the selected option.
Effective Date	Select the effective date of the option selected in the Rate Set or Rate Plan field. Available options are based on the effective dated rows that are defined on rate plan or rate set page. The Variance Pricing process uses the rate amounts from the selected effective date, in conjunction with the source transaction date. If this field is left blank, then all effective dated rate changes are processed.

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Field or Control	Description
Variance Pricing Option	Select *Correction* or *Normal.* This option determines the system source that is applied to the target rows when running the Variance Pricing process. Select *Correction* to indicate that the process should use the same system source that the Pricing process uses. This option should be used when you want the Variance Pricing rows to appear to be regular pricing rows. Select *Normal* to indicate that the system uses PRV for all rows.
Description	Enter a description that is applied to the new transaction rows that the Variance Pricing process creates for this run control. If left blank, then the description is not overwritten. Leave the field blank to use the rate target description. If you do not enter a description and there is no rate target description, then no description appears on the new rows that are created.
Accounting Date Option	Select the accounting date to apply to transactions that the Variance Pricing process creates. Options are: • *Original Date:* Select to use the date that the Pricing process used as the accounting date on the new transaction rows. • *System Date:* Select to use the run date as the accounting date on the new transaction rows. • *Specify Date:* Select and enter a date to use as the accounting date on the new transaction rows.
Requires Variance Approval	Select to indicate that Variance Pricing rows are not immediately inserted into the project transactions table (PROJ_RESOURCE). If selected, transactions are written to the variance pricing review table (PC_VP_REVIEW) and you must approve or delete the transactions using the Variance Pricing Review page. After approving selected transaction on the Variance Pricing Review page, you must click the Process Transactions button (on the Variance Pricing Review page) to send the approved transactions to PROJ_RESOURCE. If not selected, transactions are written directly to the project transactions table (PROJ_RESOURCE).

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Field or Control	Description
Purge Existing Pending Approval	This field is available only when the Requires Variance Approval option is selected. Select to indicate that the Variance Pricing process should delete all existing rows that are currently in the variance pricing review staging table (PC_VP_REVIEW) before inserting new rows. If not selected, then old rows are not deleted from the review table and you could potentially have duplicating rows, depending on your run control options.
Run Pricing/ Repricing	Select to indicate that the Pricing process should automatically run after the Variance Pricing rows have been created. If selected, then all other fields in the Pricing Options group box are available. If not selected, then the Pricing process is not automatically run after the Variance Pricing process.
Reprice Rows	This field is available only when the Run Pricing/Repricing option is selected. Select to indicate that the Pricing process should reprice rows after the Variance Pricing process completes.
Price Unpriced Rows	This field is available only when the Run Pricing/Repricing option is selected. Select to indicate that the Pricing process should price unpriced rows after the Variance Pricing process completes.
Recalculate Tiered Pricing	This field is available only when the Run Pricing/Repricing option is selected. Select to indicate that the Pricing process should recalculate tiered pricing after the Variance Pricing process completes.
Cost, Billing, and Revenue	This field is available only when the Run Pricing/Repricing option is selected. Select to indicate that the Pricing process should use the selected rate type when running after the Variance Pricing process completes. **Note:** These fields (Cost, Billing, and Revenue) will be available for selection irrespective of whether the **Separate Billing and Revenue** check box is selected on the contract.

> **Note**
>
> To avoid overlapping processes from running at the same time, only one Variance Pricing process, using the same parameters in these fields, can run at the same time: Business Unit, Project, Activity, and Rate Processing Option.

The Variance Pricing process completes these steps:

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1. Updates the target variance rate sequence row to active
2. Updates the rate amount and sequence number on the Rate Sets - Target page with the new active target variance row.
3. Prices rows eligible for Variance Pricing based on the new rate amount.
4. Creates new transaction rows with the system option selected in the Variance Pricing Option field.
5. (Optional) Reprices rows eligible for repricing based on the new rate amount and prices any new, unbilled, or unbooked transactions using the new rate.

Repricing cannot occur on any transaction rows that are created as a result of Variance Pricing.

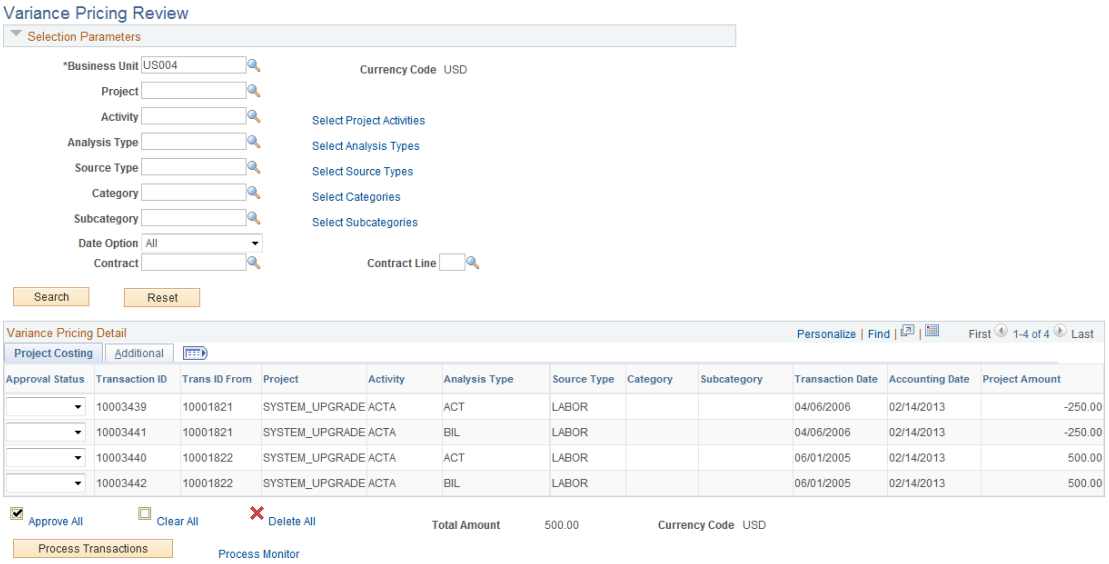
Variance Pricing Review Page

Use the Variance Pricing Review page (PC_VP_REVIEW) to approve or delete rows before they are inserted in the project transaction table (PROJ_RESOURCE).

Navigation:

Project Costing, and then **Utilities**, and then **Variance Pricing Review**

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



Transactions appear on this page if you selected the Requires Variance Approval check box on the Variance Pricing run control page. The transactions are stored in a staging table called PC_VP_REVIEW.

Use this page to approve or delete transaction rows prior to inserting them into the project transaction table (PROJ_RESOURCE).

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Selection Parameters

In the Selection Parameters section, the link to the right of the field, such as Activity, Analysis Type, and so on, allow you to select multiple values. The maximum number of values that can be selected for a field is 20.

For Activity, Analysis Type, Source Type, Category, and Subcategory, a single value (selected directly from the Variance Pricing Review page) takes precedence if you also click the link and select multiple values from the Select page.

Variance Pricing Detail

Field or Control	Description
Approval Status	Select *Approved* or *Delete* to indicate the action to which the system should take when you click the Process Transactions button.
Process Transactions	Click to process the transaction that have Approved or Delete in the Approval Status field. Approved rows will continue to be processed through the Variance Pricing process and inserted into the project transaction table (PROJ_RESOURCE). Delete rows are deleted from the PC_VP_REVIEW table. However, if you rerun the Variance Pricing process using the same parameters, then rows that were previously deleted may reappear on this page. Rows with no value in the Approval Status field remain in the variance pricing review table (PC_VP_REVIEW). However, if you rerun the Variance Pricing process with the same run control parameters, duplicate rows are added to the variance pricing review table. This is because Variance Pricing does not take the rows that are in the review table into account when generating variance rows.

Defining Tiered Pricing

Pages Used to Define Tiered Pricing

Page Name	Definition Name	Usage
Transaction Identifiers Page	PC_TRANS_IDENTIFY	Define transaction identifiers for use in the Tiered Pricing feature.
PeopleSoft Contracts: Tiered Pricing Template Page	PC_TIER_TEMPLATE	Define a tiered pricing template that facilitates defining tiered pricing for contract lines. You define tiered pricing templates in the PeopleSoft Contracts system.

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Transaction Identifiers Page

Use the Transaction Identifiers page (PC_TRANS_IDENTIFY) to define transaction identifiers for use in the Tiered Pricing feature.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **Transaction Options**, and then **Transaction Identifiers**, and then **Transaction Identifiers**

See Transaction Identifiers.

Running the Pricing Application Engine Process

Page Used to Run the Pricing Application Engine Process

Page Name	Definition Name	Usage
Pricing Page	PC_PRICING	Run the Pricing process to price or reprice transactions.

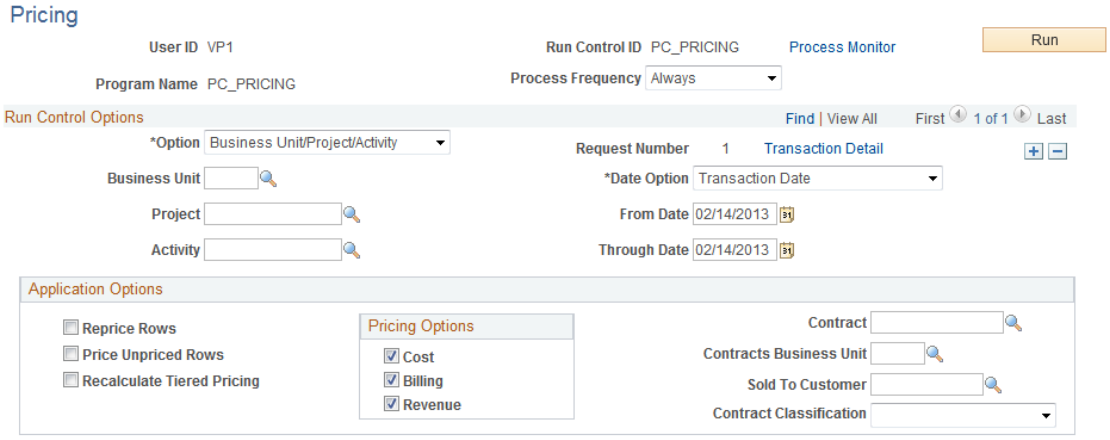
Pricing Page

Use the Pricing page (PC_PRICING) to run the Pricing process to price or reprice transactions.

Navigation:

Project Costing, and then **Utilities**, and then **Pricing**, and then **Pricing**

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



Field or Control	Description
Transaction Detail	Click to access the Transaction List page to view the transactions.

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Application Options

Field or Control	Description
Reprice Rows	Select to reprice transactions in the Project Transaction table. You can reprice transactions that have not been sent to GL, have not been billed or sent to PeopleSoft Asset Management, are not linked to an asset, or have not been used for fee calculations in PeopleSoft Contracts. When you reprice rows, the Pricing process calls the Tiered Pricing, Limits, and Sharing processes, in that order. **Note:** If a cost row generated one or more billing or revenue rows and if any of the rows in the process exist on billing or revenue fee worksheets, none of the other rows that are associated with the original cost row are eligible for repricing.
Price Unpriced Rows	Select to price unpriced cost rows in the Project Transaction table that were not previously priced by the Pricing process. **Note:** You cannot select this option to run the Pricing process if any source transaction row on the run control has been priced for any combination of cost, billing, or revenue. You can, however, select the **Reprice Rows** option as these source transaction rows are eligible for repricing.
Recalculate Tiered Pricing	Select to recalculate quantities that are eligible for tiered pricing if the original tiered pricing agreements change. When you select this option, the system selects the **Reprice Rows** option because repricing is required to recalculate tiered pricing inception-to-date amounts. Transactions that are already processed by PeopleSoft Billing or PeopleSoft General Ledger are not repriced or adjusted using a different tiered pricing adjustment; however, quantities from the source rows will be included in the correct tier so that the inception-to-date amount reflects these quantities.

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Field or Control	Description
Pricing Options	Select **Cost** (indirect and direct), **Billing,** **Revenue,** or any combination, to tell the system what kind of rows to create from the source transactions. The pricing options correspond to the rate definition types that are assigned to rate sets. **Note:** The pricing engine checks to see if the **Separate As Incurred Billing and Revenue** check box is selected on the contract to determine if revenue rows can be created or not. If you choose a run control option of *Business Unit, Business Unit/Project,* or *Business Unit/ Project/Activity,* the options that appear by default in the **Pricing Options** group box are based on the pricing options that are selected for the business unit. You can override the business unit default pricing options on the run control page.
Contract	Enter a contract ID, if applicable, to provide additional transaction search criteria.
Contracts Business Unit	Enter a contract business unit, if applicable, to provide additional transaction search criteria.
Sold to Customer	Enter a contract sold to customer, if applicable, to provide additional transaction search criteria.
Contract Classification	Enter a contract classification, if applicable, to provide additional transaction search criteria.

When you use the Pricing page to price or reprice transactions for activities that are associated with fixed fee contract lines, do not enter any contract related information in the **Application Options** group box. Activities associated with fixed fee contract lines are treated as Project Costing related pricing; therefore, entering contract related information prevents the system from picking up fixed fee data for pricing.

> **Note**
>
> This run control page is used to process transactions from all contract classifications. If you want to initiate the Pricing process for a specific set of contracts, such as government contracts, you must enter search criteria such as project, activity, contract classification, and so on, to identify the transactions to include in this run control.

Viewing Team Rates

The Project Team and Activity Team Rate Sheets provide visibility to the standard rates that are associated with each team member. Project managers can select a view to display standard rates by employee, job code, or role.

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> **Note**
>
> When the Pricing process prices cost transactions, the rate set dictates which, if any, of the standard rates are used and whether any markup or adjustment is applied to the standard rate.

Pages Used to View Team Rates

Page Name	Definition Name	Usage
Project Team Standard Rate Sheet Page	PC_TEAM_RATES	View team roles, job codes, project availability dates, and cost and bill rates by employee, project role, and job code for project team members.
Activity Team Standard Rate Sheet Page	PC_ACT_TEAM_RATES	View the cost and bill rates for activity team members by employee, job code, or role.

Related Topics

- Understanding the Pricing Process
  This topic discusses:

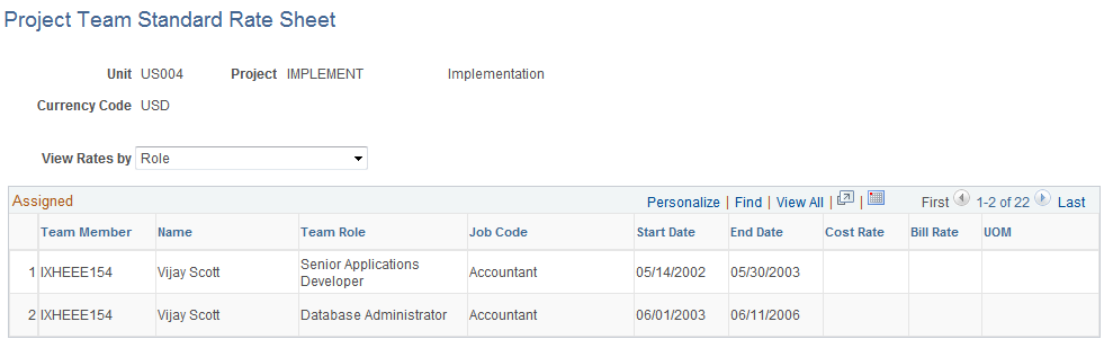
Project Team Standard Rate Sheet Page

Use the Project Team Standard Rate Sheet page (PC_TEAM_RATES) to view team roles, job codes, project availability dates, and cost and bill rates by employee, project role, and job code for project team members.

Navigation:

Project Costing, and then **Project Definitions**, and then **Team**, and then **Team**. Click the **Team Rates** link on the Project Definitions - Team page.

This example illustrates the fields and controls on the Project Team Standard Rate Sheet page. You can find definitions for the fields and controls later on this page.



Project team members appear on this page if you defined a project team role for the member.

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Field or Control	Description
View Rates by	Select *Employee*, *Job Code*, or *Role* to view different project team rates.
Cost Rate and **Bill Rate**	Displays the cost and bill rates associated with the team member and the option that you select in the **View Rates by** field. The system converts these rates as necessary to the currency of the business unit.

Related Topics

- Understanding Team Staffing in PeopleSoft Project Costing
  Project managers can staff a project and its related activities from the Project Definitions - Team page. The Project Definitions - Team page maintains a central view of all project assignments and scheduling. You can assign team members to multiple schedules in a variety of project roles.
- Creating Project and Activity Teams
  To create project and activity teams, use the Project Team component (PROJECT_TEAM1).
- Viewing and Modifying Activity Teams
  To view and modify activity teams, use the Project Activity Team component (PROJ_ACT_TEAM).

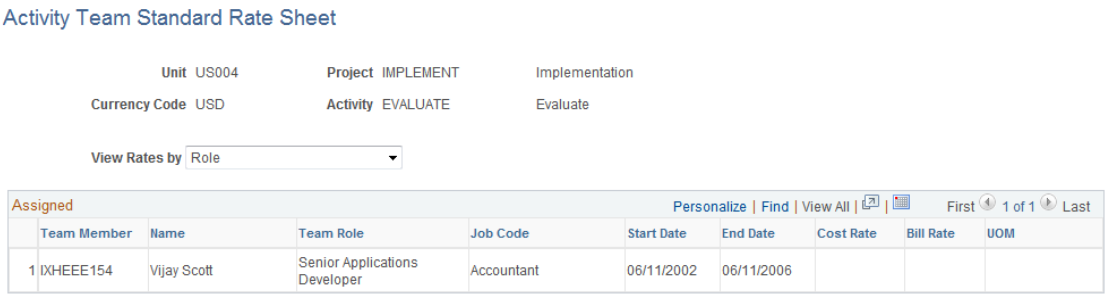
Activity Team Standard Rate Sheet Page

Use the Activity Team Standard Rate Sheet page (PC_ACT_TEAM_RATES) to view the cost and bill rates for activity team members by employee, job code, or role.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Team**, and then **Team**. Click the **Activity Team Rates** link on the Activity Definitions - Team page.

This example illustrates the fields and controls on the Activity Team Standard Rate Sheet page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
View Rates by	Select *Employee*, *Job Code*, or *Role* to view different activity team rates.

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Field or Control	Description
Cost Rate and **Bill Rate**	Displays the cost and bill rates associated with the activity team member and the option that you select in the **View Rates by** field. The system converts these rates as necessary to the currency of the business unit.

Related Topics

- PeopleSoft Program Management: Understanding Resource Tools
- PeopleSoft Program Management: Adding and Modifying Project Resources
- PeopleSoft Program Management: Adding and Modifying Activity Resources

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16

Distributing Funding

Understanding Funds Distribution

This topic discusses:

- The Funds Distribution process.
- Options used to generate fund distribution rows.
- The funds distribution rule.

The Funds Distribution Process

Project costs can be distributed among multiple funding sources. The Funds Distribution Application Engine (PC_FND_DIST) process distributes funding by applying funds distribution rules to incoming transactions and assigning costs accordingly. You can use the Pricing Application Engine (PC_PRICING) process to price funded rows for billing purposes.

> **Note**
>
> The Funds Distribution process applies funds distribution rules only to incoming transactions and funds distribution burden targets

This diagram illustrates the Funds Distribution process:

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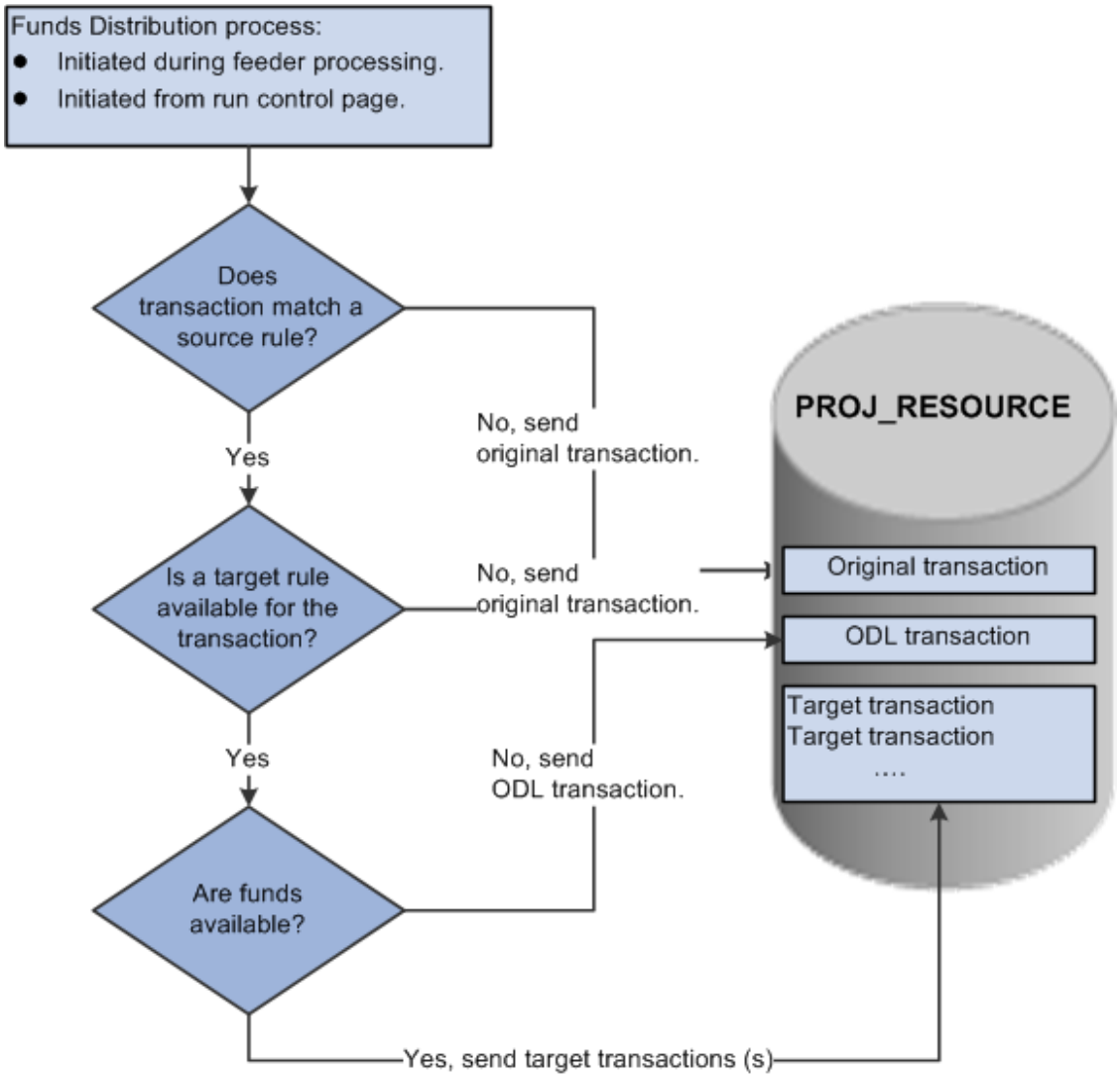

The Funds Distribution process consists of three primary steps:

1. Match a transaction to a source rule.

   If a matching source rule is not found, the original transaction is maintained in PROJ_RESOURCE without further processing.

   If a matching source rule is found, the process proceeds to the next step.

2. Determine if a target rule is available for the transaction.

   If a target rule is not available for the transaction, the original transaction is maintained in PROJ_RESOURCE without further processing.

   If a target rule is available for the transaction, the process proceeds to the next step.

3. Check for available funds.

   If available funds are not found, the system creates an over the distribution limit (ODL) transaction in PROJ_RESOURCE.

   If available funds are found, the system creates target distributions.

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Group Target Definition

The Group Target Definitions option when selected indicates that all the source rules in a group can be associated to a single target definition. For example, to group source rules with several different budget references you can assign a single target group ID on the Funds Distribution – Source page to the required rules. Any number of source rules can be grouped together by assigning the same target group ID. This option can be used if the grouping of source rules is more complex than grouping different analysis types.

The Group Target Definitions option can be defined at many levels and provided by default to the next level, where you have the option to override it. The Group Target Definition option can be defined at these levels:

- The installation level.
- The business unit level.
- The project level.
- The funds distribution rule level.

See Understanding Transaction-Related Control Data.

Process Transactions

The Funds Distribution process allows you to process source transactions that have not been distributed or to reprocess transactions that were previously distributed. When running the Funds Distribution process to reprocess source transactions, the old target distributions are deleted and recreated if the original cost row and all target rows have not been:

- Sent to PeopleSoft Billing, General Ledger, or Asset Management.
- Linked to an asset.
- Used in fee calculations for government contracts.
- Created by the Variance Pricing process.

Budget Checking

The Funds Distribution process budget checks rows if the **Budget Check** option is selected on the Funds Distribution - Target page. Target distributions are created for a single source row, but all the related target distributions from the same source transaction are treated as a group.

The Project Costing to Commitment Control (PC_TO_KK) process is called from the Funds Distribution process, and a unique journal ID is created for target distribution rows. This action enables the system to identify all related target distribution rows if one row in the group fails the budget checking process.

If one or more of the target distribution rows fail the budget checking process, then the entire group of rows is held from additional processing until all the rows pass budget checking.

You use the Funds Budget Exceptions page to view rows that have failed budget checking.

> **Note**
>
> Budget overrides are not allowed for funds distribution budget checking exceptions.

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Balancing

A Balancing check box is available on the Funds Distribution - Target page. This check box ensures that the sum of all target amounts, for a target sequence, for a given source, equals the source amount. It also ensures that the distributed amount does not exceed the threshold for the sequence.

> **Note**
>
> Only one row can be selected within each sequence.

A default analysis type can be determined on the Installation Options – Project Costing Integration page. The system automatically selects the Balancing check box for the target distribution row with the default analysis type on the Funds Distribution - Target page. The check box can be deselected on this page, and you can select the check box for a different target distribution row.

On the Funds Distribution - Target page, the selected distribution receives the balance of the source amount if the system has to round the target distributed amounts to maintain the distribution percentage.

For example, if FDS is selected on the Installation Options – Project Costing Integration page, and FDS is added to the Target page, then the system automatically selects the FDS row as the balancing row. If more than one FDS row is added to the sequence, the system automatically selects the first FDS row as the balancing row.

If you have not defined a balancing analysis type on the Installation Options – Project Costing Integration page, and do not select one when adding target distributions, then the system will automatically select the last target row as the balancing row. You can change this selection on the Target page.

Selecting this option ensures that the sum of the target amounts, for any given source, equals the amount of the source row. It also ensures that the distributed amount does not exceed the threshold for the sequence. This is done by attributing any differences, due to rounding, to the distribution that has the Balancing check box selected.

Options Used to Generate Fund Distribution Rows

You can generate target distribution rows in the Project Transaction table (PROJ_RESOURCE) in four ways based on the funds distribution source criteria:

- Access the Funds Distribution run control page and run the Funds Distribution (PC_FND_DIST) process for an activity, project, business unit, or all business units.

  Use this method to generate target distribution rows for source transactions that exist in the Project Transaction table.

- Access the Load Transactions run control page and send transactions to the Project Transaction table by using the Transaction Loader Application Engine process (PC_INTFEDIT).

  When you run the Transaction Loader process, the system automatically uses the Funds Distribution process to evaluate the eligible incoming transaction rows and create target distribution rows in the Project Transaction table. To use this method, define the funds distribution rules for the appropriate activities and enable funds distribution on the Installation Options - Project Costing Integration page.

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- Access the Add Transaction page and enter transactions for an activity for which you have defined funds distribution rules.

  Click **Process Transactions** on the Add Transaction page to initiate the Transaction Loader process, which uses the Funds Distribution process to create target distribution rows for transactions that meet the source criteria.

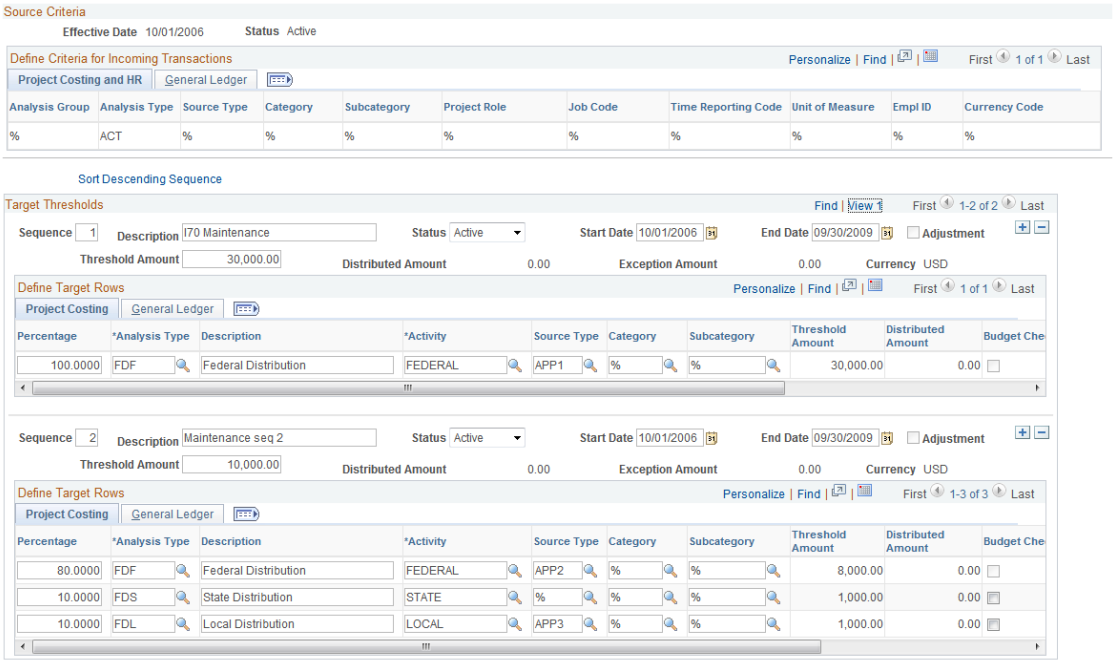
- Access one of the cost collection pages and initiate one of the feeder processes.

  The feeder processes use the Funds Distribution process to create target distribution rows for transactions that meet the source criteria.

The Funds Distribution Rule

Each effective dated rule defines the type of costs to distribute and how to distribute them. Sequences are defined to represent a specific approved or funded amount. Distribution percentages and ChartFields are specified for each sequence.

This example illustrates the fields and controls on the Example of multiple threshold amount on target. You can find definitions for the fields and controls later on this page.



In this example, 100 percent of the first 50,000 USD of costs are distributed to activity FED and the other ChartFields selected based on sequence 1. Costs from 50,000 USD to 100,000 USD are distributed between the FED and STATE-General Fund activities using the percentages specified in the **Rate Amount** fields under sequence 2. A cost that exceeds the total threshold amount of 100,000 USD is treated as an ODL amount. The system creates a separate row for the excess amount and assigns the row an analysis type of ODL.

The system can split transactions between more than one sequence. Therefore, in this example, if the first transaction processed is 55,000 USD, then the first 50,000 USD is distributed according to sequence 1 and the remaining 5,000 USD is distributed according to sequence 2.

If a transaction causes the distributed amount of the highest active sequence to exceed its threshold, the amount that does not exceed the threshold is distributed and the remainder is

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treated as an ODL amount. A separate row with an analysis type of ODL is created for the overage.

Distributing Credits

The system distributes credit amounts beginning with the highest active sequence that has a remaining distributed amount, until that amount is exhausted. The system then identifies the next highest active sequence that has a remaining distributed amount and applies additional credit amounts, until that amount is exhausted. The system continues this process until the entire credit amount is distributed. If the system does not find a total distributed amount that is greater than or equal to the remaining credit, it creates a negative ODL amount.

> **Note**
>
> Credits are distributed independently of all related transactions. For example, if a prepayment is distributed to sequence one and the threshold is reached prior to distributing the subsequent credit and voucher, then the credit and voucher could be distributed to a different sequence. This could result in the credit and voucher being distributed to different ChartFields than the prepayment.

Understanding Accounting for Distributions

This topic discusses:

- Accounting rules.
- The Process Project Accounting process.
- The Journal Generator process.

Accounting Rules

The Accounting Rules component (PSA_ACCT_SETUP) is used to define accounting entries for distributions that are created by the Funds Distribution process. Accounting entries record the movement of a charge from the ChartField combination to which the source transaction (such as a voucher) was originally recorded to the ChartField combinations that are specified on the target distribution rows.

Create an accounting rule for each analysis type that is defined on the Funds Distribution - Target page, excluding analysis types that have the same ChartField combination as the original source transaction. Also, define an accounting rule for the reversal analysis type (FDR) if reversals are selected on any distribution row.

For more information about accounting rules:

See Accounting Rules.

See Defining Accounting Rules.

Example of Accounting Rule Setup

This example illustrates how accounting rules are used to generate accounting entries.

This table lists the ChartFields for a voucher that is processed in accounts payable for 100 USD and sent to Project Costing:

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Analysis Type	Fund	Account	Project	Activity	Amount
ACT	Fed	600000	A	Design	100

This table lists the target rows that are created for the voucher in PROJ_RESOURCE during the Funds Distribution process:

Analysis Type	Fund	Account	Project	Activity	Amount	Comment
FDF	Fed	600000	A	Design	70	
FDS	State	600000	A	Design	20	
FDL	Local	600000	A	Design	10	
FDR	Fed	600000	A	Design	-20	This amount reverses the amount of the FDS row from the Fed Fund ChartField.
FDR	Fed	600000	A	Design	-10	This amount reverses the amount of the FDL row from the Fed Fund ChartField.

This table illustrates how the accounting rule selection criteria for the state fund target distribution row (FDS) should be set up to generate accounting entries:

Analysis Type	Project	Activity	Source Type	Category	Subcategory
FDS	%	%	%	%	%

This table illustrates how the accounting rule entry values for the state fund target distribution row (FDS) should be set up to generate accounting entries:

DR/CR	Account Type	Fund	Account	All GL ChartFields	Project
Debit	Exp	%	%	%	Source
Credit	Cash	%	100000	%	Source

This table illustrates how the accounting rule selection criteria for the local fund target distribution row (FDL) should be set up to generate accounting entries:

Analysis Type	Project	Activity	Source Type	Category	Subcategory
FDL	%	%	%	%	%

This table illustrates how the accounting rule entry values for the local fund target distribution row (FDL) should be set up to generate accounting entries:

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DR/CR	Account Type	Fund	Account	All GL ChartFields	Project
Debit	Exp	%	%	%	Source
Credit	Cash	%	100000	%	Source

This table illustrates how the accounting rule selection criteria for the reversal target distribution rows (FDR) should be set up to generate accounting entries:

Analysis Type	Project	Activity	Source Type	Category	Subcategory
FDR	%	%	%	%	%

This table illustrates how the accounting rule entry values for the reversal target distribution rows (FDR) should be set up to generate accounting entries:

DR/CR	Account Type	Fund	Account	All GL ChartFields	Project
Debit	Cash	%	100000	%	Source
Credit	Exp	%	%	%	Source

The Process Project Accounting Process

To process the accounting rule that is defined for each analysis type, run the Process Project Accounting process. To ensure that the correct accounting rule is processed, verify that each analysis type for which an accounting rule exists is included in the accounting costs analysis group (PSCST).

For more information about the Process Project Accounting process:

See Process Project Accounting Process.

See Processing Transactions Using Accounting Rules.

The Journal Generator Process

Use the CAPCCOST accounting entry definition to create journals from the project transactions that are created by the Funds Distribution process. This accounting entry definition selects only accounting entries that contain an analysis type that is included in the PSCST analysis group.

Related Topics

- Application Fundamentals: Understanding Journal Generator
- Application Fundamentals: Setting Up for Journal Generator
- Application Fundamentals: Generating Journal Entries

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Setting Up Funds Distribution

Pages Used to Set Up Funds Distribution

Page Name	Definition Name	Usage
Application Fundamentals: Installation Options - Project Costing Page	INSTALLATION_PCINT	Determine funds distribution options in the **Funds Distribution Options** group box. Enable the funds distribution option.
Project Costing Options Page	BUS_UNIT_OPT_PC	Determine the **Group Target Definitions** option for the business unit. This step is optional.
Project Definitions - Project Costing Definition Page	PROJECT_GEN_01	Determine the **Group Target Definitions** option for the project. This step is optional.
Activity Definitions - Definition Page	PROJECT_ACTIVITY	Determine the **Participating** option for the activity. This step is optional.
Funds Distribution - Source Page	PC_FND_DIST	Define source criteria for funds distribution. You can identify the cost transactions for activities that are eligible for distribution.
Funds Distribution - Target Page	PC_FND_DIST_LN	Define target distribution rules.

Steps to Set Up Funds Distribution

To set up fund distribution, complete these steps:

1. Determine the Funds Distribution Options on the Installation Options - Project Costing Integration page.
2. Select the **Group Target Definitions** option on the Project Costing Business Unit Options page.

   This step is optional.
3. Select the **Group Target Definitions** option on the Project Costing Definition page.

   This step is optional.
4. Deselect the **Participating** option for an activity on the Activities Definition - Definition page if the activity is to be excluded from the Funds Distribution process.

   This step is optional.
5. Define source criteria on the Funds Distribution - Source page.

   Use this page to identify the types of transactions that are eligible for distribution
6. Define target criteria on the Funds Distribution - Target page.

   Use this page to set up rules that determine how target distributions are generated, including ChartField values that are assigned and the percentage of the cost that each target receives.

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Funds Distribution - Source Page

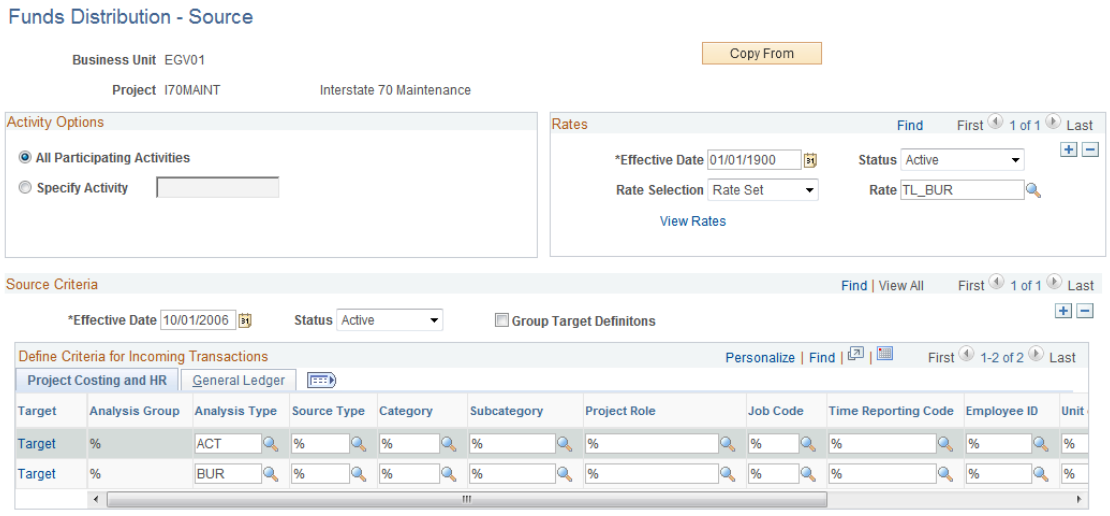
Use the Funds Distribution - Source page (PC_FND_DIST) to define source criteria for funds distribution.

You can identify the cost transactions for activities that are eligible for distribution.

Navigation:

Project Costing, and then **Funds Distribution**, and then **Funds Distribution**

This example illustrates the fields and controls on the Funds Distribution - Source page. You can find definitions for the fields and controls later on this page.



Use the Funds Distribution - Source page to identify the source criteria for funds distribution.

Field or Control	Description
Copy From	Click to access the Enter Project/Activity to Copy Distribution From page. Use this page to copy funds distribution rules from another activity within the same business unit. Only current rows that are active are copied. Analysis types are copied. History rows are not copied. Adjustment sequence rows are not copied. Rate plans and rate sets are not copied. Threshold amounts and distributed amounts are set to zero for target rows.

Activity Options

A funds distribution rule can be defined for all activities in the project or for specific activities in the project.

An activity cannot be changed after amounts are distributed. However, the rule can be inactivated.

If a rule exists for a project with the **All Participating Activities** option selected, you cannot create a rule for a specific activity. Similarly, if a rule exists for a specific activity, you cannot

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create another rule for the same project that has the **All Participating Activities** option selected.

Field or Control	Description
All Participating Activities	Select to indicate that the rule applies to all activities in a project.
Specify Activity	Select to indicate that the rule applies to one participating activity in a project. When selected, enter an activity ID in the field to the right.

Rates

Specifying a rate plan or rate set is optional. If one is specified and is active for a rule, the system runs the Pricing (PC_PRICING) process to generate the appropriate target burden transactions before running the Funds Distribution process. This ensures that the target burden transactions are included as source criteria for the Funds Distribution process. In this situation, include the target analysis types from your rate set on the Funds Distribution source page.

Field or Control	Description
Effective Date	Enter a date that determines when the rate plan or rate set is to be used for burdening.
Status	Select *Active* or *Inactive.*
Rate Selection	Select *Rate Plan* or *Rate Set.*
Rate	Select a rate plan or a rate set, depending on the selection in the **Rate Selection** field.
View Rates	Click to access the rate plan or rate set definition pages in update mode.
View/Add Rates	Click to access the rate plan or rate set definition pages in add mode.

Source Criteria

Enter an effective date and status that applies to the source transactions. The status can be *Active* or *Inactive.* However, only one source criteria rule can have an active status.

> **Note**
>
> Inactivating a rule prevents additional source transactions from being distributed to funding sources.

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Field or Control	Description
Group Target Definitions	The initial value of this field defaults from the Project Costing Definition page. You can override the value on this page. Select to indicate that the funding source rules can be grouped manually. Each target definition can be associated to a set of rules. Deselect to indicate that each funding source rule will be associated with separate target definition. This check box will be display-only if the child target definition has a distributed amount not equal to zero.

Define Criteria for Incoming Transactions

The funding source can be represented by a combination of Project Costing, Human Resource (HR), and General Ledger ChartFields. To define Project Costing and HR values, select the Project Costing and HR tab. To define General Ledger ChartFields, select the GL tab.

Field or Control	Description
Target	Click to access the Funds Distribution - Target page for the corresponding row.
Target Group ID	Enter suitable target group IDs based on which source rules will be grouped together. You can enter any alphanumeric combination for the Target Group ID. You can also enter sequential number such as 1, 2, and 3. Each ID can be assigned to multiple source rules. This field is only visible if Group Target Definitions checkbox is selected. It is a required field. However it will be display-only if there are any child target definitions found with a distributed amount not equal to zero. If Group Target Definitions checkbox is not selected then this field is hidden and each source rule will have separate target definition.
Analysis Group	This field defaults to '%'. For a particular source rule you can only enter a value for either Analysis Group or Analysis Type. Source rules will be grouped together based on the analysis group or analysis type you enter. If source rule is entered by analysis group then the corresponding target definition will apply to all the analysis types within that analysis group.
Analysis Type	Select the analysis types of the source transactions, which are used by the Funds Distribution process for this rule. When defining a new rule, the analysis types that are included in the Funds Distribution Defaults (PSDEF) analysis group are used to populate these rows. You can delete or add analysis types.

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Enter source type, category, subcategory, project rule, job code, time reporting code, employee ID, unit of measure, and currency code combinations that identify the Project Costing and HR source criteria for cost transactions that are eligible for distribution for this activity or activities. Use the percent symbol (%) as a wildcard if all values apply. Similar to rate sets, partial wild cards are not supported.

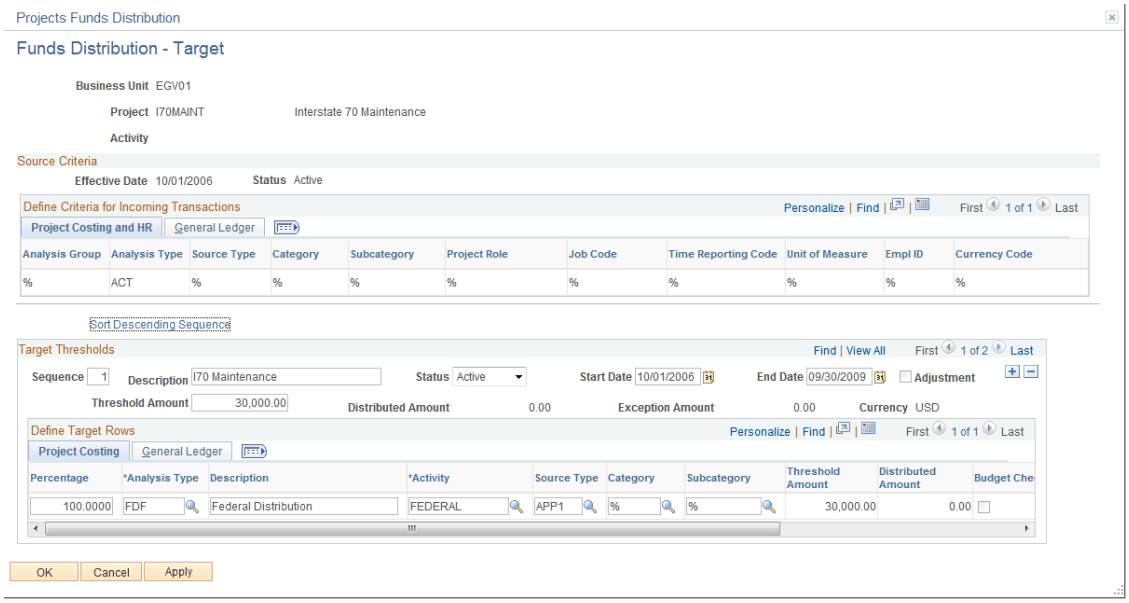
Funds Distribution - Target Page

Use the Funds Distribution - Target page (PC_FND_DIST_LN) to define target distribution rules.

Navigation:

Click the **Target** link for a source criteria row from the Funds Distribution - Source page.

This example illustrates the fields and controls on the Funds Distribution - Target page. You can find definitions for the fields and controls later on this page.



Use this page to specify the maximum amount of source transactions that can be distributed to a funding source. You also define the percentages that the system uses to calculate the distributed amounts.

> **Warning**
>
> After transactions are distributed for a rule, some fields on the Funds Distribution - Target page cannot be modified for that rule. However, target distributions can be deleted and recreated if neither the original cost row nor any of its target rows have been distributed to PeopleSoft Billing, General Ledger, Asset Management, linked to an asset, used in fee calculations for government contracts, or created by the Variance Pricing process.

For more information about how to correct distribution errors:

See Correcting Distribution Errors.

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Source Criteria

This section displays the settings that were defined on the Funds Distribution - Source page.

Define Criteria for Incoming Transactions

If the **Group Target Definitions** checkbox is selected on the Funds Distribution – Source page then all the source rules grouped under the particular Target Group ID are listed in display-only mode. If this checkbox is not selected then Target Group ID field is hidden and source rules with separate target definitions are displayed on this page.

Target Thresholds

This section enables you to define multiple rows. Each row determines the sequence that the target rules are applied to the source transaction.

Field or Control	Description
Sort Ascending/Descending Sequence	Click to sort the threshold sequence in ascending or descending order.
Sequence	Enter a sequence number that indicates the order in which the Funds Distribution process applies the funding when a valid source transaction is processed. Each active sequence represents an approved amount of available funding to which costs can be distributed. Different distribution percentages and ChartFields can be defined for each sequence.
Status	Select *Active* or *Inactive*. This field enables you to inactivate a particular sequence within a rule but have all other sequences remain active. You may need to do this if an incorrect appropriation was used. If the status is changed to inactive, you can reactivate it only if the distributed amount for the sequence equals zero. When the **Adjustment** check box is selected, the status does not apply to the row.

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Field or Control	Description
Adjustment	Select to indicate that the sequence row is an adjustment sequence. When this option is selected, the target **Percentage** distribution field is not available for entry. However, the **Threshold Amount** and **Distributed Amount** fields are available for entry. This option enables you to synchronize the manual adjustments from Billing with the funds distribution rules and reports. Adjustment sequences are not recognized and are not processed when the Funds Distribution process runs. When the threshold amount and distributed amount for a sequence is equal zero, the **Adjustment** check box can be changed. For more information about applying adjustments: See Applying Adjustments to the Funds Distribution Rule.
Start Date	Enter a beginning date that the sequenced rule can be used to distribute source transactions. Costs with an accounting date or transaction date that is greater than or equal to this date are eligible to be distributed using this sequence, provided it is active and the threshold amount is not fully distributed. If the **Adjustment** check box is selected, then the start date does not apply to the row.
End Date	Enter an ending date that represents when the sequenced rule is no longer used to distribute source transactions. Costs with an accounting date or transaction date that is less than or equal to this date (and greater than or equal to the start date) are eligible to be distributed using this sequence, provided it is active and the threshold amount is greater than zero. This field is optional. If the **Adjustment** check box is selected, then the end date does not apply to the row.

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Field or Control	Description
Threshold Amount	Enter an amount that represents the maximum amount of source transactions that may be distributed to funding sources according to the distribution rules defined for the sequence. This amount typically represents an approved amount of funding for which project costs can be billed. If different distribution rules are needed for different amounts of funding, then multiple sequences can be defined. If the **Update Threshold Amounts** field on the Installation Options - Project Costing Integration page is selected, then this field can be modified after costs have been distributed against the threshold. However, the threshold amount cannot be less than the distributed amount. If the **Update Threshold Amounts** field on the Installation Options - Project Costing Integration page is not selected, then this field cannot be modified after costs have been distributed against the threshold. If additional funding is received, a new sequence must be added to create additional distribution rows.
Distributed Amount	Displays the amount of costs distributed for the sequence. The distributed amount cannot exceed the threshold amount. This amount includes all exceptions that have been budget checked and are outstanding.
Exception Amount	Displays the amount of costs distributed that have been held from additional processing due to budget checking exceptions. These transactions have not been added to PROJ_RESOURCE. Use the Funds Budget Exceptions page to view and re-budget check these transactions. If a target distribution for a source transaction fails the Budget Checking process, all of the target distributions for that source transaction are held until the error is resolved. Therefore, the exception amount may contain target distributions that failed budget checking and those that did not. For example, if three target distributions are created for a source transaction and one failed budget checking, then all three are held from additional processing and are included in the **Exception Amount** field.

Define Target Rows - Project Costing

The fields on the Project Costing tab and on the General Ledger tab determine how distribution rows are created and written to PROJ_RESOURCE.

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Field or Control	Description
Percentage	Enter the percentage of the source transaction that is to be distributed to the specified funding source. You can enter as many rows as needed because project costs can be distributed among multiple funding sources. The sum of the percentages specified for a sequence must equal 100 percent. This field is not available when the **Adjustment** check box is selected.
Analysis Type	Select an analysis type that is used to identify the distributed funds during the Funds Distribution process. For example, FDF (Funds Distribution Federal) indicates that the amount is sourced by federal funds and FDS (Funds Distribution State) is sourced by state funds. **Note:** For each incoming transaction that meets the source criteria, the system creates a target row in the Project Transaction table. The row has an amount that is equal to the defined percentage of the cost and the ChartField values that are defined for the row.
Activity	Enter the activity ID that is associated with the target distribution row. The value in this field can be: • The same activity that is specified on the rule. • A different activity that overrides the activity on the source transaction. • A wild card value (a percent sign) to inherit the same activity as the source transaction.
Source Type, **Category**, and **Subcategory**	Perform one of these actions: • Enter a value for the system to assign to the resulting target distribution rows. • Enter the wildcard value (a percent sign) for the target distribution row to inherit the same value as the source transaction row. • Leave the field blank for the target distribution rows to inherit a blank value
Threshold Amount	Displays the percent of the total threshold amount for the source. This is the portion of the overall threshold for the sequence that is allocated to the funding source.
Distributed Amount	Displays the total costs that are distributed to the funding source specified for the row.

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Field or Control	Description
Budget Check	Select to indicate that the resulting distribution is to be budget checked. This option should be selected if the commitment control budget for the target distribution is different than the commitment control budget for the source transaction. This field is available only when these conditions exist: • The **Enable Commitment Control** option is selected for Project Costing on the Installation Options - Products page. • The analysis type for the row has a value of *Actuals and Recognized* in the **Commitment Control Amount Type** field on the Analysis Type page.
Reversals	Select to indicate that reversals are allowed for the row. This option generates an accounting entry that reverses the impact of the original source transaction in the amount of the distribution. Use this option to synchronize distribution transactions in Project Costing with accounting entries in the general ledger. When this option is selected, the Funds Distribution process generates a second row containing a FDR (Funds Distribution Reversal) analysis type. This row has the same amount (but opposite sign) as the selected row and the same ChartFields from the source row. If the **Budget Check** check box is selected, then the **Reversals** check box is automatically selected. If the **Allow Generate Reversals** option on the Installation Options - Project Costing Integration Options page is selected, then this check box is available.
Balancing	Select one row in a sequence to indicate that this target distribution row should be used by the system if rounding differences are encountered during the Funds Distribution process (PC_FND_DIST).

Define Target Rows - General Ledger ChartFields

Use this page to set up distribution rules between different General Ledger ChartField values

The system derives the set IDs for the general ledger ChartFields from the default general ledger business unit that is defined on the integration template for the project. The Funds Distribution process does not use ChartField overrides on the Funds Distribution - Target page if the SetID for the general ledger business unit on the source transaction does not match the derived SetID. If the set ID for the general ledger business unit on the source transaction does not match the derived SetID, then the ChartField value on the source transaction is used for the distribution.

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Managing Funds Distribution

Pages Used to Manage Funds Distribution

Page Name	Definition Name	Usage
Funds Distribution Page	RUN_PC_FND_DIST	Run the Funds Distribution process.
Over Distribution Limits List Page	PC_FND_ODL_LIST	View ODL rows.
Funds Budget Exceptions Page	PC_FND_INTFC_EXCPT	Correct budget exceptions.

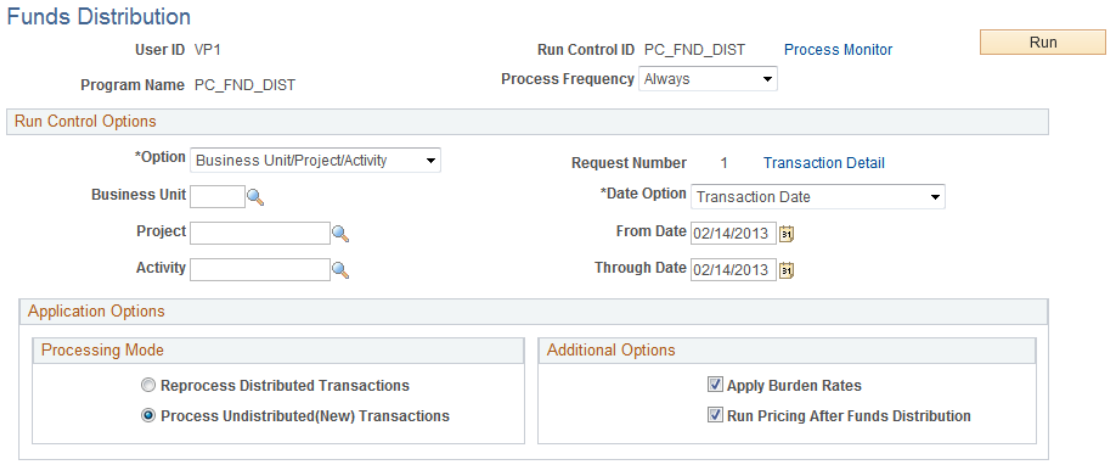
Funds Distribution Page

Use the Funds Distribution page (RUN_PC_FND_DIST) to run the Funds Distribution process.

Navigation:

Project Costing, and then **Funds Distribution**, and then **Process Funds Distribution**

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



The Funds Distribution process distributes transactions brought into PeopleSoft Project Costing according to the funds distribution rules. Funds distribution rules are defined on the Funds Distribution - Source and Funds Distribution - Target pages.

The Funds Distribution process can be used to:

- Process new source transactions that have not been distributed by the Funds Distribution process.
- Redistribute source transactions that have been distributed in a previous run of the Funds Distribution process.

Source transactions are processed in this order:

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1. Credit ODL rows that are created when an insufficient distributed amount is available to apply to a credit.

   ODL rows are processed only if the **Process Undistributed (New) Transactions** field is selected.

2. Credit source transactions that meet the criteria on the Funds Distribution - Source page.
3. Debit ODL rows.

   ODL rows are processed only if the **Process Undistributed (New) Transactions** field is selected.

4. Debit source transactions that meet the criteria on the Funds Distribution - Source page.

Field or Control	Description
Option	Select an option to process transactions for all activities or for specific ones. Available values are: • *All:* Select to process all transactions. • *Business Unit:* Select to specify transactions for the selected business unit. • *Business Unit/Project:* Select to specify transactions for the selected business unit and project. • *Business Unit/Project/Activity:* Select to specify transactions for the selected business unit, project, and activity.
Transaction Detail	Click to access the Transaction List page to view the transactions that will be processed.
Date Option	Select an option to specify which transactions to include in this run control. Available options are: • *All:* The process selects all eligible rows, regardless of the accounting date or transaction date. • *Accounting Date:* The process selects eligible rows with an accounting date that falls within the date range that you specify for this run control. • *Transaction Date:* The process selects eligible rows with a transaction date that falls within the date range that you specify for this run control.
From Date and **Through Date**	Enter the date range of the eligible transactions. These fields appear if you select *Accounting Date* or *Transaction Date* in the **Date Option** field.

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Field or Control	Description
Reprocess Distributed Transactions	Select to reprocess, or redistribute, a source row that was previously processed by Funds Distribution. You can only reprocess source transactions that have not been sent to PeopleSoft General Ledger, Billing, or Asset Management, are not linked to an asset, or have not been used for fee calculations in PeopleSoft Contracts. When the Funds Distribution process finds available funds, it sends target distribution rows to PROJ_RESOURCE. Use this option if you determine that the target distribution rows are incorrect or should be deleted. Before selecting this option, you should correct the associated funding rule. Then select this option and rerun the process. The target distribution rows that were previously generated are deleted, and new target distribution rows are generated based on the corrected funding rule. For additional information about deleting and correcting distribution errors: See Correcting Distribution Errors. When this option is selected, the **Run Pricing After Funds Distribution** option should also be selected to ensure that transactions that were previously priced are priced again. **Note:** If a rule is inactivated and you select this option to reprocess source rows, then the system deletes any target distributions for the rule that have not been sent to PeopleSoft General Ledger, Billing, or Asset Management, linked to an asset, used in fee calculations for government contracts, or created by the Variance Pricing process.
Process Undistributed (New) Transactions	Select to process source rows that were not previously processed by the Fund Distribution process. Use this option if: • You received transactions before defining an applicable rule on the Funds Distribution pages and you want to distribute those transactions. • The **Run for Incoming Transactions** option is not selected on the Installation Options - Project Costing Integration page. When the **Run for Incoming Transactions** option is not selected, the Funds Distribution process does not run automatically. • You want to process and distribute existing ODL rows without reprocessing existing source transactions.

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Field or Control	Description
Apply Burden Rates	Select to run the Pricing process (PC_PRICING) before running the Funds Distribution process (PC_FND_DIST). The Pricing process generates burden rows, which can be the source transactions for the Funds Distribution process. This option is valid when the Rates section is defined on the Funds Distribution - Source page.
Run Pricing After Funds Distribution	Select to run the Pricing process after the Funds Distribution process. Select this option if you want to generate pricing rows for the target distributions that are created by the Funds Distribution process. The Pricing Options (Cost, Billing, and Revenue) from the Project Costing Options Page are used to determine which Pricing target rows are generated

Note

When the **Run for Incoming Transactions** option is selected on the Installation Options - Project Costing Integration page, the Funds Distribution process is automatically called during a feeder process. When this occurs, the Funds Distribution process runs with the **Apply Burden Rates** and the **Run Pricing After Funds Distribution** options enabled.

Warning

If you generate pricing rows for target distributions that are generated by the Funds Distribution process and you price the source transaction, the same transaction could be double-billed.

Over Distribution Limits List Page

Use the Over Distribution Limits List page (PC_FND_ODL_LIST) to view ODL rows.

Navigation:

Project Costing, and then **Funds Distribution**, and then **Funds Distrib Over the Limit**

This example illustrates the fields and controls on the Over Distribution Limits List page. You can find definitions for the fields and controls later on this page.

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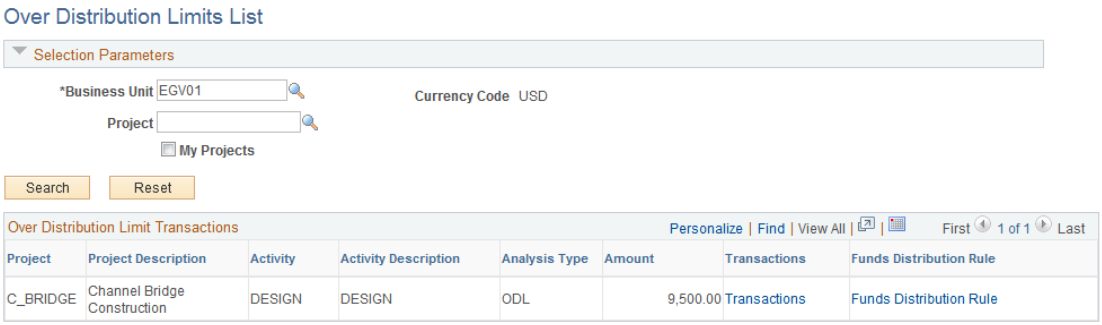

This page displays ODL transactions if the Funds Distribution process is unable to distribute a source transaction due to insufficient threshold amounts. These rows can be from a selected business unit, a specific project, or the list of projects from the My Projects list of the user. The results are summarized at the project and activity levels.

To correct ODL rows, use one of these methods:

- Increase the threshold amount on the associated funds distribution rule and rerun the Funds Distribution process.

  To do this, the **Update Threshold Amounts** option must be selected on the Installation Options - Project Costing Integration page. Increase the amount in the **Threshold Amount** field on the Funds Distribution - Target page, and then run the Funds Distribution process with the **Reprocess Distributed Transactions** option selected.

  To process the ODL rows without affecting existing distributions, select the **Process Undistributed (New) Transactions** option on the Funds Distribution run control page.

- Create a new target sequence with additional funds for the associated funds distribution rule and rerun the Funds Distribution process with the **Reprocess Distributed Transactions** option selected.

  To process the ODL rows without affecting existing distributions, select the **Process Undistributed (New) Transactions** option on the Funds Distribution run control page.

- Inactivate the sequence from which the ODL rows were generated on the Funds Distribution - Target page and rerun the Funds Distribution process with the **Reprocess Distributed Transactions** option selected.

  Use this option to delete all distributions that are associated with that sequence and that have not been processed beyond the Pricing process. You can achieve the same result for all sequences by inactivating the entire rule on the Funds Distribution - Source page and rerunning the Funds Distribution process with the **Reprocess Distributed Transactions** option selected.

Field or Control	Description
Transactions	Click to access the Transaction List page to view individual transactions that total the summarized amount. **Note:** The Transaction List page shows all transactions for the project or activity, not just ODL rows. Use additional search parameters on the Transaction List page to limit the results to ODL rows.
Funds Distribution Rule	Click to access the Funds Distribution - Target page.

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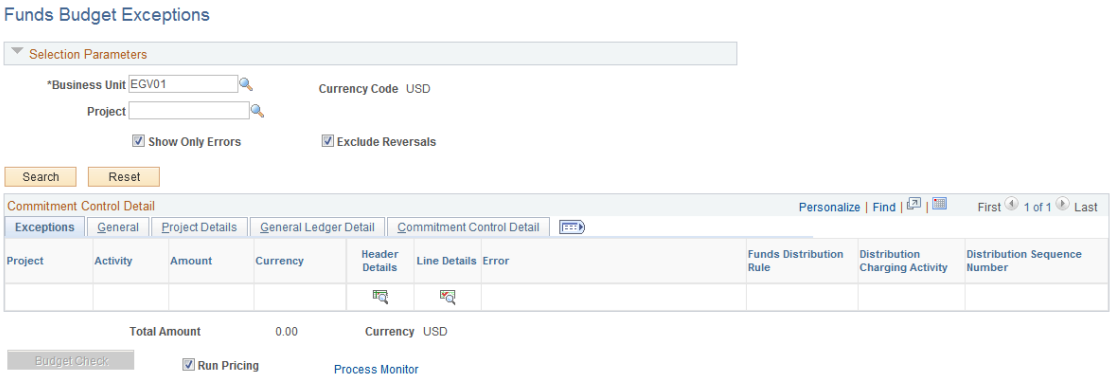
Funds Budget Exceptions Page

Use the Funds Budget Exceptions page (PC_FND_INTFC_EXCPT) to correct budget exceptions.

Navigation:

Project Costing, and then **Funds Distribution**, and then **Funds Distrib Budget Exception**

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



Use this page to view budget checking errors that result from the Funds Distribution process.

To correct budget errors, use one of these methods:

- Modify the sequence of the applicable funds distribution rule using the **Funds Distribution Rule** link.

  This link accesses the Funds Distribution - Target page, where you can modify the ChartFields to refer to a budget with sufficient available balance for the distribution to pass budget checking or where you can deselect budget checking for the target distribution.

  Rerun the Funds Distribution process with the **Reprocess Distributed Transactions** option selected. The Budget Checking process (PC_TO_KK) is automatically called by the Funds Distribution process if the **Budget Check** option is selected on the Funds Distribution - Target page. The (PC_FND_BDCHK) process is called only via the **Budge Check** button on the Funds Budget Exceptions page.

- Increase the budget in Commitment Control or project budgeting and then click the **Budget Check** button on the Funds Budget Exceptions page.

  This action calls the Funds Budget Checking (PC_FND_BDCHK) process, which calls the Budget Checking process (PC_TO_KK) and removes the row from this page if the row passes budget checking.

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Field or Control	Description
Show Only Errors	This option is automatically selected as a default. Deselect this option to show all distribution rows in the group that contain the error. When selected, the related rows that do not contain an error do not appear. When a budget checking error occurs on a target distribution row, all related distribution rows that are generated as part of the same group as the erroneous row are held as exceptions until the error is corrected.
Exclude Reversals	This option is automatically selected as a default. Deselect this option to include reversal transactions from funds distribution.
Header Details and **Line Details**	Click to access the Commitment Control Header Exceptions page and the Commitment Control Line Exceptions page.
Funds Distribution Rule	Click to access the Funds Distribution - Target page for the sequence of the transaction.
Budget Check	Click to run the Funds Budget Checking process (PC_FND_BDCHK), which calls the Budget Checking process (PC_TO_KK). Use this button to rerun budget checking after resolving one or more errors.
Run Pricing	This option is automatically selected as a default. When selected, the Pricing process runs after the Budget Checking process when you click the **Budget Check** button.

> **Note**
>
> Budget overrides are not allowed for any budget checking exception in PeopleSoft Project Costing.

Correcting Distribution Errors

This topic discusses:

- Correcting Errors.
- Applying Adjustments to the Funds Distribution Rule.

Page Used to Correct Distribution Errors

Page Name	Definition Name	Usage
Project Billing Adjustments Page	PC_FND_UNAPPL_BAJ	View Billing adjustments.

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Correcting Errors

Depending on when an error is detected, you can correct it in different ways.

Distribution Rows are In Process

Distribution rows that are in process have not been distributed to PeopleSoft General Ledger, Billing, or Asset Management, linked to an asset, used in fee calculations for government contracts, or created by the Variance Pricing process. This is typically the case if target distributions are not processed beyond the Pricing process (PC_PRICING). To correct distribution errors that are in process, follow these steps:

1. Update the funds distribution rule.
2. Rerun the Funds Distribution process with the **Reprocess Distributed Transactions** option selected.

Another option to correct distribution errors is to delete and recreate target distributions that are in process. Target distributions can be deleted and recreated as long as the original cost row and any of its target rows are in process. To do this, follow these steps:

1. Change the **Status** field of the applicable sequences to *Inactive* on the Funds Distribution - Target page.
2. Run the Funds Distribution process to reprocess the source transactions by selecting the **Reprocess Distributed Transactions** option.

   This action removes the distribution rows from PROJ_RESOURCE.
3. Define a new sequence with the correct distribution field values on the Funds Distribution - Target page.

   If the **Distributed Amount** field is *0.00,* then you can activate and modify the existing sequence.
4. Rerun the Funds Distribution process to generate the new distribution rows by selecting the **Process Undistributed (New) Transactions** option.

Distribution Rows Are on a Temporary Bill

If an error is detected after the distribution rows are sent to Billing and a temporary bill is created, then you can:

1. Delete the temporary bill using the Billing Worksheet.
2. Update the funds distribution rule.
3. Rerun the Funds Distribution process with the **Reprocess Distributed Transactions** option selected.

Distribution Rows Are on a Finalized Bill

If an error is detected after the bill is finalized, then a billing adjustment can be created to correct the error.

For example, if the error is an incorrect Projects ChartField value such as source type, category, or subcategory, and only that value needs to be corrected, then create an adjustment using the PeopleSoft Billing - Invoice Maintenance page. This action credits the original bill lines that are in error and rebills the line using the correct Projects ChartField values.

If correcting the error requires different percentage splits on the funds distribution rule or if the bill amount is incorrect, you should correct the error in the appropriate feeder application such

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as Project Costing or Accounts Payable rather than making a billing adjustment. This action ensures that the distributed amounts on the funds distribution rule are updated.

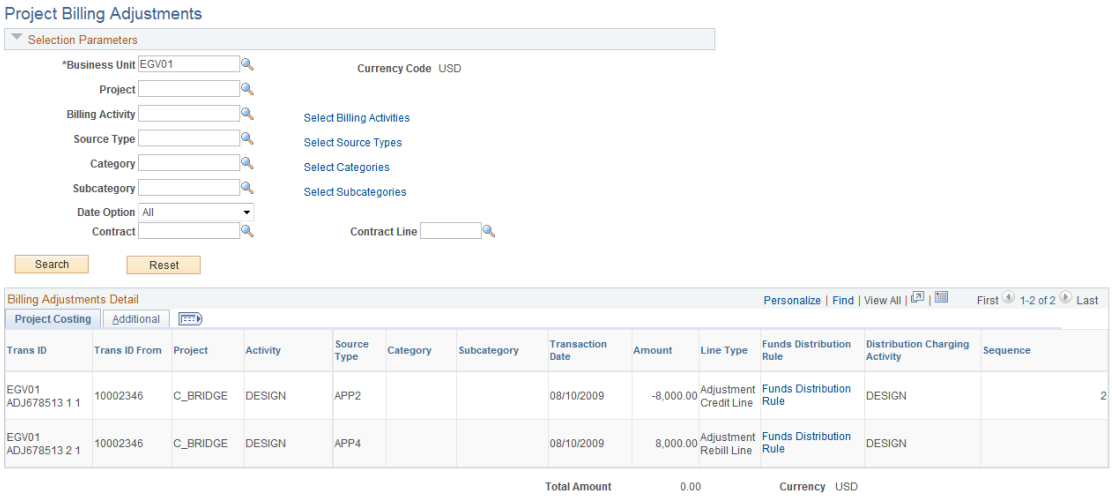
Project Billing Adjustments Page

Use the Project Billing Adjustments page (PC_FND_UNAPPL_BAJ) to view Billing adjustments.

Navigation:

Project Costing, and then **Funds Distribution**, and then **Funds Distrib Bill Adjustments**

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



Use this page to view credits, credit and rebills, net adjustments, and ChartField changes that are made from the PeopleSoft Billing - Invoice Maintenance component.

In the Selection Parameters section, you can enter up to 20 selections for the **Billing Activity,Source Type,Category,** and **Subcategory** fields.

Field or Control	Description
Line Type	Displays the adjustment type from PeopleSoft Billing.
Funds Distribution Rule	Click this link to access the Funds Distribution - Target page.
Distribution Charging Activity	Displays the activity ID of the source transaction that resulted in the adjustment of the original invoice if it differs from the billing activity of the original invoice. This difference can occur if a funds distribution rule distributes costs to a target activity.
Distribution Sequence Number	Displays the funds distribution sequence number of the original invoice that is being adjusted. This sequence number is shown for only adjustment and adjustment credit line types.

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Applying Adjustments to the Funds Distribution Rule

If an adjustment is made to project-related invoices in PeopleSoft Billing, then the adjustment is not automatically reflected in the **Threshold Amount** and **Distributed Amount** fields for the corresponding funds distribution rule.

To ensure that the funded (threshold) and distributed amounts reflect these adjustments on the Funds Distribution Report, you must create an adjustment sequence on the Funds Distribution - Target page. The adjustment sequence allows you to enter a distributed and threshold amount that reflects the net effect of adjustments displayed on the Project Billing Adjustments page. To do this, follow these steps:

1. Create a new sequence on the Funds Distribution - Target page and select the **Adjustment** check box.
2. Enter the same ChartFields as the billing adjustments for which you are entering the adjustment sequence on the Funds Distribution - Target page.

When the Funds Distribution Report calculates funded and distributed amounts for a project, it includes the adjustment sequences that have matching ChartFields. In this way, report totals reflect any adjustments that are made in Billing.

For example, an invoice that has five lines of 20 USD each (5 × 20 = 100) is finalized with incorrect source type (appropriation) values. You use the Billing - Invoice Maintenance page to issue a credit and rebill the invoice. The system sends these adjustments to Project Costing, and they appear on the Project Billing Adjustments page. Create an adjustment sequence for the appropriate funds distribution rule containing two rows:

- The first row, for –100 USD, is the adjustment for the credit.

  This row references the incorrect source type as shown on the credit adjustment lines on the Project Billing Adjustments page.
- The second row, for 100 USD, is the adjustment for the rebill.

  This row references the correct source type as shown on the rebill adjustment lines on the Project Billing Adjustments page.

> **Note**
>
> Rows that are entered as an adjustment sequence are not stored on the Project Transaction table (PROJ_RESOURCE). Their only purpose is to adjust funded (threshold) and distributed amounts for adjustments that are entered in Billing.

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Tracking Procurement Costs

Understanding Procurement Costs

In PeopleSoft Project Costing you can track procurement costs as they move through the system from requisitions to purchase orders to vouchers. The following steps and diagram illustrate this movement:

1. Requisition transactions that you enter in PeopleSoft Project Costing can be picked up by PeopleSoft Purchasing and turned into requisitions.

   Requisitions can also be entered into PeopleSoft Purchasing by other means and pulled into PeopleSoft Project Costing for tracking.

2. When a requisition is created, PeopleSoft Purchasing can determine if the requested item exists in Inventory.

   If the item is an inventory item, a demand can be created, posted, and picked up by Inventory for fulfillment. If the requested item is not an inventory item, a purchase order can be created.

3. When the purchase order is approved and dispatched, it can be brought into PeopleSoft Project Costing as a committed cost.

   The purchase order can also be sent to the appropriate vendor.

4. When a voucher is received from the supplier, it can be matched, approved, and posted in PeopleSoft Payables.

   The voucher information can then be brought into PeopleSoft Project Costing as an actual cost.

5. Orders entered in Order Management can be pulled into PeopleSoft Project Costing and tracked.

This diagram illustrates tracking procurement costs as they move through the system from requisitions to purchase orders to vouchers.

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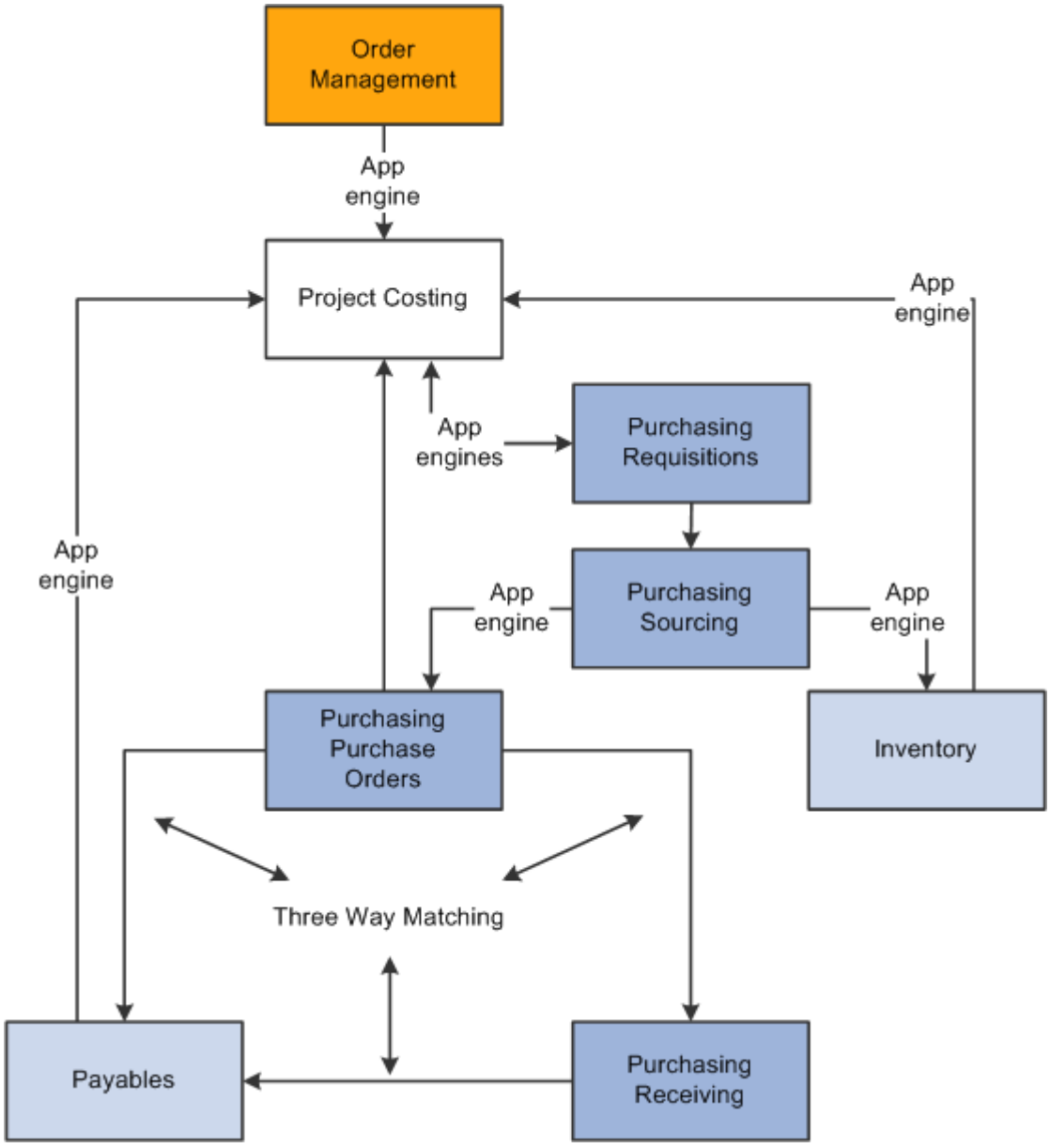

Understanding Integration with PeopleSoft Purchasing

PeopleSoft Project Costing integrates requisitions, purchase orders, or both. PeopleSoft Project Costing also provides a process to adjust purchase requisitions and purchase orders.

This topic discusses:

- Integrating requisitions from PeopleSoft Project Costing to PeopleSoft Purchasing.
- Integrating requisitions from PeopleSoft Purchasing to PeopleSoft Project Costing.
- Integrating purchase orders from PeopleSoft Purchasing to PeopleSoft Project Costing.

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Integrating Requisitions from PeopleSoft Project Costing to PeopleSoft Purchasing

These actions occur to create requisition transactions in PeopleSoft Project Costing:

- The Purchasing Requisition Loader process uses the Project Transaction table (PROJ_RESOURCE) to determine which transactions have an analysis type of *REQ* and a PO Distribution Status field (PO_DISTRIB_STATUS) value of *1.*

  The process copies those transactions into PeopleSoft Purchasing, creates requisitions, and adds a requisition ID to each requisition transaction on the Project Transaction table.

  > **Note**
  >
  > The Purchasing Requisition Loader process can group multiple transactions into a single requisition by item ID, project ID, activity ID, source type, and so on.

- The PO distribution status of the requisition transactions on the Project Transaction table changes to *4* (processed) to indicate that the transactions have been processed by PeopleSoft Purchasing.

Related Topics

- PeopleSoft Purchasing: Understanding the Purchasing Requisition Loader Application Engine Process (PO_REQLOAD)
- PeopleSoft Purchasing: Loading Requisitions

Integrating Requisitions from PeopleSoft Purchasing to PeopleSoft Project Costing

These actions occur to integrate requisitions originating in PeopleSoft Purchasing into PeopleSoft Project Costing:

1. After you create requisitions in PeopleSoft Purchasing they are posted to the Requisition Distribution table (REQ_LN_DISTRIB).

   If a requisition originated in PeopleSoft Project Costing, it is replaced when the requisition is approved in PeopleSoft Purchasing.

2. The Purchasing to Project Costing Application Engine process (PC_PO_TO_PC) uses the Requisition Distribution table to determine which requisitions have a value of *N* (not distributed) for the PC (Project Costing) Distribution Status field (PC_DISTRIB_STATUS).

   This indicates that the requisition did not originate in PeopleSoft Project Costing, and has not been picked up by Project Costing.

3. The Purchasing to Project Costing process pulls these requisition lines into PeopleSoft Project Costing.

   Requisitions appear as transactions with the analysis type that is specified in the **Requisitions** field (AN_TYPE_PO_REQ) on the Installation Options - Project Costing Integration page. The **Requisitions** field default value is *REQ.*

   If you use PeopleSoft Maintenance Management, the process also imports the work order business unit, work order ID, task ID, work order resource type, and work order resource line into the Project Transaction table.

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4. The PC Distribution Status field value on the Requisition Distribution table changes to *D* (distributed) for each transaction that is copied into PeopleSoft Project Costing.

Related Topics

- PeopleSoft Maintenance Management: Integrated Product Setup Considerations
- PeopleSoft Maintenance Management: Shared Products Setup Considerations

Integrating Purchase Orders from PeopleSoft Purchasing to PeopleSoft Project Costing

You can integrate purchase orders that originate in PeopleSoft Purchasing into PeopleSoft Project Costing. The Purchasing to Project Costing process identifies the distribution lines in the PO Line Accounting Entries table (PO_LINE_DISTRIB) that are eligible for integration to Project Costing. Rows in the PO Line Accounting Entries table are eligible for integration if they:

- Contain values for the required project-related ChartFields.
- Have a **PC Distribution Status** status of *N* (not distributed).

The Purchasing to Project Costing process updates the PC distribution status to *D* (distributed) and copies the transactions to PeopleSoft Project Costing. If you use PeopleSoft Maintenance Management, the process also imports the work order business unit, work order ID, task ID, work order resource type, and work order resource line into the Project Transaction table.

Purchase orders appear as transactions with the analysis type that is specified in the **Purchase Orders** field (AN_TYPE_PO_PO) on the Installation Options - Project Costing Integration page. The **Purchase Orders** field default value is *COM.*

Related Topics

- PeopleSoft Maintenance Management: Integrated Product Setup Considerations
- PeopleSoft Maintenance Management: Shared Products Setup Considerations

Understanding Requisition and Purchase Order Adjustments

In PeopleSoft Project Costing you can adjust requisitions and purchase orders based on the purchasing adjustment options that are set up during installation, combined with the options and parameters that you select when you run the Purchasing Adjustment Application Engine process (PC_POADJUST).

This topic discusses:

- Purchasing adjustments.
- Adjustment calculations.
- Nonrecoverable value-added tax (VAT) amounts in purchase order reversals.
- Using commitment control to generate reversals.

Purchasing Adjustments

The Purchasing Adjustment process in PeopleSoft Project Costing can perform four types of actions:

- Reverse requisitions.

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- Reverse purchase orders (commitments).
- Close purchase orders.
- Close individual purchase order lines.

The Purchasing Adjustment process can create reversal rows to reduce the outstanding commitment for individual purchase order lines or for the entire purchase order. This gives you the option of closing each purchase order line separately and creating reversal rows only for the closed or canceled lines, or creating reversal rows for an entire closed or canceled purchase order.

The Purchasing Adjustment process uses two analysis groups that are delivered as system data:

- *POADJ* (purchasing adjustments): Identifies the mapping used by the Application Engine process for requisition and purchase order reversals.
- *OPENC* (open commitment balance): Determines open commitment balances for closed purchase order adjustments.

Review these analysis groups for changes if any additional analysis types are configured.

Adjustment Calculations

This section contains tables that illustrate examples of different adjustment calculations resulting from options that are specified during installation on the Installation Options - Project Costing page and during the adjustment process.

See Application Fundamentals: Installation Options - Project Costing Page.

Requisition Reversals

These tables show adjustment calculations produced by using three different requisition reversal options—REQ Rate, COM Amount, and REQ Total. In each case, a summarized reversal row is created by grouping the requisition, item, and unit of measure. The analysis type that is used in this process is specified in the **Requisition Reversals** field (AN_TYPE_PO_RRV) on the Installation Options - Project Costing Integration page. The **Requisition Reversals** field default value is *RRV.*

This table lists requisition and purchase order details:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
REQ	10	EA	100	10
COM	5	EA	35	7

This table lists an adjustment produced by using the REQ Rate option:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
RRV	5	EA	50	10

> **Note**
>
> If the REQ and COM rows have different units of measure, the total REQ quantity and amount is used for the reversal.

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This table lists an adjustment produced by using the COM Amount option:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
RRV	5	EA	35	not applicable

> **Note**
>
> If the COM amount exceeds the REQ amount, the total REQ amount is used. If the REQ and COM rows have different units of measure, the total COM quantity and amount is used for the reversal.

This table lists an adjustment produced by using the REQ Total option:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
RRV	10	EA	100	10

> **Note**
>
> The same options apply to requisitions that are reversed by inventory costs that fulfill the requisition.

Purchase Order (Commitment) Reversals

These tables show adjustment calculations produced by two different purchase order reversal options—ACT Amount and COM Rate. In each case, a reversal row is created individually for each purchase order line to retain all the detail. The analysis type that is used in this process is specified in the **Purchasing Reversals** field (AN_TYPE_PO_CRV) on the Installation Options - Project Costing Integration page. The **Purchasing Reversals** field default value is *CRV.*

This table lists purchase order and voucher details:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
COM	10	EA	100	10
ACT	5	EA	35	7

This table lists an adjustment produced by using the COM Rate option:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
CRV	5	EA	50	10

> **Note**
>
> If the COM and ACT rows have different units of measure, the total COM quantity and amount is used for the reversal.

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This table lists an adjustment produced by using the ACT Amount option:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
CRV	5	EA	35	N/A

> **Note**
>
> If the ACT amount exceeds the COM amount, the total COM amount is used. If the COM and ACT rows have different units of measure, the total ACT quantity and amount is used for the reversal.

Closed Purchase Order Adjustments

When you manually cancel or close a purchase order line in PeopleSoft Purchasing, the system creates a reversal row to reduce the outstanding commitment. The analysis type that is used in this process is specified in the **Purchasing Closure** field (AN_TYPE_PO_CCA) on the Installation Options - Project Costing Integration page. The **Purchasing Closure** field default value is *CCA*.

Example of the Procurement Process in PeopleSoft Project Costing

Assume that you create a requisition with two lines—one line for 590.00 USD and one for 750.00 USD. From the requisition you create a purchase order with two lines in the same amounts as the requisition. You receive a voucher for 615.00 USD, which corresponds to one line of the purchase order (590.00 USD) and freight (25.00 USD). You close the remaining purchase order line for 750.00 USD.

For this example, the system creates these rows in the Project Transaction table for the requisition, purchase order, requisition reversal, voucher, purchase order reversal, and purchase order closure:

Description	Analysis Type	Quantity	Unit of Measure	Total Amount
Requisition line 1	REQ	20	EA	590.00 USD
Requisition line 2	REQ	30	EA	750.00 US
Requisition line 1 reversal	RRV	20	EA	590.00 USD
Requisition line 2 reversal	RRV	30	EA	750.00 USD
Purchase order line 1	COM	20	EA	590.00 USD
Purchase order line 2	COM	30	EA	750.00 USD
Voucher for purchase order line 1	ACT	20	EA	590.00 USD
Voucher for freight	ACT	20	EA	25.00 USD
Purchase order line 1 reversal	CRV	20	EA	590.00 USD

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Description	Analysis Type	Quantity	Unit of Measure	Total Amount
Purchase order line closure	CCA	30	EA	750.00 USD

Nonrecoverable VAT Amounts in Purchase Order Reversals

The Purchasing Adjustment process includes nonrecoverable VAT amounts in the calculation of purchase order reversals. Nonrecoverable VAT amounts appear as transaction rows with an analysis type of VIN (nonrecoverable VAT) on the Project Transaction table. The Payables to Project Costing Application Engine process (PC_AP_TO_PC) adds VIN rows to the Project Transaction table for vouchers that contain nonrecoverable VAT.

The Purchasing Adjustment process includes nonrecoverable VAT amounts in the calculation of PO reversal amounts. This applies only if the ACT Amount installation option is selected in the **Purchase Order Reversal** field (CRV_OPTN) on the Installation Options - Project Costing page. Additionally, the VIN analysis type is added to the POADJ analysis group system data.

Using Commitment Control to Generate Reversals

If you use budget checking, prior to creating RRV and CRV rows the Purchasing Adjustment process evaluates Commitment Control tables to determine if a requisition reversal or commitment reversal already exists. If a reversal row already exists for the requisition or commitment, the Purchasing Adjustment process creates the reversal based on information in Commitment Control. If a reversal does not already exist for the requisition or commitment, the Purchasing Adjustment process creates RRV and CRV rows based on information in the Project Transaction table.

Related Topics

- PeopleSoft Commitment Control: Understanding PeopleSoft Commitment Control
- Application Fundamentals: Installation Options - Project Costing Page

Understanding Integration with PeopleSoft Inventory

You can integrate fulfilled demand from Inventory to Project Costing. Fulfilled demand is placed through inventory costing on the Inventory Accounting Distribution table (CM_ACCTG_LINE) where it can be picked up by PeopleSoft Project Costing and brought in as a transaction. Rows in the Inventory Accounting Distribution table are eligible for integration if they:

- Contain values for the required project-related ChartFields.
- Have a **PC Distribution Status** status of *N* (not distributed).

The Inventory to Project Costing Application Engine process (PC_IN_TO_PC) updates the **PC Distribution Status** to *D* (distributed) and copies the transactions to the Project Transaction table. If you use PeopleSoft Maintenance Management, the process also imports the work order business unit, work order ID, task ID, work order resource type, and work order resource line into the Project Transaction table.

Fulfilled demand is brought into PeopleSoft Project Costing as transactions with the analysis type that is specified in the **Inventory** field (PC_AN_TYPE_IN) on the Installation Options - Project Costing Integration page. The **Inventory** field delivered default value is *ACT.*

Related Topics

- PeopleSoft Inventory: The Order Fulfillment Process

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- PeopleSoft Maintenance Management: Integrated Product Setup Considerations
- PeopleSoft Maintenance Management: Shared Products Setup Considerations

Understanding Integration with PeopleSoft Payables

You can integrate approved vouchers from PeopleSoft Payables to PeopleSoft Project Costing. These actions occur to integrate vouchers between Project Costing and Payables:

1. A purchase order is created in PeopleSoft Purchasing and sent to PeopleSoft Payables.
2. Vouchers entered into PeopleSoft Payables for bills received go through a matching process.
3. Vouchers that have been matched are approved and posted to the AP (accounts payable) Accounting Entries table (VCHR_ACCTG_LINE).
4. The Payables to Project Costing process copies voucher rows where the **PC Distribution Status** field is set to *N* (not distributed) from the AP Accounting Entries table to the Project Transaction table.

   Vouchers appear as transactions with the analysis type that is specified in the **Payables** field (PC_AN_TYPE_AP) on the Installation Options - Project Costing Integration page. The **Payables** field delivered default value is *ACT.*

   If you use PeopleSoft Maintenance Management, the process also imports the work order business unit, work order ID, task ID, work order resource type, and work order resource line into the Project Transaction table.

Related Topics

- PeopleSoft Payables: Understanding the Matching Process
- PeopleSoft Payables: Initiating the Matching Application Engine Process
- PeopleSoft Maintenance Management: Integrated Product Setup Considerations
- PeopleSoft Maintenance Management: Shared Products Setup Considerations

Vouchers with Assets

If assets are associated with a voucher line and the asset management distribution status (AM_DIST_STATUS) in Payables has a value of *P, N, M,* or *V,* then the voucher lines can only be distributed to Asset Management through Payables. In this scenario, the asset management distribution status in Project Costing is *D,* which means that the asset cannot be distributed through Project Costing. Run the Load Asset process through vouchers to distribute voucher lines to Asset Management.

Understanding Integration with PeopleSoft Order Management

You can use the Order Management to Project Costing Application Engine process (PC_OM_TO_PC) to integrate orders that originate in Order Management to Project Costing. These actions occur to integrate orders between PeopleSoft Order Management and PeopleSoft Project Costing:

1. The Order Management to Project Costing process uses the Order Schedule Line table (ORD_SCHEDULE) to determine which transactions have a **PC Distribution Status** field value of *N* (not distributed).

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2. The Order Management to Project Costing process pulls these rows into PeopleSoft Project Costing.

   Orders appear as transactions with the analysis type that is specified in the **Order Management** field (PC_AN_TYPE_OM) on the Installation Options - Project Costing Integration page. The **Order Management** field delivered default value is *ORD.*

> **Note**
>
> If you set up the appropriate exchange rates, transaction amounts that are not in your business unit currency are converted during the integration process.

See also, *PeopleTools: PeopleSoft Process Scheduler*

Creating Requisitions in PeopleSoft Project Costing

Page Used to Create Requisitions in PeopleSoft Project Costing

Page Name	Definition Name	Usage
Add Transactions Page	INTFC_PROJ_EXPR_02	Add transactions to a project activity.

Add Transactions Page

Use the Add Transactions page (INTFC_PROJ_EXPR_02) to add transactions to a project activity.

Navigation:

Project Costing, and then **Transaction Definitions**, and then **Add Transactions**, and then **Add Transactions**

Requisition rows that you enter on this page are processed by the Purchasing Requisition Loader Application Engine process (PO_REQLOAD) as requisitions. Enter the fields that are required for requisition transactions for materials required by a project.

Enter transaction lines with the default analysis type of *REQ* (requisition). This is required for the Purchasing Requisition Loader process to retrieve the transaction and convert it to a requisition.

When the analysis type is *REQ,* the system populates these fields:

- The **Quantity** field default value is *1.*
- The **PO Distribution Status** field (PO_DISTRIB_STATUS) value is *1* (active), which indicates that PeopleSoft Purchasing has not processed the requisition.
- When you enter the item ID, the **Unit of Measure** field is populated with the standard unit of measure for the item ID and is not editable.

Related Topics

- Add Transactions Page
  Use the Add Transactions page (INTFC_PROJ_EXPR_02) to add transactions to an active project activity.

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Integrating Requisitions and Purchase Orders with PeopleSoft Project Costing

Page Used to Integrate Requisitions and Purchase Orders with PeopleSoft Project Costing

Page Name	Definition Name	Usage
Purchasing Page	PC_PO_TO_PC	Run the Purchasing to Project Costing process to import requisitions, purchase orders, or both from PeopleSoft Purchasing to PeopleSoft Project Costing.

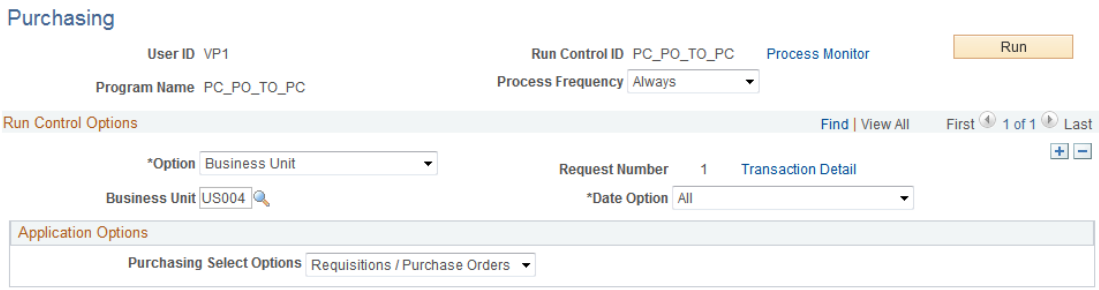
Purchasing Page

Use the Purchasing page (PC_PO_TO_PC) to run the Purchasing to Project Costing process to import requisitions, purchase orders, or both from PeopleSoft Purchasing to PeopleSoft Project Costing.

Navigation:

Project Costing, and then **Cost Collection**, and then **Cost Collect Purchasing**

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



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Field or Control	Description
Option	Select to pull in specified transactions for all projects and activities, or for specific ones. Options are: *All:* Processes all transactions that are associated with all activities. *Business Unit:* Processes transactions for the selected business unit. *Business Unit/Project:* Processes transactions for the selected business unit and project. *Business Unit/Project/Activity:* Processes transactions for the selected business unit, project, and activity.

Field or Control	Description
Purchasing Select Options	Select one of these options: *Purchase Orders:* Integrates only purchase order transactions into PeopleSoft Project Costing. *Requisitions:* Integrates only requisition transactions into PeopleSoft Project Costing. *Requisitions / Purchase Orders:* Integrates purchase orders and requisition transactions into PeopleSoft Project Costing.
Run	Click to run the Purchasing to Project Costing integration process.

Adjusting Requisitions and Purchase Orders in PeopleSoft Project Costing

Project Costing summarization templates can be used to summarize transaction rows that are imported into the Project Transaction table.

For additional information about summarizing feeder transactions, see Understanding Feeder and Pricing Summarization

Page Used to Adjust Requisitions and Purchase Orders in PeopleSoft Project Costing

Page Name	Definition Name	Usage
Purchasing Adjustments Page	PC_POADJUST	Request adjustments to requisitions and purchase orders.

Purchasing Adjustments Page

Use the Purchasing Adjustments page (PC_POADJUST) to request adjustments to requisitions and purchase orders.

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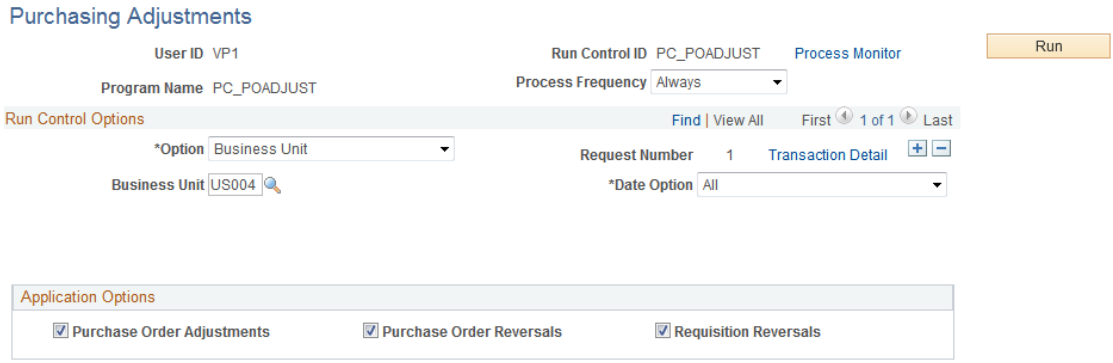
Navigation:

Project Costing, and then **Cost Collection**, and then **Cost Collect Purchasing Adj**

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



Field or Control	Description
Option	Select an option to process transactions for all projects and activities, or for specific ones. If you select *Business Unit*, *Business Unit/Project*, or *Business Unit/Project/Activity*, and the **From Feed** option is not selected on the Installation Options - Project Costing page for the type of transactions that you want to process, the system loads only the rows from the Project Transaction table that are associated with the run control options into a temporary table to process. However, the system does not use a temporary table to process the selected rows if the **From Feed** option is selected. The **From Feed** option enables the Purchasing Adjustment process to begin automatically when you run the Purchasing to Project Costing process, Inventory to Project Costing process, or Payables to Project Costing process. When these processes automatically trigger the Purchasing Adjustment process, it evaluates all purchasing-related rows. **Note:** If you restrict the Purchasing Adjustment process to run on a subset of business units, projects, or activities, you will have an outstanding commitment for rows that were not selected in the run control. For example, if a voucher contains Project A and Project B, and you run the Purchasing Adjustment process only on Project A, an outstanding commitment will remain in the Project Transaction table for Project B until you rerun the Purchasing Adjustment process with run control options that include Project B.

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Field or Control	Description
Application Options	Select an option to indicate which transactions to create in PeopleSoft Project Costing. Values are: *Purchase Order Adjustments:* Creates transactions with an analysis type that is specified in the **Purchasing Closure** field on the Installation Options - Project Costing Integration page. The **Purchasing Closure** field delivered default value is *CCA*. *Purchase Order Reversals:* Creates transactions with an analysis type that is specified in the **Purchasing Reversals** field on the Installation Options - Project Costing Integration page. The **Purchasing Reversals** field delivered default value is *CRV*. *Requisition Reversals:* Creates reversal transactions with an analysis type that is specified in the **Requisition Reversals** field on the Installation Options - Project Costing Integration page. The **Requisition Reversals** field default value is *RRV*.
Run	Click to run the Purchasing Adjustment process.

On the Installation Options - Project Costing page, you can specify the Purchasing Adjustment process to run automatically when purchase orders or vouchers are integrated into PeopleSoft Project Costing. Select the **From Feed** option to initiate the Purchasing Adjustment process automatically when running the Purchasing to Project Costing process, the Inventory to Project Costing process, or the Payables to Project Costing process.

Integrating with PeopleSoft Inventory

Page Used to Integrate with PeopleSoft Inventory

Page Name	Definition Name	Usage
Inventory	PC_IN_TO_PC	Request process to retrieve fulfilled demand from PeopleSoft Inventory. To access page, select **Project Costing**, and then **Cost Collection**, and then **Cost Collect Inventory**.

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Integrating with PeopleSoft Payables

Page Used to Integrate with PeopleSoft Payables

Page Name	Definition Name	Usage
Payables Page	PC_AP_TO_PC	Request process to retrieve approved vouchers from PeopleSoft Payables.

Payables Page

Use the Payables page (PC_AP_TO_PC) to request process to retrieve approved vouchers from PeopleSoft Payables.

Navigation:

Project Costing, and then **Cost Collection**, and then **Cost Collect Payables**

Field or Control	Description
Application Options	Select the option to indicate the detail at which rows are created in PeopleSoft Project Costing. Options are: *Detail:* Creates one row in the Project Transaction table for each type of cost that is associated with a voucher. Use this option when you require more detail for analysis or project billing purposes. Types of costs that will generate new rows are: • Freight • Late Charges • Merchandise • Miscellaneous • Nonrecoverable VAT • Sales Tax • Use Tax *Summary:* Creates one summarized row in the Project Transaction table for each approved voucher distribution line.
Run	Click to run the Payables to Project Costing integration process.

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Integrating with PeopleSoft Order Management

Page Used to Integrate with PeopleSoft Order Management

Page Name	Definition Name	Usage
Order Management Page	PC_OM_TO_PC	Run the Order Management to Project Costing process to retrieve customer orders from PeopleSoft Order Management. To access this page, select **Cost Collect Order Mgmt** from the Cost Collection menu.

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Integrating with PeopleSoft Expenses

Understanding Integration with Expenses

PeopleSoft Expenses is a robust application that is designed to track employee time and expense. Through the integration process, you can pull time and expense entries into PeopleSoft Project Costing for pricing transaction rows, project reporting, analysis, and customer billing.

These are the high level steps to integrate time and expense data to PeopleSoft Project Costing:

1. In PeopleSoft Expenses, configure time and expense reports to charge expenses to project-related accounting ChartFields, such as PC business unit, project, activity, source type, category, and subcategory.

   Optionally specify different ChartField values for each expense or time report line item.

2. In PeopleSoft Expenses, approve and post expense transactions, which populates the Expenses Accounting Line table (EX_ACCTG_LINE).

3. In PeopleSoft Expenses, stage time entries to the Time Staging for Project Transaction table (EX_PROJ_RES_STG).

4. In PeopleSoft Project Costing, run the Expenses to Project Costing Application Engine process (PC_EX_TO_PC) to pull staged expense transactions from the Expenses Accounting Line table, and staged time transactions from the Time Staging for Project Transaction table, into PeopleSoft Project Costing tables where billable items can be passed to PeopleSoft Billing.

Use the ‘Setup Integration Exclusions’ to selectively apply criteria to exclude transactions from the integration into Project Costing. For more information, see Excluding Transactions from Integrations into Project Costing.

Time Report Charging Levels

If you use PeopleSoft Program Management and PeopleSoft Expenses, you can enter time reports for all detail activities, or specify the level of activities on the work breakdown structure (WBS) for which you want to capture time against a project. The level at which you capture costs for a project can be different than the level at which you report time in PeopleSoft Expenses.

Use the time report charging level of *All Detail Activities* to report time in PeopleSoft Expenses at the detail activity level. Use the time report charging level of *Activity Costing Level* to charge time in PeopleSoft Expenses only to summary activities and detail activities that reside in the specified project charging level.

This diagram shows examples of two different time report charging levels for a project. In each example the orange vertical bar aligns with the activities to which you can charge time:

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Time Report Charging Level: All Detail Activities

WBS ID	Available Activities to Charge Time
1	**PLANNING**
1.1	Plan Phase 1
1.2	Plan Phase 2
2	**DESIGNING**
2.1	**Design Phase 1**
2.1.1	Complete Design
2.1.2	Approve Design
2.2	Design Phase 2
3	**EXECUTING**
3.1	Execute Phase 1
3.2	Execute Phase 2
4	**MAINTAINING**

Time Report Charging Level: Activity Costing Level 1

WBS ID	Available Activities to Charge Time
1	**PLANNING**
1.1	Plan Phase 1
1.2	Plan Phase 2
2	**DESIGNING**
2.1	**Design Phase 1**
2.1.1	Complete Design
2.1.2	Approve Design
2.2	Design Phase 2
3	**EXECUTING**
3.1	Execute Phase 1
3.2	Execute Phase 2
4	**MAINTAINING**

If you use a time report charging level of *All Detail Activities,* users with the appropriate security access can select any detail activity to charge time in PeopleSoft Expenses. If you use a time report charging level of *Activity Costing Level,* the list of activities to which users can charge time in PeopleSoft Expenses is based on summary and detail activities that reside in the specified project charging level.

Based on the time report charging levels illustrated in the previous diagram, the following diagram compares two different lists of available activities from which users can select when they create a time report for the project:

Time Report Charging Level: All Detail Activities

WBS ID	Available Activities to Charge Time
1.1	Plan Phase 1
1.2	Plan Phase 2
2.1.1	Complete Design
2.1.2	Approve Design
2.2	Design Phase 2
3.1	Execute Phase 1
3.2	Execute Phase 2
4	MAINTAINING

Time Report Charging Level: Activity Costing Level 1

WBS ID	Available Activities to Charge Time
1	PLANNING
2	DESIGNING
3	EXECUTING
4	MAINTAINING

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If you capture activity costs at the project charging level, and enter time reports for all detail activities, the system creates time transaction rows for the project charging level parent activity during the PeopleSoft Expenses integration. The Project Transaction table (PROJ_RESOURCE) retains the original detail activity ID from the time report.

> **Note**
>
> If you enter time reports only at the project charging level, the Project Transaction table will not retain the time report activity detail.

Related Topics

- PeopleSoft Program Management: Understanding Project Charging Levels

Setting Up Time and Expense ChartFields for PeopleSoft Project Costing

Set up default ChartFields to charge expense and time reports. You can override the default ChartFields for each detail line item. In PeopleSoft Expenses you can establish user preferences for ChartField defaults that appear automatically as ChartField values when you create new time and expense reports.

Pages Used to Set Up Time and Expense ChartFields for PeopleSoft Project Costing

Page Name	Definition Name	Usage
PeopleSoft Expenses: Accounting Defaults Page	TE_SHEET_SPLIT	View or modify the default accounting ChartFields to which the expense report is charged.
PeopleSoft Expenses: Create (or Modify) Expense Report Page	TE_SHEET_DIST	View or modify the project ChartFields to which expense report line items are charged.
PeopleSoft Expenses: Project Time Details Page	TE_TIME_DTL	View or modify the default accounting ChartFields to which the time report is charged.

Related Topics

- PeopleSoft Expenses: Integrating With PeopleSoft Project Costing

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Stage Time and Expense Reports

Page Used to Stage Time and Expense Reports

Page Name	Definition Name	Usage
Expense Processes	RUN_EXTRNPRC	Run the Expenses Transaction Process Application Engine process (EX_TRAN_PRCS) which triggers other processed based on the options selected.

Expense Processes Page

Use the Expense Processes page (RUN_EXTRNPRC) to run the Expenses Transaction Process Application Engine process (EX_TRAN_PRCS) which triggers other processes based on the options selected.

Navigation:

- **Travel and Expenses**, and then **Process Expenses**, and then **Expense Processing**, and then **Expense Processes**
- **Travel and Expenses**, and then **T and E Administration Center**, and then **Process Transactions**, and then **Expense Processing**, and then **Expense Processes**

Field or Control	Description
Post Liabilities	Select to run the Expenses Liability Posting Application Engine process (EX_POST_LIAB) to post expense report entries to the Expenses Accounting Line table. This table contains expense entries that integrate with PeopleSoft Project Costing when you run the Expenses to Project Costing process.
Stage Time to Project Costing	Select to run the Stage Time for Projects Application Engine process (EX_PC_TM_STG) to stage approved time entries in the Time Staging for Project Transaction table. This table contains time entries that integrate with PeopleSoft Project Costing when you run the Expenses to Project Costing process.

Related Topics

- PeopleSoft Expenses: Running Expense Transaction Processes

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Importing Time and Expenses into PeopleSoft Project Costing

Pages Used to Import Time and Expenses into PeopleSoft Project Costing

Page Name	Definition Name	Usage
Expenses Page	PC_EX_TO_PC	Run the Expenses to Project Costing process to import approved time reports and expenses into PeopleSoft Project Costing from the PeopleSoft Expenses system. Access this page from the **Project Costing**, and then **Cost Collection** menu option.
Transaction List Page	PROJECT_EXPRESSG	View time and expense data that you imported into PeopleSoft Project Costing.

Expenses Page

Use the Expenses page (PC_EX_TO_PC) to run the Expenses to Project Costing process to import approved time reports and expenses into PeopleSoft Project Costing from the PeopleSoft Expenses system.

Navigation:

Project Costing, and then **Cost Collection**, and then **Expenses**, and then **Expenses**

Time and expense data must be in the appropriate staging tables in the Financials database before you run the Application Engine process to pull data into the Project Transaction table in PeopleSoft Project Costing. The Expenses to Project Costing process loads time report entries from the Time Staging for Project Transaction table, and loads expense report entries from the Expenses Accounting Line table.

Field or Control	Description
Options	You can process expenses for all activities or for just specific ones. Available values are: *All:* Select to import all approved expenses in the Expenses Accounting Line table, and all approved time reports in the Time Staging for Project Transaction table, to the Project Transaction table. *Business Unit:* Select to specify approved time reports and expenses for the selected business unit. *Business Unit/Project:* Select to specify approved time reports and expenses for the selected business unit and project. *Business Unit/Project/Activity:* Select to specify approved time reports and expenses for the selected business unit, project, and activity.

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Field or Control	Description
Date Option	Select an option to specify which transactions to include in this run control. Available options are: *All:* Selects all eligible rows regardless of the accounting date or transaction date. *Accounting Date:* Selects eligible rows with an accounting date that falls within the date range that you specify for this run control. *Transaction Date:* Selects eligible rows with a transaction date that falls within the date range that you specify for this run control.
From Date and **Through Date**	Enter the date range of the eligible transactions. These fields appear if you select a date option of *Accounting Date* or *Transaction Date.*

Expense amounts that are in a different currency than the business unit currency are converted during the integration process, if you set up the appropriate exchange rates.

After time and expense transactions are imported into the Project Transaction table, you can view them in the Transaction List page as follows:

- Expenses appear as transactions with the analysis type that you specify in the Expenses field (AN_TYPE_EX) on the Installation Options - Project Costing Integration page.

  The default analysis type is *ACT* (actual cost).

- Time reports appear as transactions with the analysis type that you specify in the Mobile Time / Expense field (AN_TYPE_TT_EX) on the Installation Options - Project Costing Integration page.

  The default analysis type is *TLX* (cost from time traveler).

If you use PeopleSoft Maintenance Management, the Expenses to Project Costing process imports this additional information into the Project Transaction table for each time transaction row:

- Work order business unit
- Work order ID
- Task ID
- Work order resource type
- Work order resource line number

Work order labor hour transactions appear with the analysis type that you specify in the Mobile Time / Expense field in the Installation Options - Project Costing Integration page.

> **Note**
>
> Various Application Engine processes, including the Expenses to Project Costing process, trigger the Refresh Summary Tables Application Engine process (PC_SUM_RFSH). This process runs in the background and updates the PeopleSoft Project Costing summary tables.

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Related Topics

- Understanding Integration with PeopleSoft Contracts and PeopleSoft Billing
  PeopleSoft Project Costing works with PeopleSoft Contracts to generate project-related customer billing. This is called rate-based project billing. For rate-based billing, PeopleSoft Contracts pulls information from project transactions and populates the PeopleSoft Billing interface tables with the billing information.
- Understanding Integration with PeopleSoft Maintenance Management
  PeopleSoft Maintenance Management is a PeopleSoft Asset Lifecycle Management solution that gives you the tools to plan and schedule maintenance and construction, facilitate the accurate completion of the work, streamline the capture of the results, and automatically process the financial implications of the work. PeopleSoft uses work orders in PeopleSoft Maintenance Management to track the costs associated with maintaining or creating assets.
- Processing Multiple Currencies

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Integrating with Time and Labor

Understanding Integration with PeopleSoft Time and Labor

PeopleSoft Project Costing, which is in the Financials database, integrates with PeopleSoft Time and Labor, which is in the Human Capitol Management System (HCM) database, to bring estimated gross labor costs and distributed, actual labor costs into PeopleSoft Project Costing.

To enable data transfer during a payroll period, PeopleSoft Time and Labor uses an estimation process that links to PeopleSoft Enterprise Payroll to summarize hours and labor expenses. After the close of a payroll period, PeopleSoft Time and Labor distributes payroll expenses to the Payable Time table (TL_PAYABLE_TIME). The transaction rows that have a value for project business unit, project ID, and activity ID are brought into PeopleSoft Project Costing using enterprise integration points (EIPs).

To maintain integrity between the Financials and HCM databases, necessary data from each database is extracted to staging tables that are set up identically in each database. The staging tables are available to the integrating application.

This topic discusses:

- Events that trigger PeopleSoft Time and Labor to send time to PeopleSoft Project Costing.
- Types of labor costs that PeopleSoft Time and Labor calculates.
- Controlling transactions sent to PeopleSoft Project Costing.
- PeopleSoft Time and Labor for Billing.
- Enterprise Integration Points used in PeopleSoft Time and Labor integration.
- Integration setup steps.

See also, *PeopleSoft HCM: Time & Labor*

Events That Trigger Time and Labor to Send Time to PeopleSoft Project Costing

You can send both estimated and actual time and cost data to PeopleSoft Project Costing from PeopleSoft Time and Labor.

Estimated payable time is published to PeopleSoft Project Costing when:

- PeopleSoft Time and Labor receives a request from PeopleSoft Project Costing in the form of an application message from the Financials database.

  In response, PeopleSoft Time and Labor automatically publishes estimated time for payable time records that have a payable status of Estimate, Needs Approval, Approved, Sent, Rejected, and Taken.
- You run the Publish Estimated Payable Time Application Engine process (TL_PUB_TM_AE) in PeopleSoft Time and Labor to publish estimated time for payable time records.

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The system uses the ESTIMATED_TIME_BATCH_ADD application message to send estimated payable time to PeopleSoft Project Costing.

Actual payable time is published to PeopleSoft Project Costing when:

- You run the Publish Actual Payable Time Application Engine process (TL_PY_PUB_TM) in PeopleSoft Time and Labor to publish closed payable time records that will not be run through the Labor Distribution process.

  The system uses the ACTUAL_TIME_ADD application message.
- You use one of the payable time approval pages in PeopleSoft Time and Labor to close payable time for time reporters whose time is not sent to payroll, or to close payable time for a time reporting code that is not sent to payroll.

  The payable time record statuses are Closed and No Pay. The system uses the ACTUAL_TIME_ADD application message.
- You make adjustments to time entries using the Adjust Paid Time page.

  The payable time record status is Closed. The system uses the ACTUAL_TIME_ADD application message.
- Payroll processes are completed for payable time record statuses of Closed, Paid - Labor Distributed, or Paid - Labor Diluted.

  The system uses the ACTUAL_TIME_BATCH_ADD application message.

> **Important**
>
> If you activate the **Don't Publish to Project Costing** option for certain time reporting codes (TRCs), and the transactions that are associated with those TRCs are used for costing, a discrepancy may occur between the costs that you track in PeopleSoft Project Costing and the costs that you bill to customers.
>
> Total costs in the general ledger system do not equal the total costs in PeopleSoft Project Costing. The reason is because PeopleSoft Enterprise Payroll sends PeopleSoft General Ledger all direct labor and employer-paid burden (indirect costs), such as taxes, deductions, benefits, and so on. PeopleSoft Time and Labor sends Project Costing only direct labor costs.

Types of Labor Costs that Time and Labor Calculates

These two types of labor costs—gross estimated amounts and labor distribution amounts—are calculated in PeopleSoft Time and Labor:

- **Gross Estimated Amounts:** These are estimated labor costs.

  Estimated gross amounts are automatically calculated for every instance of payable time. These amounts can be picked up anytime during a payroll period and passed to PeopleSoft Project Costing as time and labor accrual costs.

  This option is automatically selected when you select the **Interface with PS/Projects** option on the PeopleSoft Time and Labor TL Installation page.
- **Labor Distribution Amounts:** Actual costs are calculated by your payroll system and returned to PeopleSoft Time and Labor after the completion of a pay run.

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PeopleSoft Project Costing considers all payable time that it receives to be additions to previously received time. PeopleSoft Time and Labor sends offsets in rare cases when there is updated actual time.

> **Note**
>
> Contractors are usually not paid through the payroll system. If the *Send to Payroll* option is not selected in PeopleSoft Time and Labor, estimated gross amounts are not brought into PeopleSoft Project Costing for contractors. Depending on how your system is set up, labor-distributed costs could come into PeopleSoft Project Costing as vouchers from PeopleSoft Payables.

Controlling Transactions Sent to PeopleSoft Project Costing

You can prevent PeopleSoft Time and Labor from sending transactions associated with specific TRCs to PeopleSoft Project Costing.

> **Important**
>
> If you deselect the **Publish to Projects** option for certain TRCs and the transactions that are associated with those TRCs contain project information, a discrepancy occurs in the project information between PeopleSoft Time and Labor and PeopleSoft Project Costing.

Time and Labor for Billing

This topic discusses using billing estimates with out and with time and labor summarization.

Using Billing Estimates without Time and Labor Summarization

PeopleSoft Project Costing can use either actual amounts or estimates for billing purposes.

Using estimates for Billing is indicated by selecting the Time and Labor for Billing check box on the Project Costing Options page. Estimates are subject to change in PeopleSoft Time and Labor until payroll costs are distributed. If rate adjustments or additional payments occur that were not originally recorded in the PeopleSoft Time and Labor system, they can be adjusted and published to PeopleSoft Project Costing as actual amounts.

When the actual paid amount is processed, the system replaces PeopleSoft Time and Labor billing rows from estimate processing that have not been billed. Changes to labor rows between actual processing and estimate processing can be any combination of the following:

- Time can be charged to a different project or activity key ChartField.

  For changes to a different project or activity key field, the original row from estimate processing is reversed.
- Time can be charged to a different source type, category, or subcategory non-key ChartField.

  For changes to source type, category, or subcategory non-key fields, original rows from estimate processing are reversed and an adjustment is created.
- Quantity or amount charged to a project can be different.

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For changes to quantity or amount, including fractional changes, delta rows are created. At the business unit level, you can have different criteria for creating delta rows that are based on changes to quantity only, amount only, or changes to both quantity and amount.

In some cases a large number of delta rows may be created. For example, if a business unit is set up for delta to amount, fractional changes may create many delta rows. In such cases, you may summarize delta rows at the business unit level.

Using Billing Estimates with Time and Labor Summarization

When using billing estimates with Time and Labor summarization all estimates, regardless of being billed or not billed, are reversed when Project Costing receives actual payroll expenses. When the Time and Labor Integration process (PC_TL_TO_PC) processes actual payroll expenses the system creates:

- New estimated rows (TLB) that are used in Billing.
- New actual rows (PAY).

Enterprise Integration Points Used in PeopleSoft Time and Labor Integration

PeopleSoft Project Costing uses these application messages to integrate Financials application tables with HCM application tables:

Messages	Integration Point Name	Publisher
BUS_UNIT_PC_SYNC BUS_UNIT_PC_FULLSYNC	BUSINESS UNIT TABLE PC	Project Costing
PROJECT_SYNC PROJECT_FULLSYNC	PROJECT TABLE	Project Costing
PROJECT_ACTIVITY_SYNC PROJECT_ACTIVITY_FULLSYNC	PROJECT ACTIVITIES	Project Costing
PROJ_ACTIVITY_STATUS_SYNC PROJ_ACTIVITY_STATUS_FULLSYNC	PROJECT ACTIVITY STATUS	Project Costing
RESOURCE_TYPE_SYNC RESOURCE_TYPE_FULLSYNC	PROJECT RESOURCE TYPE	Project Costing
RES_TYPE_CAT_LINK_SYNC RES_TYPE_CAT_LINK_FULLSYNC	PROJECT TYPE-TO-CATEGORY LINK	Project Costing
RES_CAT_SUB_CAT_LINK_SYNC RES_CAT_SUB_CAT_LINK_FULLSYNC	PROJECT CATEGORY-TO-SUBCATEGORY LINK	Project Costing
RESOURCE_CAT_SYNC RESOURCE_CAT_FULLSYNC	PROJECT RESOURCE CATEGORY	Project Costing
RESOURCE_SUB_CAT_SYNC RESOURCE_SUB_CAT_FULLSYNC	PROJECT RESOURCE SUBCATEGORY	Project Costing
PROJECT_TEAM_SYNC PROJECT_TEAM_FULLSYNC	PROJECT TEAM	Project Costing
PROJECT_STATUS_DEFN_SYNC PROJECT_STATUS_DEFN_FULLSYNC	PROJECT STATUS DEFINITION	Project Costing

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Messages	Integration Point Name	Publisher
PROJECT_STATUS_SYNC PROJECT_STATUS_FULLSYNC	PROJECT STATUS	Project Costing
UOM_SYNC UOM_FULLSYNC	UNIT OF MEASURE	Financials to HCM
BUS_UNIT_FS_SYNC BUS_UNIT_FS_FULLSYNC	BUSINESS UNIT TABLE FS	Financials to HCM
TIME_REPORTING_CODE_SYNC TIME_REPORTING_CODE_FULLSYNC	TIME REPORTING CODES	Time and Labor
ACTUAL_TIME_ADD ACTUAL_TIME_BATCH_ADD	T&L ACTUAL TIME	Time and Labor
ESTIMATED_TIME_BATCH_ADD	T&L ESTIMATED TIME	Time and Labor
TBLSET_CONTROL_INITIALIZE SETID_INITIALIZE	TABLE SET CONTROL	Financials to HCM
ESTIMATE_FORECAST_TIME_REQUEST Publish Batch Program: PC_TL_TO_PC Subscribe Batch Program: TL_PUB_TM_AE	ESTIMATE & FORECAST TIME REQUEST	Project Costing

> **Note**
>
> To research the technical details of any integration point used by PeopleSoft applications, refer to the online Interactive Services Repository found on Oracle's My Oracle Support website.

To enable the TBLSET_CONTROL_INITIALIZE service operation to publish between two databases, you must set up message chunking for the operation by record group. This process is described in these set of steps:

1. Identify the record groups that exist in both databases
2. Create a chunking rule for each record group and then add the chunking definition to the subscribing nodes of the group.
3. Enter the chunking rule you created to the full table publish rules definition for the TBLSET_CONTROL_INITIALIZE service operation.

If you are publishing to one node, this setup is sufficient; however, if you are publishing to multiple nodes, you need to add routing PeopleCode to the channel.

See Integration Interfaces: Setting Up Message Chunking.

Integration Setup Steps

To integrate PeopleSoft Time and Labor with PeopleSoft Project Costing:

- Activate EIPs used in PeopleSoft Time and Labor integration.

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- Select analysis types for PeopleSoft Time and Labor integration.
- Select PeopleSoft Time and Labor options for PeopleSoft Project Costing integration.
- Select PeopleSoft Project Costing options for PeopleSoft Time and Labor integration.
- Retrieve units of measure in PeopleSoft Time and Labor from PeopleSoft Project Costing.
- Ensure that you have set up as a time reporter in PeopleSoft Time and Labor each person who reports time to projects.
- Populate the task entity prompt tables with values defined in PeopleSoft Project Costing.
- Set up task templates and task profiles that include project-related task entities.

You will complete some of these steps in PeopleSoft Time and Labor. See *PeopleSoft HCM: Time & Labor*

Setting Up Integration with Time and Labor

Pages Used to Set Up Integration with Time and Labor

Page Name	Definition Name	Usage
Installation Options - Project Costing Integration Page	INSTALLATION_PCINT	Select analysis types for transactions from PeopleSoft Time and Labor.
Time and Labor Installation Page	TL_INSTALLATION	Configure options in PeopleSoft Time and Labor to integrate with PeopleSoft Project Costing. You access this page through the HCM database.
Project Costing Options Page (for Time and Labor integration)	BUS_UNIT_OPT_PC	Specify options in the **Time and Labor Interface** group box to integrate with PeopleSoft Time and Labor.

Activating EIPs Used in Time and Labor Integration

The necessary application messages that must be activated are listed in the Enterprise Integration Points Used in PeopleSoft Time and Labor Integration topic. Detailed instructions for activating application messages can be found in the Integration Interfaces: Setting Up PeopleSoft Integration Points topic

Installation Options - Project Costing Integration Page

Use the Installation Options - Project Costing Integration page (INSTALLATION_PCINT) to select analysis types for transactions from PeopleSoft Time and Labor.

Navigation:

Set Up Financials/Supply Chain, and then **Install**, and then **Installation Options**, and then **Project Costing Integration**

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

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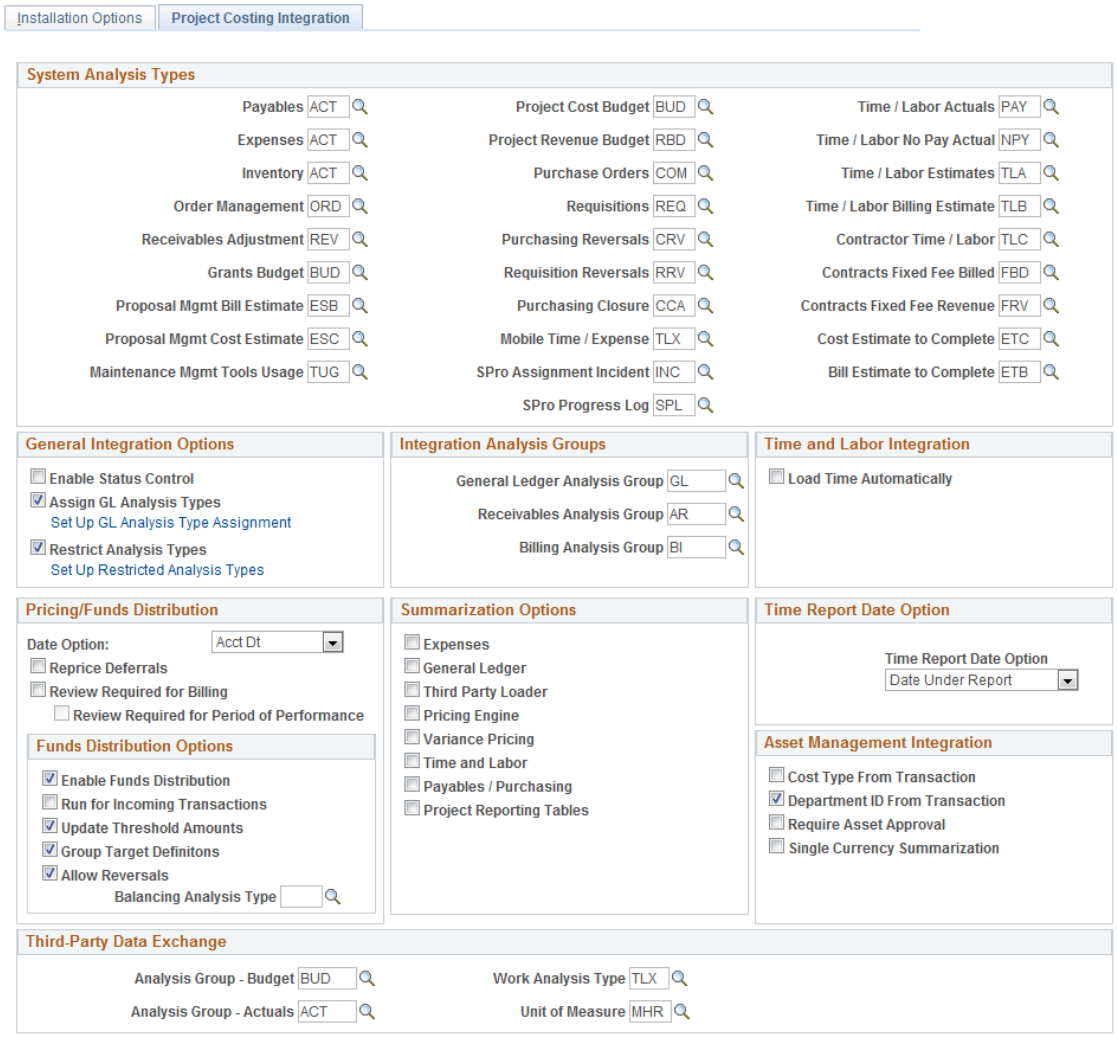

Default analysis types for each inbound integration point are delivered with the PeopleSoft Project Costing system and specified on this page. You can override the default analysis types.

These are the default analysis types that are delivered for integration with PeopleSoft Time and Labor:

Field or Control	Description
Time/Labor Actuals	*PAY:* Indicates Payroll expenses that are brought into PeopleSoft Project Costing after the close of a payroll period.

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Field or Control	Description
Time/Labor No Pay Actual	*NPY:* Indicates hours that are entered into PeopleSoft Time and Labor with a time reporting code of BOH (bill but no pay). When brought into PeopleSoft Project Costing, two rows are created: • A TLB row for the billing portion of the allocation. • An NPY row for the no-pay portion of the allocation. The system does not pay that person for those hours, and does bill the time for those hours.
Contractor Time/Labor	*TLC:* Indicates separate cost rows that are created after the close of a payroll period.
Time/Labor Estimates	*TLA:* Indicates estimate rows that are brought into PeopleSoft Project Costing for the open pay period.
Time/Labor Billing Estimate	*TLB:* Indicates TLB rows that are created as part of estimate processing to facilitate billing from estimates. Amounts are subject to change. TLB rows are also created after the close of a payroll period.

> **Note**
>
> If hours or units are reported in the **Quantity** field, the system uses the following basic formula to estimate gross: (TL_QUANTITY) x (COMPRATE + FACTOR_RATE_ADJ) x (FACTOR_MULT). No formula is used to estimate gross if a dollar amount is reported.

See *PeopleSoft HCM: Time & Labor*, "Understanding the Batch Process in Time Administration," Performing Rounding, Task Distribution and Estimated Gross.

General Integration Options

Field or Control	Description
Enable Status Control	Select to enable status control functionality, which enables you to control transactions based on analysis types and effective dates. By using status control options, you can stop transactions from a feeder application if a project or activity status changes on the project Status page or activity Status page. The default value is deselected. See Controlling Incoming Transactions.
Assign GL Analysis Types	Select check box to auto-assign General Ledger Analysis Types on the Journal Entry page.
Set Up GL Analysis Type Assignment	Click to access the Assign General Ledger Analysis Types page where you can define the assignment rules.

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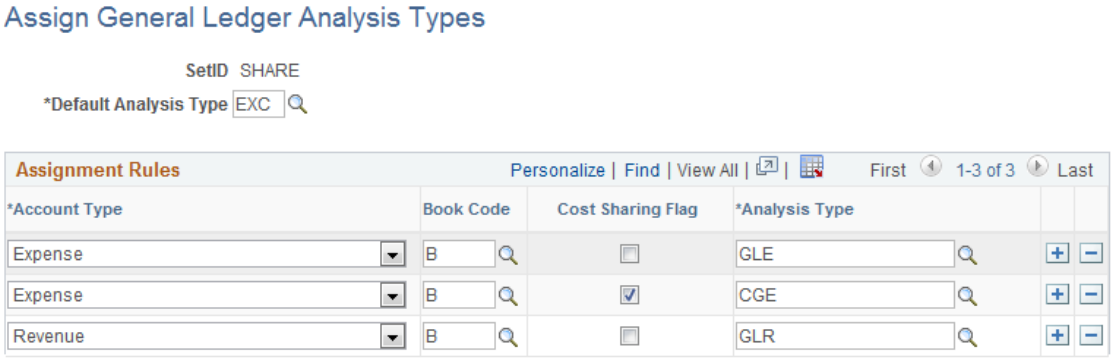
Field or Control	Description
Restrict Analysis Types	Select check box to restrict particular analysis types to allowable account types.
Set Up Restricted Analysis Types	Click to access the Restrict Analysis Types page where you can define permissible account types for the restricted analysis types.

Set Up GL Analysis Type Assignment

Use this page to define the Analysis Type to be populated by the system on the Journal Entry page based on the Account entered on each journal entry line.

This example illustrates the fields and controls on the Assign General Ledger Analysis Types page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
SetID	Displays the SetID, which is controlled by the GL Business Unit field on the Journal Entry page.
Default Analysis Type	Select a default analysis type that will be used if values matching the mapping rules are not found for the journal line.
Account Type	Select suitable account type. The account types displayed on this page are associated with the journal entry transaction line account. These values are dependent on the definition of Account Types when the accounts are set up.
Book Code	Select book code that is associated with the account. **Note:** This field is visible only if the Book Code check box is selected on the Installation Options — Overall page.
Cost Sharing Flag	Select check box if the journal entry line transaction is cost sharing. **Note:** This check box appears only if Grants is installed in the system.

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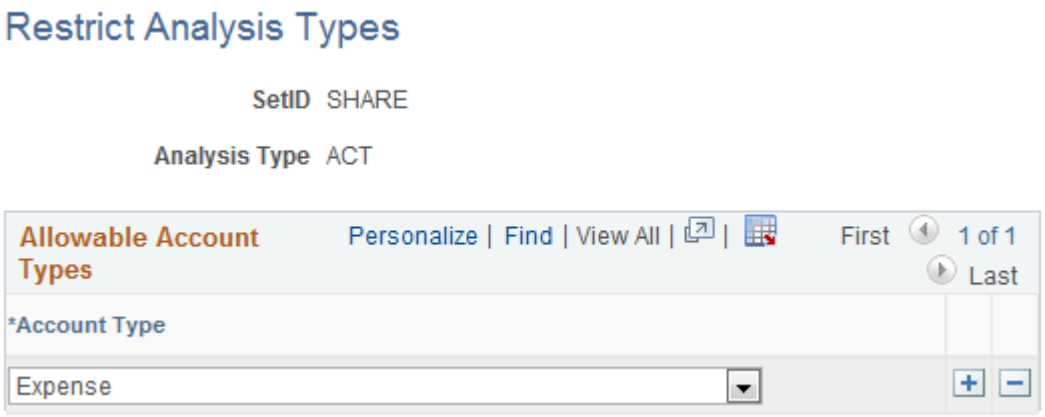
Field or Control	Description
Analysis Type	Click the prompt button to select the analysis type to be assigned. On clicking the prompt button the analysis types displayed are a list of all analysis types in the GL analysis group.

Set Up Restricted Analysis Types

Use this page to define the allowable Account Types that can be used when entering transactions from systems that feed into Project Costing for a restricted Analysis Type.

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



Field or Control	Description
SetID	Displays the SetID of the restricted analysis type, which is controlled by PC Business Unit field.
Analysis Type	Displays the analysis type that is restricted.
Account Type	Select the account type(s) that is(are) allowable for the restricted analysis type. The account type values are dependent on the definition of Account Types when accounts are set up.

> **Note**
>
> The Assign GL Analysis Types and Restrict Analysis Types functionalities are applicable only for online transactions and not for batch transactions entered through Project Costing or third party applications.

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Time and Labor Integration

Field or Control	Description
Load Time Automatically	Select for PeopleSoft Time and Labor to publish time and labor actuals PAY rows to the Project Transaction table (PROJ_RESOURCE) as soon as payroll is complete. Transaction rows are sent to PeopleSoft Project Costing if: • The row contains a value for PC business unit, project ID, and activity ID. • The TRC is eligible to be sent to PeopleSoft Project Costing (meaning that the **Don't Send to Project Costing** option is not activated for the TRC). If you *do not* select **Load Time Automatically,** you must schedule a process to load data into the Project Transaction table from staging tables.

> **Note**
>
> Actuals are loaded automatically. Estimates are requested.

Related Topics

- Types of Labor Costs that Time and Labor Calculates
  These two types of labor costs—gross estimated amounts and labor distribution amounts—are calculated in PeopleSoft Time and Labor:

Time and Labor Installation Page

Use the TL Installation page (TL_INSTALLATION) to configure options in PeopleSoft Time and Labor to integrate with PeopleSoft Project Costing.

Navigation:

Set Up HCM, and then **Install**, and then **Product and Country Specific**, and then **Time and Labor Installation**, and then **TL Installation**

Field or Control	Description
Interface with PS/Projects (Interface with PeopleSoft Project Costing)	Select this option, and the system automatically selects the **Calculate Estimated Gross** check box that tells the system to calculate the estimated costs associated with payable time when you run the Time Administration process.

See *PeopleSoft HCM: Time & Labor*"Setting Up Basic Tables," Setting Up System Defaults and Loading Dates.

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Project Costing Options Page (for Time and Labor integration)

Use the Project Costing Options page (BUS_UNIT_OPT_PC) to specify options in the Time and Labor Interface group box to integrate with PeopleSoft Time and Labor.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Setup PC BU Options**

Related Topics

- Defining Project Options
  To define project options for business units, use the Project Costing Options component (PC_BUS_UNIT_OPT). Use the Project Costing Business Unit Options component interface (PROJECT_BU_OPTIONS) to load data into the tables for this component.

Populating Time and Labor Tables with PeopleSoft Project Costing Data

Integration between PeopleSoft Project Costing and PeopleSoft Time and Labor requires that information be present in both the Financials database and the HCM database for the system to operate properly.

Viewing Project Prompt Tables in Time and Labor

These tables in PeopleSoft Time and Labor are populated by integration with PeopleSoft Project Costing:

- PC Business Unit (BUS_UNIT_TBL_PC)
- Operational Projects (PROJECT)
- Project Activities (PROJ_ACTIVITY)
- Project Resource Type (PROJ_RES_TYPE)
- Project Resource Category (PROJ_CATG_TBL)
- Project Resource SubCategory (PROJ_SUBCAT_TBL)
- Project Team Member (PROJECT_TEAM)

You can view, but not modify, these tables in PeopleSoft Time and Labor. The PeopleSoft Time and Labor system receives the units of measure table and tableset control tables that contain SetID synchronization from PeopleSoft Project Costing.

The system uses application messaging to synchronize prompt tables between the Financials and HCM databases.

Setting Up Task groups and Workgroups

After you populate project prompt tables, you set up task profile templates, task profiles, taskgroups, and workgroups in PeopleSoft Time and Labor to track time for the projects, activities, business units, resource types, resource categories, and resource subcategories in PeopleSoft Project Costing.

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Important

You must set up a task profile template in PeopleSoft Time and Labor that contains valid values for these fields: Project Costing Business Unit (BUSINESS_UNIT_PC), Project ID (PROJECT_ID), Activity ID (ACTIVITY_ID), Source Type (RESOURCE_TYPE), Category (RESOURCE_CATEGORY), and Subcategory (RESOURCE_SUB_CAT).

Populating PeopleSoft Project Costing Tables with Employee Data

Regular employees and contractors are hired in HCM and entered as time and labor employees and contractors. Tables in PeopleSoft Project Costing are populated with employee data from your human resources system using EIPs.

Related Topics

- Defining Project Options
  To define project options for business units, use the Project Costing Options component (PC_BUS_UNIT_OPT). Use the Project Costing Business Unit Options component interface (PROJECT_BU_OPTIONS) to load data into the tables for this component.

Reviewing and Loading Data to PeopleSoft Project Costing Tables

Pages Used to Review and Load Data to PeopleSoft Project Costing Tables

Page Name	Definition Name	Usage
Time and Labor Interface Page	INTFC_PROJ_TL_01	Review data that is moved from the HCM database to the Project Time and Labor Interface staging tables in the Financials database before it is loaded into the Project Transaction table.
Time and Labor Page	PC_TL_TO_PC	Run the Time and Labor to Project Costing Application Engine process (PC_TL_TO_PC) that moves time and labor data from the Project Time and Labor Interface staging tables into the Project Transaction table.
Transaction List Page	PROJECT_EXPRESSG	View PeopleSoft Time and Labor data in the Project Transaction table.

Time and Labor Interface Page

Use the Time and Labor Interface page (INTFC_PROJ_TL_01) to review data that is moved from the HCM database to the Project Time and Labor Interface staging tables in the Financials database before it is loaded into the Project Transaction table.

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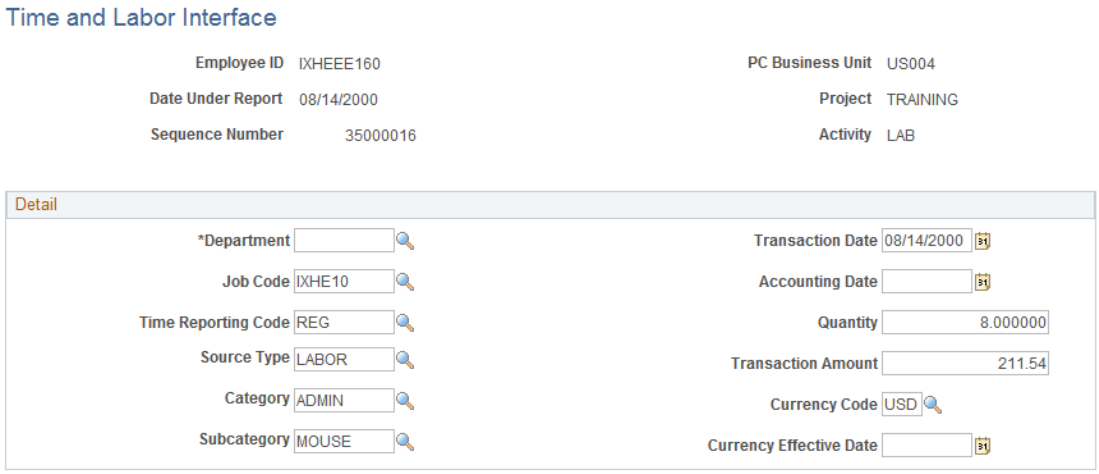
Navigation:

Project Costing, and then **Review Costs**, and then **Time and Labor Interface**, and then **Time and Labor Interface**

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



Make any necessary adjustments to transactions brought over from PeopleSoft Time and Labor before moving them to the Project Transaction table.

Field or Control	Description
Department	Department ID from PeopleSoft Time and Labor.
Transaction Date	Date for which work was reported in PeopleSoft Time and Labor.
Accounting Date	Pay period ending date.
Time Reporting Code	Element of compensation or group of several elements in which the system collects labor data, hours, amounts, or units worked.
Quantity	Number of hours worked. This field is blank if it is not applicable based on your PeopleSoft Time and Labor setup.
Transaction Currency	Currency in which the labor transaction is reported. This value is maintained in the **Foreign Currency** field.
Transaction Amount	Transaction amount that reflects estimated or actual labor cost. When actual cost processing occurs, the multicurrency engine converts this amount to the project business unit amount based on the project business unit's base currency.

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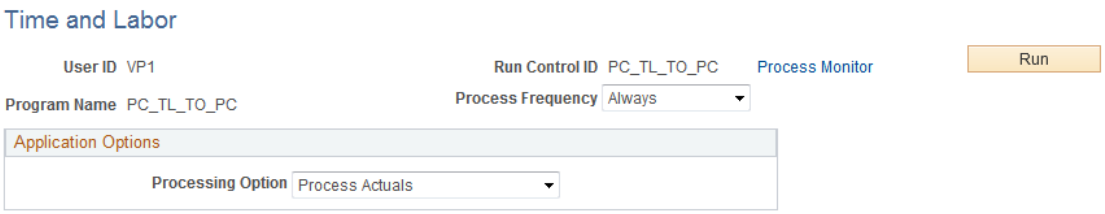
Time and Labor Page

Use the Time and Labor page (PC_TL_TO_PC) to run the Time and Labor to Project Costing Application Engine process (PC_TL_TO_PC) that moves time and labor data from the Project Time and Labor Interface staging tables into the Project Transaction table.

Navigation:

Project Costing, and then **Cost Collection**, and then **Cost Collect Time and Labor**

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



Use this page to select the processing option, and click **Run** to initiate the Time and Labor to Project Costing process.

Field or Control	Description
Load time from flat file	Select to import time data from a flat file. If selected, the **Flat File** group box appears. Select *Estimates* to load data from the flat file into the Project Time and Labor Interface estimates staging table (INTFC_PROJ_EST). Select *Actuals* to load data from the flat file into the Project Time and Labor Interface actuals staging table (INTFC_PROJ_ACT). Enter the flat file name and its directory path in the **File Name** field.
Process Actuals	Select to process all actuals. This option moves PeopleSoft Time and Labor data from the Project Time and Labor Interface actuals staging table into the Project Transaction table.
Request Estimates	Select to request all estimates data to be sent from the Project Time and Labor Interface estimates staging table into the Project Transaction table.

> **Note**
>
> Labor amounts that differ from the business unit currency are converted during the integration process if the appropriate exchange rates are set up.

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Loading Time from a Flat File

This process reads from the flat file and loads time to the same interface tables that are used to integrate with the PeopleSoft Time and Labor system. Two file layout objects are provided for this feature:

- PROJ_ACTUAL_TIME
- PROJ_ESTIMATED_TIME

Before running the process from the run control page, be sure that the order of time data fields in the flat file matches the order of fields in the delivered file layout definitions on a one-to-one basis. If it does not, change the order of the data fields in either the flat file or the file layout definition.

The process supports comma-separated, value files (*.csv).

Billing for Labor Transactions

When the Project Transaction table is populated with labor data, the estimated gross rows are identified with an analysis type of *TLA.* Each transaction ID on these rows has an *A* suffix. Identical rows are also created with an analysis type of *TLB* and a transaction ID suffix of *B* for billing purposes.

A subsequent run of the process, to extract estimated gross rows from PeopleSoft Time and Labor, deletes all *TLA* rows. In addition, it replaces *TLB* rows that have not created unbilled billing rows that have been billed, which is indicated by a billing distribution status of *W* (worksheet) or *D* (done), with the updated estimated gross amounts.

See also, *PeopleTools: PeopleSoft Process Scheduler*

Related Topics

- Understanding the Billing Process Flow
  The subsequent billing cycle diagram shows the flow of the billing process for rate-based contract lines. The numbered steps that are on the diagram correspond to updates that occur to these tables:
- Processing Multiple Currencies

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Integrating with Services Procurement

Understanding Integration with Services Procurement

The time entry, expense, and progress log entry components in PeopleSoft Services Procurement use the same standard integration functionality as other PeopleSoft applications that integrate with PeopleSoft Project Costing. This enables you to incorporate time, expense, and progress log data into the PeopleSoft Project Costing application from PeopleSoft Services Procurement.

Importing time, expense, and progress log data from PeopleSoft Services Procurement to PeopleSoft Project Costing is a three step process:

1. Enter project ChartField information with PeopleSoft Services Procurement requisition or work order distribution lines.

   The PeopleSoft Services Procurement system uses requisitions and work orders to accumulate time (including assignment incidents), expense, and progress information. You can accumulate charges against projects based on actual costs or a percentage allocation.

2. In PeopleSoft Services Procurement, specify the export parameters on the Export Services to Projects page and run the Export to Projects Application Engine process (SPA_PROJ_EXP).

   The system selects approved transaction data from the time and expense tables and the process log table based on criteria that you select on the run control page, and generates rows in the Project Transaction staging table (SP_PROJ_RES_STG) for daily time entered, individual expenses, and progress logs. Note that:

   - For time, expense, and progress data, the process sends only those rows to PeopleSoft Project Costing that contain a project business unit, project, and activity.
   - The Business Unit field value (BUSINESS_UNIT) in PeopleSoft Services Procurement populates the PO (purchase order) Business Unit field (BUSINESS_UNIT_PO) in PeopleSoft Project Costing.
   - PeopleSoft Services Procurement sends assignment incident transactions to PeopleSoft Project Costing as expense transactions.
   - The Time Quantity (TIME_QUANTITY) and Unit of Measure (UNIT_OF_MEASURE) fields are blank for expense, progress log, and assignment incident transactions from PeopleSoft Services Procurement.

3. In PeopleSoft Project Costing, run the Services Procurement to Project Costing Application Engine process (PC_SP_TO_PC) to load the staged data into the Project Transaction table (PROJ_RESOURCE).

Related Topics

- PeopleSoft Services Procurement: Integrating with PeopleSoft Project Costing

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Prerequisite

Before exporting time, expense, and progress log information to Project Costing, ensure that the following fields are set as you want them in the **System Analysis Types** group box on the Project Costing Integration page (Set Up Financials/Supply Chain, Install, Installation Options and select **Project Costing Integration). The system is delivered with default settings, but you can change them:**

- **Expenses**
- **Mobile Time / Expense**
- **sPro Assignment Incident**
- **sPro Progress Log**

See Application Fundamentals: Installation Options - Project Costing Integration Page.

Importing Time, Expense, and Progress Log Data into PeopleSoft Project Costing

Pages Used to Integrate Time and Expense Data into PeopleSoft Project Costing

Page Name	Definition Name	Usage
Export Services to Projects Page	SPF_PROJ_EXP	Run the Export Time and Expenses to Staging table for Projects process to export approved time, expense, and progress log data in PeopleSoft Services Procurement to the Project Transaction staging table.
Services Procurement Page	PC_SP_TO_PC	Import approved time, expense, and progress log data into PeopleSoft Project Costing from PeopleSoft Services Procurement.

Export Services to Projects Page

Use the Export Services to Projects page (SPF_PROJ_EXP) to run the Export Time and Expenses to Staging table for Projects process to export approved time, expense, and progress log data in PeopleSoft Services Procurement to the Project Transaction staging table.

Navigation:

Services Procurement, and then **Manage Projects and Activities**, and then **Export Services to Projects**

See PeopleSoft Services Procurement: Integrating with PeopleSoft Project Costing.

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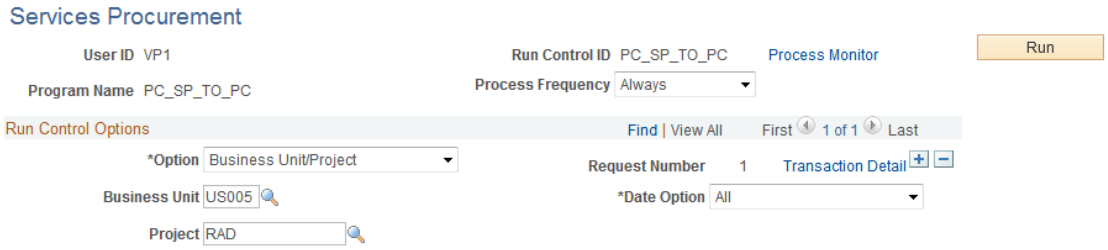
Services Procurement Page

Use the Services Procurement page (PC_SP_TO_PC) to import approved time, expense, and progress log data into PeopleSoft Project Costing from PeopleSoft Services Procurement.

Navigation:

Project Costing, and then **Cost Collection**, and then **Cost Collect sPro**

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



Field or Control	Description
Option	Select an option to import time, expense, and progress log entries for all activities or for specific ones. Options are: • *All:* Imports all approved time, expense, and progress log transactions into the Project Transaction table (PROJ_RESOURCE) that are staged in the Project Resource staging table. • *Business Unit:* Imports approved time, expense, and progress log transactions for the selected business unit. • *Business Unit/Project:* Imports approved time, expense, and progress log transactions for the selected business unit and project only. • *Business Unit/Project/Activity:* Imports approved time, expense, and progress log transactions for the selected business unit, project, and activity only.
Date Option	Select *Accounting Date, All,* or *Transaction Date* for the system to use to determine eligible transactions. For example, if you select *Accounting Date* and enter a date range of December 1 to December 31, the system selects only those transactions in the Project Transaction staging table with an accounting date that falls in the range.
From Date and **Through Date**	Enter the range of dates to process based on the selected **Date Option.**

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Field or Control	Description
Run	Click to initiate the Services Procurement to Project Costing process and import the specified time, expense, and progress log data to the Project Transaction table.

During the integration process, the system converts expense amounts that differ from the business unit currency if the appropriate exchange rates are set up.

When the process completes, you can view time, expense, and progress log transactions on the Transaction List page that are imported into the Project Transaction table as follows:

- Expenses appear as transactions with the analysis type that is specified on the Installation Options - Project Costing Integration page for Expenses.

  The delivered default analysis type is *ACT.*

- Time reports appear as transactions with the analysis type specified on the Installation Options - Project Costing Integration page for Mobile Time / Expense.

  The delivered default analysis type is *TLX.*

- Incident based assignments from time sheets appear as transactions with the analysis type specified on the Installation Options - Project Costing Integration page for sPro Assignment Incident.

  The delivered default analysis type is *INC.*

- Progress logs appear as transactions with the analysis type specified on the Installation Options - Project Costing Integration page for sPro Progress Log.

  The delivered default analysis type is *SPL.*

> **Note**
>
> You cannot drill down to the source transactions in PeopleSoft Services Procurement by using the **Drill to Source** icon on the Transaction List page.

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21

Integrating with PeopleSoft General Ledger

Understanding Integration with PeopleSoft General Ledger

PeopleSoft Project Costing has a built-in integration with PeopleSoft General Ledger by way of the Journal Generator Application Engine process (FS_JGEN). The Journal Generator process transforms accounting entries into journal entries that you can post to PeopleSoft General Ledger.

To move project transactions from PeopleSoft Project Costing to PeopleSoft General Ledger, you:

1. Distribute the transactions within PeopleSoft Project Costing based on defined accounting rules.
2. Send the transactions to PeopleSoft General Ledger.

In PeopleSoft General Ledger:

- The accounting entry definition identifies where the accounting entries that are generated by the Process Project Accounting Application Engine process (PSA_ACCTGGL) are stored, and maps fields on the accounting entry table to fields in the general ledger.
- The journal generator template defines the data on the journal header and journal lines for each transaction type that the Journal Generator process creates for posting to PeopleSoft General Ledger.
- The Journal Generator process transforms accounting entries into PeopleSoft General Ledger journals, and optionally can edit and post journals and perform Commitment Control budget checks.

Accounting Entry Definitions

The accounting entry definitions used with the integration between PeopleSoft Project Costing and PeopleSoft General Ledger are Projects Definition (PCDEFN) and Contracts-Projects Definition (CAPCDEFN). These accounting entry definitions map the name of accounting entry fields for project business unit, project ID, and activity ID to specific general ledger (GL) ChartFields.

Based on your ChartField configuration options, and the options that you select in the **Input Control** group box on the Project Costing Options page, you may be required to also map the source type, category, and subcategory accounting entry field names in the accounting entry definition. For example, if transactions require a category and subcategory, the accounting entry definition should contain a mapping for category and subcategory.

Related Topics

- Defining Project Options
  To define project options for business units, use the Project Costing Options component (PC_BUS_UNIT_OPT). Use the Project Costing Business Unit Options component interface (PROJECT_BU_OPTIONS) to load data into the tables for this component.
- Application Fundamentals: Understanding Journal Generator

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- Application Fundamentals: Setting Up for Journal Generator
- Application Fundamentals: Generating Journal Entries

Understanding Data Flows

Most information that is stored in PeopleSoft Project Costing originates from feeder systems such as other PeopleSoft applications and third-party applications. Feeder system data is posted to PeopleSoft General Ledger and passed to PeopleSoft Project Costing through Application Engine processes.

Two ways are available to implement the flow of enterprise data:

- Post data directly from feeder systems to PeopleSoft Project Costing and PeopleSoft General Ledger simultaneously (dual feed).

  This is the recommended method of posting data to PeopleSoft General Ledger.
- Post data from feeder systems directly into PeopleSoft Project Costing, and then post from Project Costing to General Ledger (single feed).

Using a Dual-Feed Data System

This method of posting data from feeder systems simultaneously to PeopleSoft Project Costing and PeopleSoft General Ledger is recommended because:

- You can post to PeopleSoft Project Costing as often as necessary to keep projects current.
- Only project-related transactions are posted to PeopleSoft Project Costing.

  Standard accounting feeds from feeder systems to PeopleSoft General Ledger are maintained for all transactions.

This diagram illustrates the dual-feed enterprise data flow system:

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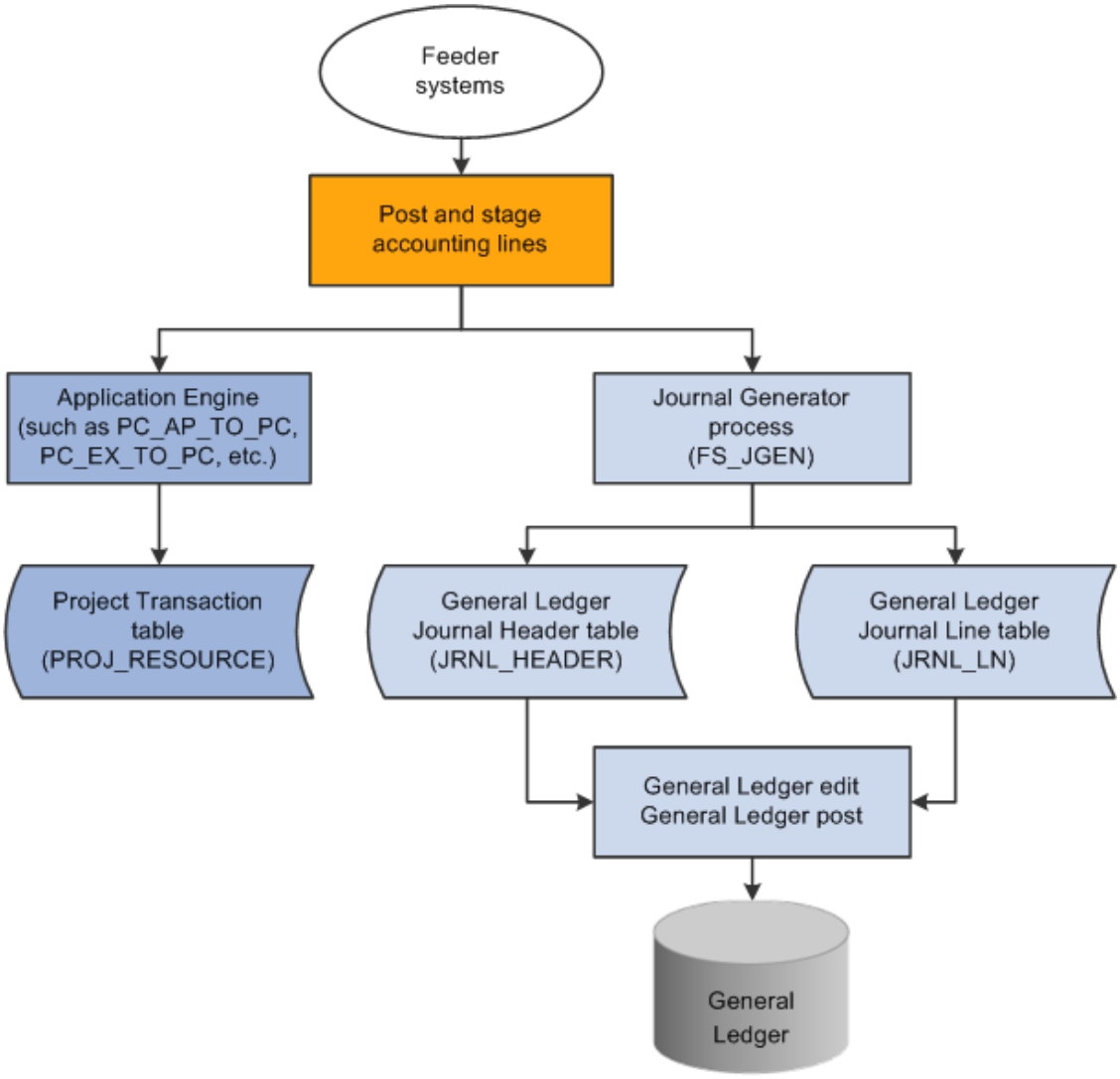

Using a Single-Feed Data System

Consider the method of posting from feeder systems to PeopleSoft Project Costing, which then posts to PeopleSoft General Ledger, under these circumstances:

- PeopleSoft Project Costing and PeopleSoft General Ledger are used with few or no other PeopleSoft applications.
- Transactions are posted to PeopleSoft Project Costing from third-party feeder systems, and Project Costing posts to PeopleSoft General Ledger using the Journal Generator.
- Transactions with accounting implications are manually entered or calculated in PeopleSoft Project Costing and need to be distributed using the Journal Generator.

  Examples of this are the calculation of interest costs on construction of assets or project-to-project allocations.

This diagram illustrates data moving from feeder systems directly into PeopleSoft Project Costing and then posting to PeopleSoft General Ledger:

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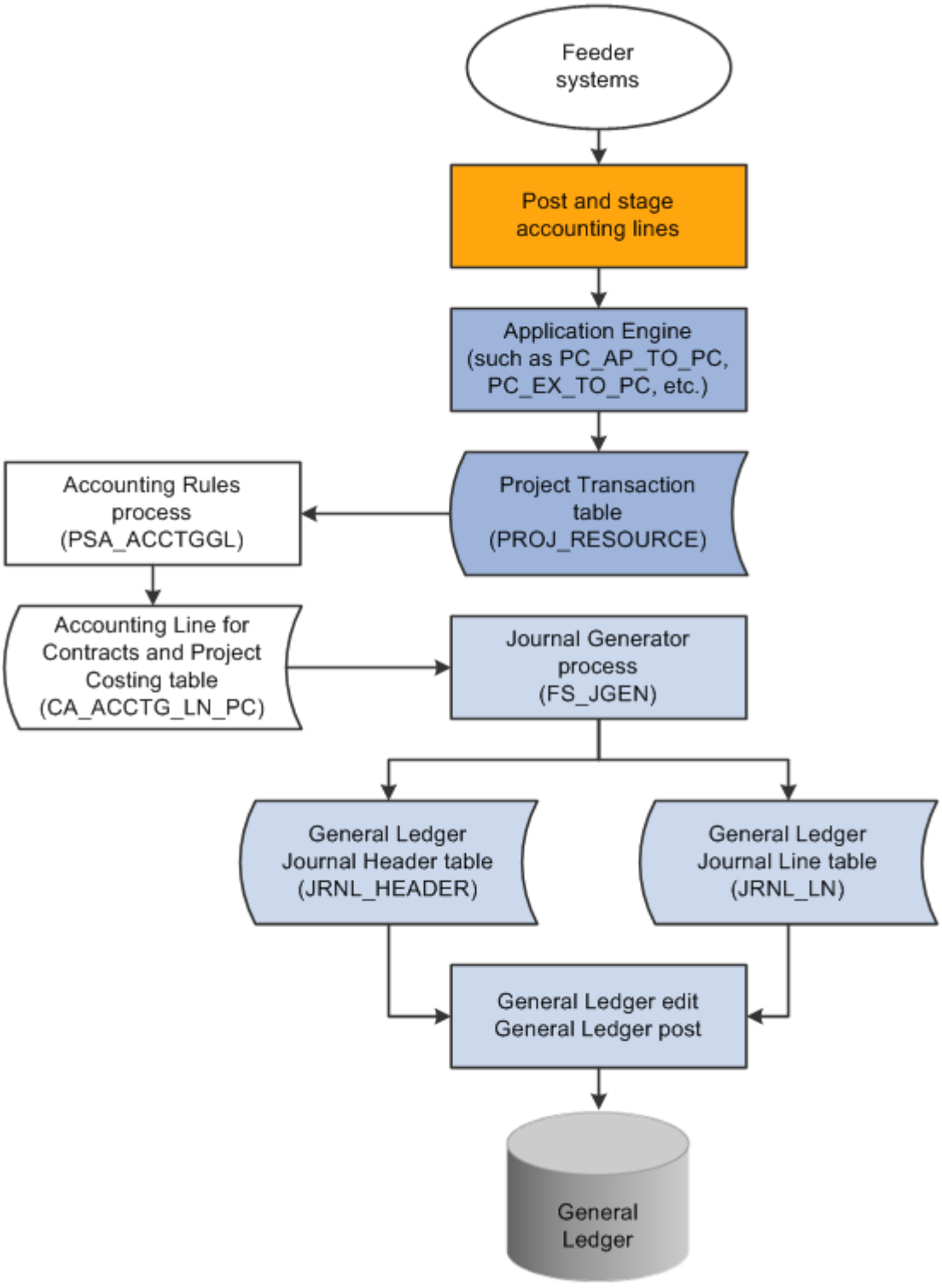

Implementing the Data Flow System

Distribution statuses indicate where the transaction is in its life cycle. For example, a general ledger distribution status of *D* (distributed) indicates that PeopleSoft Project Costing has distributed the transaction row to PeopleSoft General Ledger by means of the Process Project Accounting process. The system updates distribution statuses as the transaction flows from

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one system to the next. Application Engines look to the distribution status to determine which rows are eligible for integration to feeder systems.

Understanding Journal Line Retrieval from General Ledger

You can create project transactions from journal entries that are posted to PeopleSoft General Ledger by using the General Ledger to Project Costing Application Engine process (PC_GL_TO_PC). The journal entries must be in a posted status and must include all required project ChartFields.

To distribute the amount of journal entries to multiple projects, use the Allocations feature.

Use the ‘Setup Integration Exclusions’ to selectively apply criteria to exclude transactions from the integration into Project Costing. For more information, see Excluding Transactions from Integrations into Project Costing.

Related Topics

- Defining Project Options
  To define project options for business units, use the Project Costing Options component (PC_BUS_UNIT_OPT). Use the Project Costing Business Unit Options component interface (PROJECT_BU_OPTIONS) to load data into the tables for this component.
- Understanding Allocations in PeopleSoft Project Costing
  There are two basic types of allocations that can be performed in PeopleSoft Project Costing by the Allocations process (FS_ALLC):
- Allocating Costs from Project-to-Project
- Allocating Costs from General Ledger
  You can use the Allocations process to distribute revenue, expense, and statistical quantities from accounts in PeopleSoft General Ledger to one or more projects in PeopleSoft Project Costing. In these situations, the allocation pool is derived from a ledger instead of from a PeopleSoft Project Costing table. Follow similar steps to set up allocations from general ledger accounts as you do to set up project-to-project allocations.
- Application Fundamentals: Using Standard ChartField Configuration

Processing Single-Sided Transactions

Pages Used to Process Single-Sided Transactions

Page Name	Definition Name	Usage
Add Transactions Page	INTFC_PROJ_EXPR_02	Enter transactions for a project activity.

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Page Name	Definition Name	Usage
Process Project Accounting Page	RUN_PSA_ACCTGGL	Run the Process Project Accounting process to create double-sided accounting entries. When you are using PeopleSoft Project Costing in a multicurrency environment, the Process Project Accounting process recalculates the base amount for each entry in the general ledger currency. The general ledger currency may differ from the original transaction base currency.
View/Delete Pending Entries Page	PC_ACCTG_LN_DTL	View accounting distributions. Review PeopleSoft Project Costing accounting lines that the Process Project Accounting process creates before they are sent to PeopleSoft General Ledger by the Journal Generator process. This page excludes PeopleSoft Contracts revenue lines.
Generate Journals Request Page	JRNL_GEN_REQUEST	Run the Journal Generator process to distribute transactions to PeopleSoft General Ledger.
Review Accounting History Page	PC_ACCTG_JNL_DTL	Review PeopleSoft Project Costing accounting lines after they have been sent to PeopleSoft General Ledger by using the Journal Generator process.

Understanding Single-Sided Transactions

The term single-sided transactions refers to transaction rows that either have no accounting implications or have yet to be matched with a corresponding debit or credit entry before being posted to PeopleSoft General Ledger. You can enter single-sided transactions in PeopleSoft Project Costing by using the Add Transactions page, through integration with other PeopleSoft or third-party applications, or by using PeopleSoft Project Costing-specific features such as interest calculation.

Accounting rules determine the journal lines that the system creates from project transactions for all single-sided transactions that are sent to PeopleSoft General Ledger. The Process Project Accounting process uses the accounting rules to create double-sided entries, which are placed in the Accounting Line for Contracts and Project Costing table (CA_ACCTG_LN_PC).

View/Delete Pending Entries Page

Use the View/Delete Pending Entries page (PC_ACCTG_LN_DTL) to view accounting distributions.

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Review PeopleSoft Project Costing accounting lines that the Process Project Accounting process creates before they are sent to PeopleSoft General Ledger by the Journal Generator process. This page excludes PeopleSoft Contracts revenue lines.

Navigation:

Project Costing, and then **Accounting**, and then **Review Pending Acctg Entries**

Use this page to view all transactions in the Accounting Line for Contracts and Project Costing table, excluding PeopleSoft Contracts revenue lines, before they are sent to PeopleSoft General Ledger by the Journal Generator process. To delete a row, select the corresponding **Delete** check box, and click **Confirm Rows to Delete.**

> **Note**
>
> If you use PeopleSoft Project Costing in a multicurrency environment, each line reflects the original currency amount in the **Source Amount** field (FOREIGN_AMOUNT), and the converted currency in the **Project Amount** field (RESOURCE_AMOUNT). The converted currency is based on the currency code defined at the project business unit level.

Generate Journals Request Page

Use the Generate Journals Request page (JRNL_GEN_REQUEST) to run the Journal Generator process to distribute transactions to PeopleSoft General Ledger.

Navigation:

General Ledger, and then **Journals**, and then **Subsystem Journals**, and then **Generate Journals**, and then **Generate Journals Request**

You can distribute transactions to PeopleSoft General Ledger after the Process Project Accounting process populates the Accounting Line for Contracts and Project Costing table.

To distribute transactions to PeopleSoft General Ledger:

1. Enter a run control ID, such as *PC_COSTS.*
2. Enter the accounting definition name, such as *PCDEFN.*

This process distributes transactions to the Journal Header Data table (JRNL_HEADER) and the Journal Line Data table (JRNL_LN) in PeopleSoft General Ledger.

Related Topics

- Processing Multiple Currencies
- Application Fundamentals: Understanding Journal Generator
- Application Fundamentals: Setting Up for Journal Generator
- Application Fundamentals: Generating Journal Entries

Review Accounting History Page

Use the Review Accounting History page (PC_ACCTG_JNL_DTL) to review PeopleSoft Project Costing accounting lines after they have been sent to PeopleSoft General Ledger by using the Journal Generator process.

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Navigation:

Project Costing, and then **Accounting**, and then **Review Accounting History**, and then **Review Accounting History**

This page displays only rows from the Accounting Line for Contracts and Project Costing table that contain a journal ID. The page is display-only.

Field or Control	Description
Journal ID	Displays journal data at the top of the page from the Journal Line Data table.
GL Journal	Click to access the Journal Lines page (JOURNAL_LN_FS), where you can view all journal lines for the journal ID.
Projects Information	PeopleSoft Project Costing data that appears in this grid comes from the Accounting Line for Contracts and Project Costing table.

Creating Double-Sided Transactions

Double-sided transactions are created in PeopleSoft Project Costing when you:

- Adjust a transaction on the Transaction Adjustment page in PeopleSoft Project Costing.
- Create double-sided entries from single-sided transactions.

Pages Used to Create Double-Sided Transactions

Page Name	Definition Name	Usage
Transaction Adjustment Page	PROJ_RES_ADJUST	Adjust all or part of a transaction quantity and amount.
Generate Journals Request Page	JRNL_GEN_REQUEST	Run the Journal Generator process to distribute transactions to PeopleSoft General Ledger.

Transaction Adjustment Page

Use the Transaction Adjustment page (PROJ_RES_ADJUST) to adjust all or part of a transaction quantity and amount.

Navigation:

Project Costing, and then **Transaction Definitions**, and then **Transaction Adjustment**, and then **Transaction Adjustment**

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

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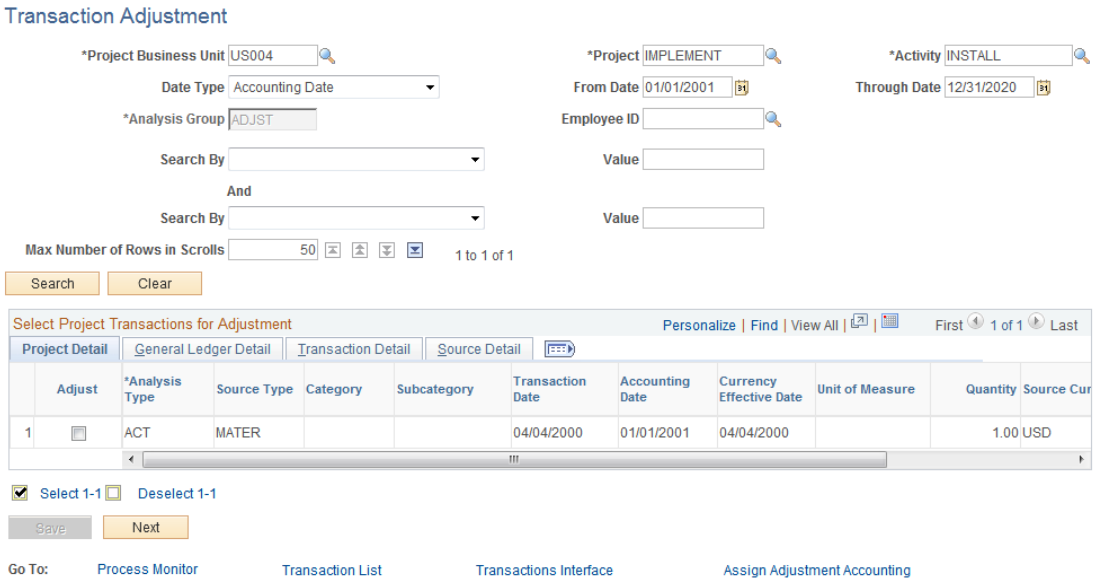

Use this page to select transactions to adjust all or part of the transaction quantity or amount after the transaction is added to an activity. The system retains the original row in the Project Transaction table (PROJ_RESOURCE) and creates a new row for the adjustment.

Only those transaction rows that have an analysis type that belongs to the ADJST analysis group (such as the *ACT* analysis type) are eligible for transaction adjustments. Rows are not eligible for adjustment if any of the following situations exist:

- The **Billing Distribution Status** field value for the row is *D* (distributed; already billed) or *W* (billing worksheet).
- The **GL Distribution Status** field value for the row is *G* (generated) or *D* (distributed).
- The **Asset Management Distribution Status** field value for the row is *D* (distributed), *V* (reversed), or *P* (pending).
- The system source is *PRP* (priced for billing), *PRR* (priced for revenue), or *PRC* (priced for costing).

Select a transaction row and click the **Next** button to access the Choose type of adjustment page, where you enter the new quantity and amount for the transaction. From the Choose type of adjustment page you access the Transaction Adjustment page for new transactions (PROJ_RES_ADJ_NEWCF), where you select ChartFields for the new transaction row that is created during the adjustment process.

When you click **Next** on the Transaction Adjustment page, a message appears if you selected rows that were previously adjusted. You can either continue with the adjustment, or return to the Transaction Adjustment page with your selection cleared on the previously adjusted rows.

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> **Note**
>
> The **Ledger Distribution** status selected on the Transaction Adjustment page for new transactions determines whether accounting lines are generated when you save the adjustment. If you select a **Ledger Distribution** status of *Ignore,* the transaction is not sent to PeopleSoft General Ledger, and all GL ChartFields become optional selections. If you select a **Ledger Distribution** status of *Not Done,* the system automatically enters the adjustments into the Accounting Line for Contracts and Project Costing table as double-sided transactions, and enters the adjusting entries into the Project Transaction table.

The Reviewing and Adjusting Project Cost Transactions topic discusses the pages used to select types of adjustments (such as amount, quantity, and ChartField) and enter, review, and finalize adjustments.

Generate Journals Request Page

Use the Generate Journals Request page (JRNL_GEN_REQUEST) to run the Journal Generator process to distribute double-sided transactions to PeopleSoft General Ledger.

Navigation:

General Ledger, and then **Journals**, and then **Subsystem Journals**, and then **Generate Journals**, and then **Generate Journals Request**

Typically, transactions are distributed to PeopleSoft General Ledger by the Process Project Accounting process. Adjusted transactions, however, can be distributed as double-sided transactions to PeopleSoft General Ledger without accounting rules processing.

Use this page to distribute double-sided transactions in the same way that you use it to distribute transactions that have gone through accounting rules processing. To distinguish the run control ID, enter a value such as *PC_ADJUST.*

Related Topics

- Viewing and Adding Transactions
- Processing Multiple Currencies
- Application Fundamentals: Understanding Journal Generator
- Application Fundamentals: Setting Up for Journal Generator
- Application Fundamentals: Generating Journal Entries
- Processing Multiple Currencies

Updating Project GL Journal Information

This section provides the process to update the Project Costing PROJ_RESOURCE table for transactions originating in Project Costing and sent to General Ledger for posting.

The fiscal year, accounting period and journal date is updated with that used in General Ledger to streamline the monthly reconciliation of transactional data across the Project Costing and General Ledger applications.

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Page Used to Update Project GL Journal Information

Page Name	Definition Name	Usage
Update Project GL Journal Info Page	RUN_PSA_UPD_JRNL	Update the year, period and journal date in Project Costing to match that used in General Ledger.

Update Project GL Journal Info Page

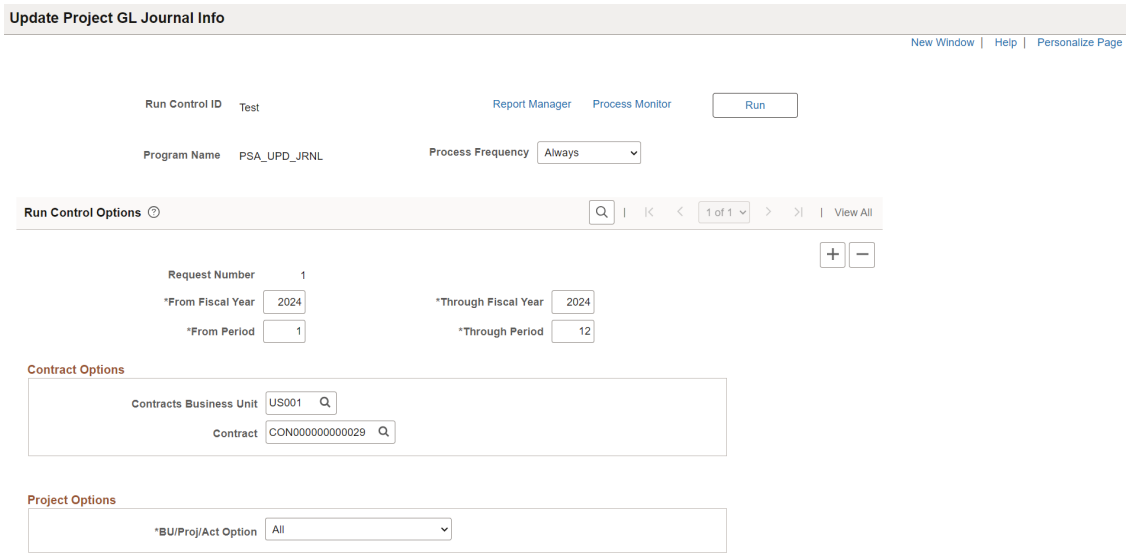
Use the Update Project GL Journal Info page (RUN_PSA_UPD_JRNL) to update the year, period and journal date in Project Costing to match that used in General Ledger.

Navigation:

Project Costing, and then **Accounting**, and then **Update Project GL Journal Info**

This process can also be accessed from Customer Contracts, for the customers who use Contracts to send transactions to General Ledger.

This example illustrates the fields and controls on the Update Project GL Journal Info page.



Enter run control parameters for a specific year and period or a range of periods. Transactions in the accounting lines table (CA_ACCTG_LN_PC) with the specified year and period will be evaluated. If the transaction has been journal generated, then the year, period and journal date from the CA_ACCTG_LN_PC table will be used to update the same fields in the project costing PROJ_RESOURCE table.

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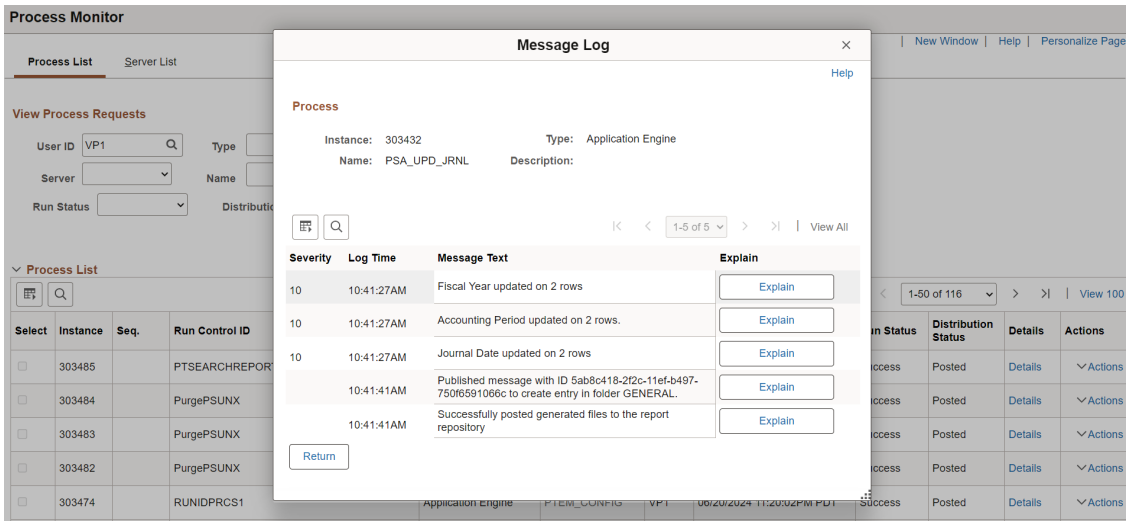
> **Note**
>
> A single transaction in proj_resource can generate multiple entries in General Ledger. For the project costing transaction to qualify for update, it must have generated entries with only one year, period and journal date. If a single transaction in proj_resource created entries posted with multiple years, periods or journal dates, then it will not be updated.

Transactions generated in prior years and periods can be updated by running the process with the older dates.

The message log in process monitor displays the number of rows updated for each of the 3 fields.

This example illustrates the fields and controls on the Message Log in process monitor page.



Retrieving Posted Journals for PeopleSoft Project Costing

Page Used to Retrieve Posted Journals for PeopleSoft Project Costing

Page Name	Definition Name	Usage
General Ledger Page	PC_GL_TO_PC	Run the General Ledger to Project Costing process to retrieve posted journal lines from PeopleSoft General Ledger for use in PeopleSoft Project Costing.

General Ledger Page

Use the General Ledger page (PC_GL_TO_PC) to run the General Ledger to Project Costing process to retrieve posted journal lines from PeopleSoft General Ledger for use in PeopleSoft Project Costing.

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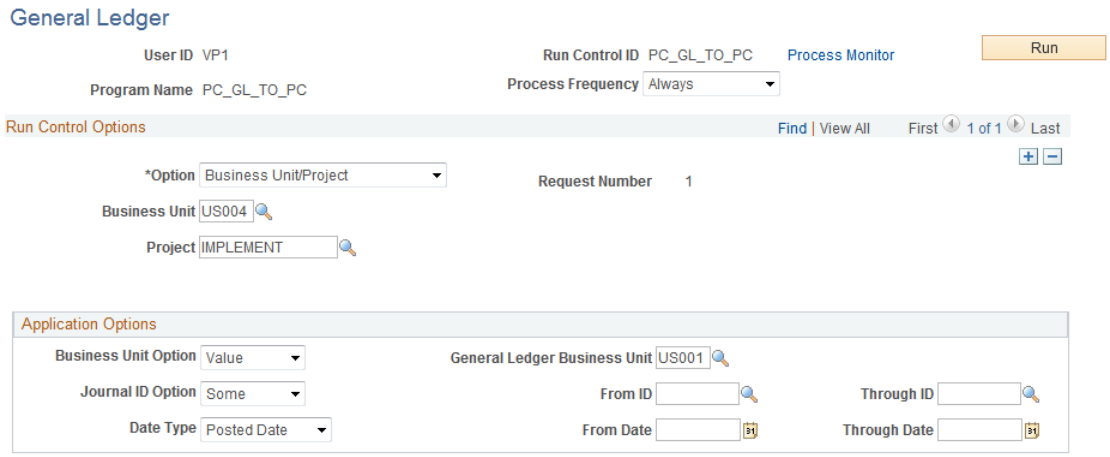
Navigation:

Project Costing, and then **Cost Collection**, and then **Cost Collect General Ledger**

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



Run Control Options

The **PC Distribution Status** field (PC_DISTRIB_STATUS) value is maintained on the journal line. If a journal entry contains multiple project business units, projects, and activities, and you retrieve only a subset of the data, you can retrieve the remaining data for that journal entry at a later date.

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Field or Control	Description
Option	Select a run control option to import general ledger journal entries for all transactions or specific transactions. Options are: • *All:* Imports journal entries for all projects. You must select this option if any journal entries contain more than one business unit. • *Business Unit:* Imports journal entries for the selected project business unit. Enter a value for **Business Unit.** Do not select this option if any journal entries contain more than one business unit. Instead, select the *All* option. • *Business Unit/Project:* Imports journal entries for the selected project business unit and project. Enter values for **Business Unit** and **Project.** Do not select this option if any journal entries contain more than one project. Instead, select the *All* or *Business Unit* option. • *Business Unit/Project/Activity:* Imports journal entries for the selected project business unit, project, and activity. Enter values for **Business Unit, Project,** and **Activity.** Do not select this option if any journal entries contain more than one activity. Instead, select the *All, Business Unit,* or *Business Unit/Project* option.

Application Options

Use these fields to further define the journal entries that you want to import into PeopleSoft Project Costing.

Field or Control	Description
Business Unit Option	Select additional filter criteria for general ledger journal entries. Options are: • *All:* Imports journal entries that belong to all general ledger business units and meet the specified run control and application options. • *Value:* Imports journal entries that belong to a particular general ledger business unit and meet the specified run control and application options.
General Ledger Business Unit	Enter the general ledger business unit for the journal entries that you want to import into PeopleSoft Project Costing. This field appears if you select *Value* in the **Business Unit Option** field.

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Field or Control	Description
Journal ID Option	Select the journal IDs of the general ledger journal entries that you want to import into PeopleSoft Project Costing. Options are: • *All:* Imports all journal entries that meet the specified run control and application options. • *Some:* Imports the selected range of journal entries that meet the specified run control and application options.
From ID and **Through ID**	Enter journal ID values to specify the range of journal entries that you want to import. To specify a single journal entry, enter a value in the **From ID** field, which also populates the **Through ID** field by default. To import a range of journal entries, override the value in the **Through ID** field by entering the maximum value in the range. These fields appear if you select *Some* in the **Journal ID Option** field.
Date Type	This field serves two purposes. It: • Filters the journal entries that you want to import into PeopleSoft Project Costing by either the journal entry posted date or accounting date. • Populates the Accounting Date field (ACCOUNTING_DT) for imported transaction rows in the Project Transaction table (PROJ_RESOURCE) with the field value of the specified date type in corresponding journal entry rows in the Journal Header Data table. **Note:** The system populates the **Transaction Date** (TRANS_DT) and **Currency Effective Date** fields (CUR_EFFDT) for imported transaction rows in the Project Transaction table with the Journal Date field value (JOURNAL_DATE) in corresponding journal entry rows in the Journal Header Data table. Select a date type and enter the date range for the journal entries that you want to import into PeopleSoft Project Costing. Options are: • *Posted Date:* Imports journal entries that have a posted date within the specified date range. Additionally, the system maps the Posted Date field value (POSTED_DATE) of journal entry rows to the **Accounting Date** field in corresponding imported transaction rows in the Project Transaction table. • *Journal Date:* Imports journal entries that have a journal date within the specified date range.

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Field or Control	Description
From Date and **Through Date**	Enter a date range to specify the journal entries that you want to import by the transaction posted or journal date. To import journal entries for one particular date, enter the date in both the **From Date** and **Through Date** fields.

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Processing Allocations in PeopleSoft Project Costing

Understanding Allocations in PeopleSoft Project Costing

There are two basic types of allocations that can be performed in PeopleSoft Project Costing by the Allocations process (FS_ALLC):

- Project-to-project allocations.
- PeopleSoft General Ledger to Project Costing allocations.

Project-to-project allocations occur entirely within PeopleSoft Project Costing. During project-to-project allocations, quantities and amounts are distributed from one or more projects to one or more projects. For example, the Housing Development project collects the storage costs for equipment used in its child projects—foundation, framing, and roofing. Storage costs are allocated to these target (child) projects using a prorata basis of material cost. The project-to-project allocation allocates dollars from one project to other projects without involving the general ledger.

You can allocate within business units (intraunit), or among business units (interunit)—such as project-to-project allocations between project business units.

In General Ledger-to-Project Costing allocations, amounts are moved from general ledger accounts and allocated to one or more projects. For example, a quality inspection team charges their labor to the general expense account posted in the general ledger. The team inspected all of the projects within Housing Development—foundation, framing, and roofing. The General Ledger-to-Project Costing allocation prorates labor expense dollars from the general expense account to the projects receiving the quality inspection.

Allocating Costs from Project-to-Project

Pages Used to Allocate Costs from Project-to-Project

Page Name	Definition Name	Usage
Define Allocation Step - Type Page	ALLOC_CALC_OPTN	Define the allocation type and any special arithmetic operations that you want to perform by using the pool and basis. Select a transaction code for use in interunit and intraunit allocations.
Define Allocation Step - Pool Page	ALLOC_POOL	Define the allocation pool record, selection criteria, and selection method.

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Page Name	Definition Name	Usage
Define Allocation Step - Basis Page	ALLOC_BASIS	Specify how and in what proportion the pool amounts are distributed to the various targets.
Define Allocation Step - Target Page	ALLOC_TARGET	Define the destination for the allocation or target record and target field values.
Define Allocation Step - Offset Page	ALLOC_OFFSET	Define the offset entry that balances the target.
Define Allocation Step - Output Options Page	ALLOC_OUT_JRL_OPTN	Define journal output options if the target or offset record is *Journal Records*. Define table output options if the target or offset record is *Any Table*.
Define Allocation Step - Round Options Page	ALLOC_ROUND_OPTN	Define the method for rounding the allocation amount and distributing odd cents for the *Spread Evenly, Allocate of Fixed Basis,* and *Prorata with Record Basis* allocation types.
Define Allocation Step - Batch Records Page	ALLOC_RECNAME	Specify the batch temporary tables that the Allocations process uses.
Define Allocation Step - Amount Fields Page	ALLOC_AMOUNT	Define the amount field mapping between the pool, basis, target, and offset records.
Allocation Request Page	ALLOC_REQUEST	Specify parameters and run the Allocations process.

Example of Project-to-Project Allocation Step

PeopleSoft provides sample data that contains a project-to-project allocation step called PC_TO_PC that has a SetID of SHARE. This allocation step is an example of periodically allocating costs to activities based on the total costs that are incurred for each of the activities. In this example, the BUILDING project collects storage costs that are associated with a child project COMPLEX and its activities EXCAVATION, FOUNDATION, and STRUCTURAL.

> **Note**
>
> This topic discusses the field values that are required to set up the example PC_TO_PC allocation step. A detailed discussion of the Define Allocation Step component (ALLOCATIONS) is in the Application Fundamentals: Defining Allocation Process Steps topic.

Project Activity Costs Accumulation and Allocation

The total storage cost collected in the current period by project BUILDING for its child project COMPLEX is 1,000,000 USD. This is a sum of all storage cost transactions associated with

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project BUILDING in business unit US003. This pool amount is to be distributed to the child project COMPLEX and its three activities. This table shows the total costs currently incurred by each of the activities within project COMPLEX:

Activity	Cost Incurred
EXCAVATION	200,000 USD (25% of total)
FOUNDATION	200,000 USD (25% of total)
STRUCTURAL	400,000 USD (50% of total)

When you run the PC_TO_PC allocation example, the system distributes the 1,000,000 USD pool amount among the three activities of project COMPLEX with the same ratio that currently exists between them, as illustrated in this table:

Activity	New Distribution Rows Based on Allocations
EXCAVATION	250,000 USD (25% of 1,000,000 USD)
FOUNDATION	250,000 USD (25% of 1,000,000 USD)
STRUCTURAL	500,000 USD (50% of 1,000,000 USD)

This diagram illustrates the process of allocating activity costs using the PC_TO_PC allocation step:

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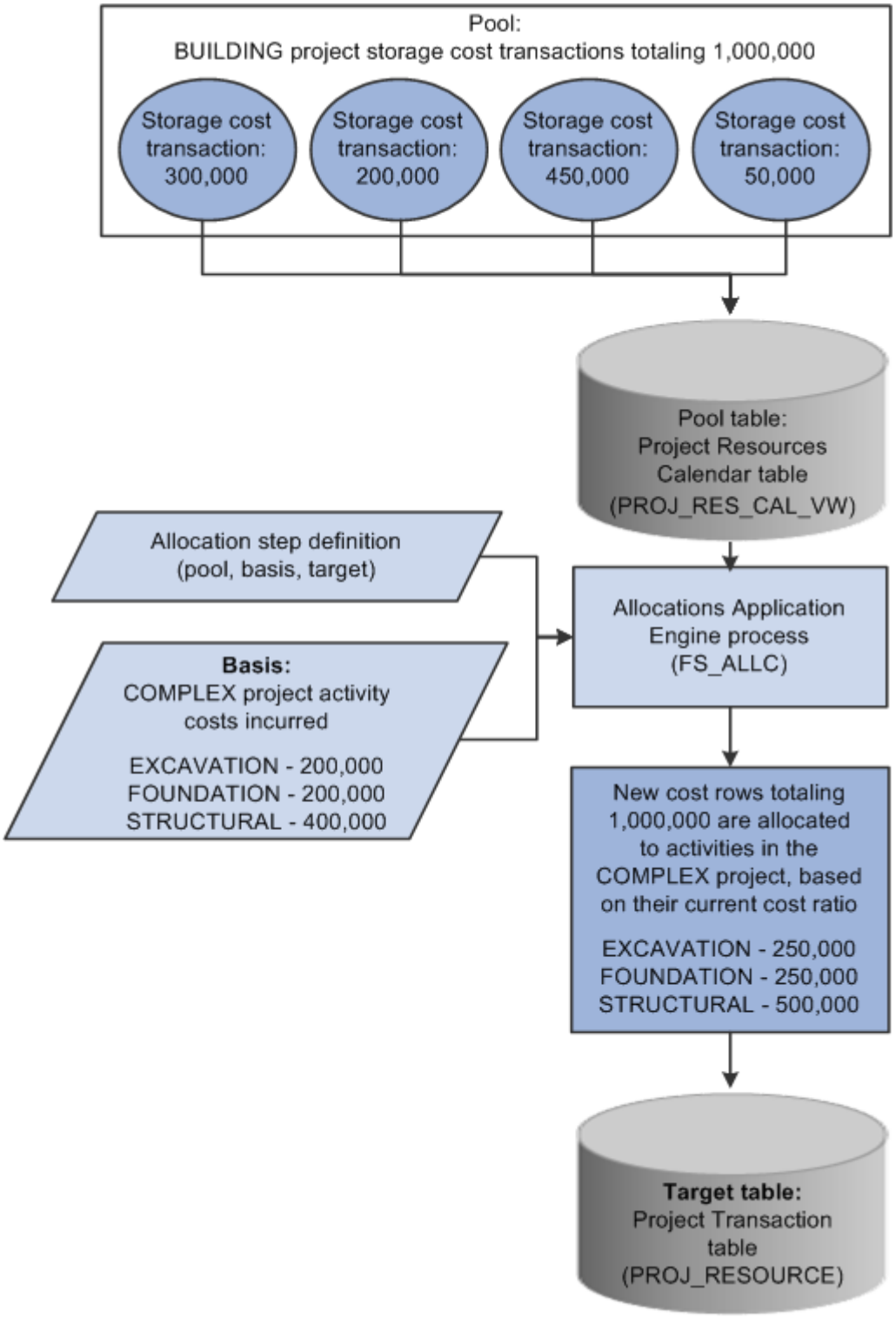

Define Allocation Step - Type Page

Use the Define Allocation Step - Type page (ALLOC_CALC_OPTN) to define the allocation type and any special arithmetic operations that you want to perform by using the pool and basis.

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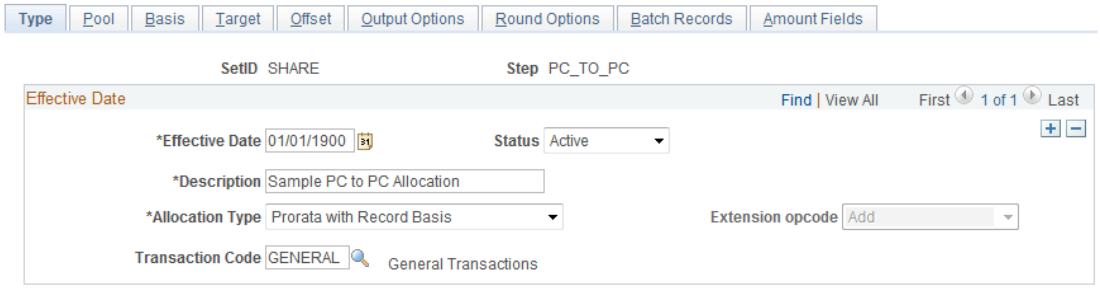
Select a transaction code for use in interunit and intraunit allocations.

Navigation:

Allocations, and then **Define and Perform Allocations**, and then **Define Allocation Step**, and then **Type**

This example illustrates the fields and controls on the Define Allocation Step - Type page. You can find definitions for the fields and controls later on this page.



The allocation type defines how the pool amount is distributed to the target.

Field or Control	Description
Allocation Type	To allocate the pool amount to the three activities using a ratio based on their current costs, the PC_TO_PC allocation step uses an allocation type of *Prorata with Record Basis.* This allocation type requires a basis definition, because it divides the pool amount among the targets based on amounts stored in the basis record.

Define Allocation Step - Pool Page

Use the Define Allocation Step - Pool page (ALLOC_POOL) to define the allocation pool record, selection criteria, and selection method.

Navigation:

Allocations, and then **Define and Perform Allocations**, and then **Define Allocation Step**, and then **Pool**

This example illustrates the fields and controls on the Define Allocation Step - Pool page. You can find definitions for the fields and controls later on this page.

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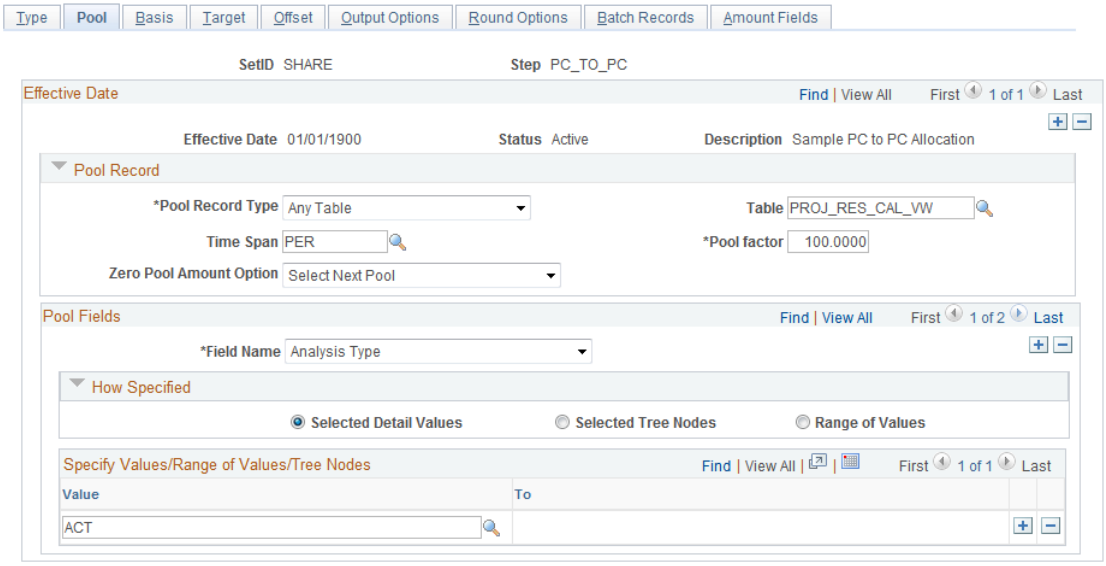

The allocation pool defines the amount to be allocated.

Field or Control	Description
Pool Record Type	Use *Any Table* as the record type for PeopleSoft Project Costing.
Table	For the PC_TO_PC allocation step, the system uses the accumulated source transactions for project *BUILDING* with analysis type *ACT* (actual cost) within the current fiscal period to distribute to the activities. Fiscal year and accounting period information must be available when the time span is the current period; therefore, the table that the system uses to retrieve the pool amount must contain the Fiscal Year field (FISCAL_YEAR) and Accounting Period field (ACCOUNTING_PERIOD). The PC_TO_PC allocation step uses the Project Resources Calendar table (PROJ_RES_CAL_VW) to retrieve the pool amount. The Project Resources Calendar table is a view of the Project Transaction table (PROJ_RESOURCE) table joined with the CALENDAR table. Click the **View All** link for the **Pool Fields** scroll area to see that the pool amount that is allocated to the activities, in this example, is based on the *BUILDING* project for the *ACT* analysis type.
Zero Pool Amount Option	*Select Next Pool* tells the system to skip a zero amount pool record and select the next pool record to process.
Time Span	The PC_TO_PC allocation step uses *PER* (current period transactions), indicating that the system only retrieves transactions that are in the current accounting period to calculate the pool amount.

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Add another row to the **Pool Fields** grid, enter field name *Project,* and enter the project ID *BUILDING* that contains the activity costs that you are accumulating.

Pool Fields

Field or Control	Description
Field Name	The first row identifies *Analysis Type* as a field that the PC_TO_PC allocation step uses to identify the pool. The second row identifies *Project* to further narrow the pool.
Value	Typically, the *ACT* analysis type is used as the analysis type for the pool record because it represents all actual costs that are accumulated in the Project Transaction table for the specified project activity. In the second row, *BUILDING* identifies the project that accumulates the transactions that you want to allocate.

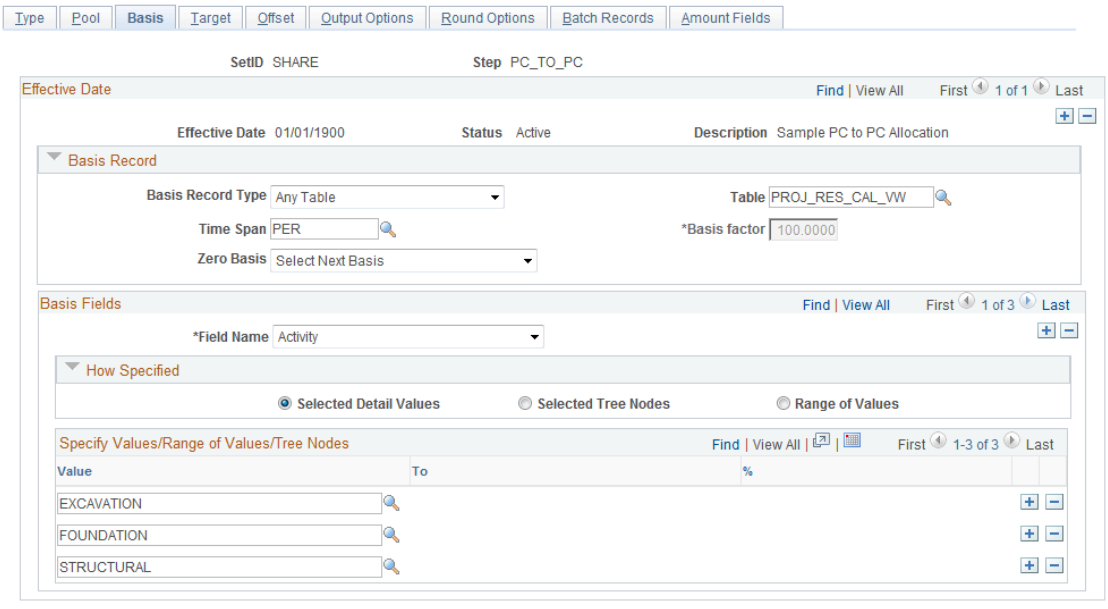
Define Allocation Step - Basis Page

Use the Define Allocation Step - Basis page (ALLOC_BASIS) to specify how and in what proportion the pool amounts are distributed to the various targets.

Navigation:

Allocations, and then **Define and Perform Allocations**, and then **Define Allocation Step**, and then **Basis**

This example illustrates the fields and controls on the Define Allocation Step - Basis page. You can find definitions for the fields and controls later on this page.



The basis defines how the pool is allocated across the target.

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Field or Control	Description
Table and **Time Span**	The PC_TO_PC allocation step uses the Project Resources Calendar table as the basis table, since the system uses only transactions within the current period (time span of *PER)* to determine the percentage allocation for each activity.

Basis Fields

To allocate the pool amount to the three activities using a ratio based on their current costs, the PC_TO_PC sample allocation step has a type of *Prorata with Record Basis,* which requires a basis definition. The system uses basis rows to determine how to split the pool amount among the target rows.

Field or Control	Description
Field Name and **Value**	Three rows appear in the Basis Fields grid, specifying that the system retrieves transactions for project *COMPLEX* and activities *EXCAVATION*, *FOUNDATION,* and *STRUCTURAL,* with an analysis type of *ACT.* The system calculates the current costs for each activity. Since the target project and activity are defined by the basis, the pool amount is split among the three activities of the project in the same proportion as their respective current cost.

Click the **View All** link for the **Basis Fields** scroll area to see that the basis of the allocation is the accumulated costs prior to the current allocation that is recorded in the *BUILDING* project for the *ACT* analysis type in the *EXCAVATION, FOUNDATION,* and *STRUCTURAL* activities.

Define Allocation Step - Target Page

Use the Define Allocation Step - Target page (ALLOC_TARGET) to define the destination for the allocation or target record and target field values.

Navigation:

Allocations, and then **Define and Perform Allocations**, and then **Define Allocation Step**, and then **Target**

This example illustrates the fields and controls on the Define Allocation Step - Target page. You can find definitions for the fields and controls later on this page.

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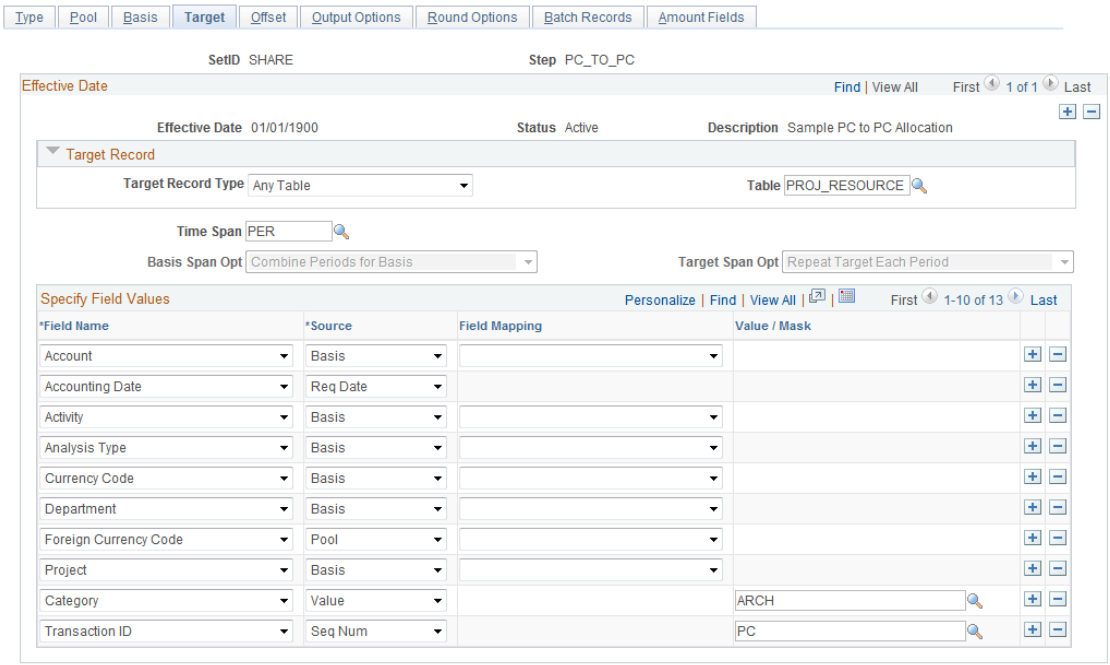

The allocation creates new rows in the Project Transaction table. You must specify field values for which you want specific values from the allocation process. You must also specify the field value source, such as pool, basis, fixed value, or sequence number.

Field or Control	Description
Table	The PC_TO_PC allocation step uses the Project Transaction table as the target record. **Note:** If you use the Project Transaction table as the target, you must also manually run any project-related processes on the allocation rows.

Specify Field Values

In the **Specify Field Values** grid, define the fields for which you want specific values and define the source (pool, basis, specific value, sequence number, and so forth) from where the values originate. Include keys fields and other fields that are mandatory for processing.

To distinguish new allocation rows from the original cost rows, enter field name *Analysis Type,* with a source of *Value,* and a value/mask that is a different analysis type than the original cost rows. To summarize transactions across dates, enter field name *Transaction Date* with a source of *Req Date* (request date). To summarize rows by individual date, enter field name *Transaction Date* with a source of *Pool.*

Important

To ensure uniqueness in the resulting table, specify the Transaction ID field (RESOURCE_ID) as a target field, and select *Seq Num* (sequence number) as the source.

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Each new row that the Allocations process adds to the target table contains values only for the fields that you list in the Target page. The values are based on the source location specified in the Source column.

The fields listed in the Target page not only specify the fields to copy to the new allocation rows in the target record, but also they implicitly specify the level at which you want to summarize allocation rows. If you specify fields to be populated from the basis or pool, the Allocations process summarizes the rows based on unique values of these fields. If you want the Allocations process to ignore a particular field and summarize all rows regardless of the field's value, you can either not specify the field in the Target page, or specify the field with a constant value. There are most likely many more fields in the target record than you will list in the Target page. The fields that are not listed in the Target page will not contain data in the new rows that the Allocations process creates.

An offset is not necessary in this example because the table output option is *Replace Existing Amounts.*

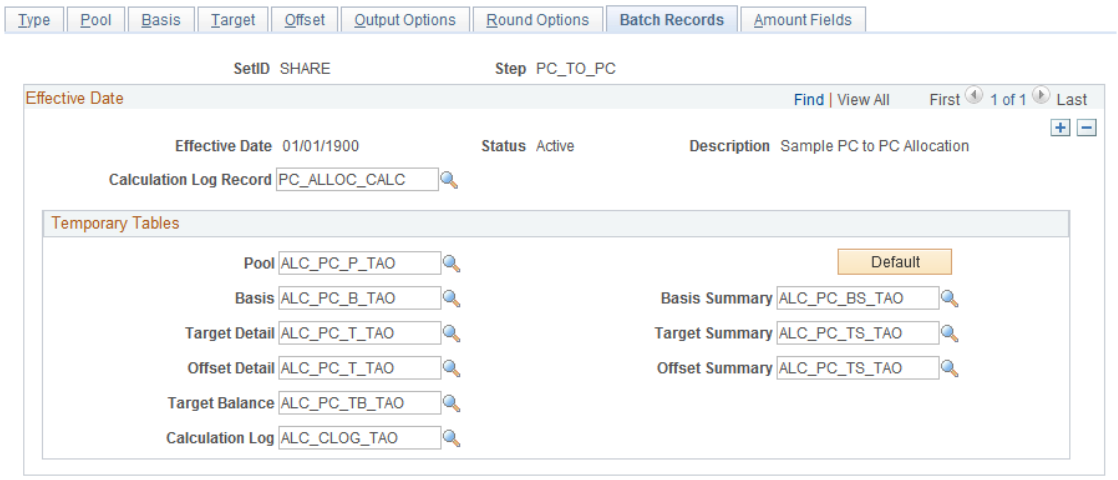
Define Allocation Step - Batch Records Page

Use the Define Allocation Step - Batch Records page (ALLOC_RECNAME) to specify the batch temporary tables that the Allocations process uses.

Navigation:

Allocations, and then **Define and Perform Allocations**, and then **Define Allocation Step**, and then **Batch Records**

This example illustrates the fields and controls on the Define Allocation Step - Batch Records page. You can find definitions for the fields and controls later on this page.



Batch records are temporary work records that store the calculations and log files for the Allocations process.

PeopleSoft delivers these temporary work records for use in both PeopleSoft General Ledger and PeopleSoft Project Costing allocations:

Temporary Work Record	Record Name
Calculation Log Record	PC_ALLOC_CALC

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Temporary Work Record	Record Name
Pool	ALC_PC_P_TAO
Basis	ALC_PC_B_TAO
Basis Summary	ALC_PC_BS_TAO
Target Detail	ALC_PC_T_TAO
Offset Detail	
Target Summary	ALC_PC_TS_TAO
Offset Summary	
Target Balance	ALC_PC_TB_TAO
Calculation Log	ALC_CLOG_TAO

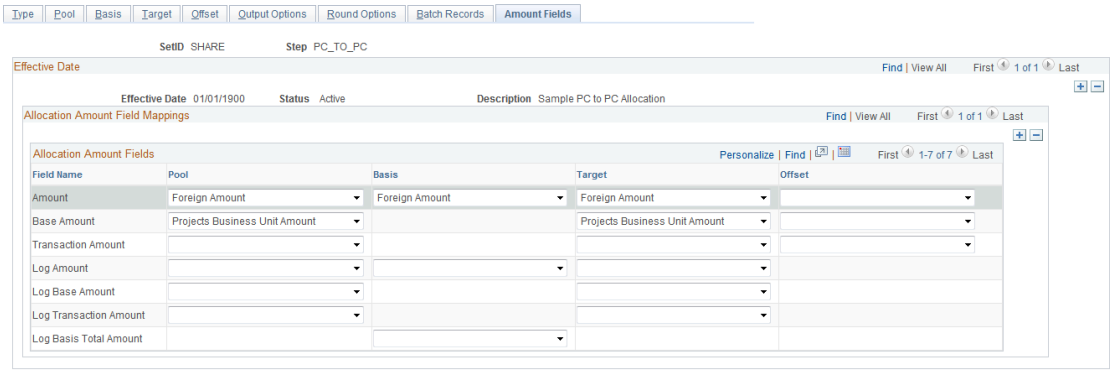
Define Allocation Step - Amount Fields Page

Use the Define Allocation Step - Amount Fields page (ALLOC_AMOUNT) to define the amount field mapping between the pool, basis, target, and offset records.

Navigation:

Allocations, and then **Define and Perform Allocations**, and then **Define Allocation Step**, and then **Amount Fields**

This example illustrates the fields and controls on the Define Allocation Step - Amount Fields page. You can find definitions for the fields and controls later on this page.



Amount fields define the fields that store pool, basis, target, and, if applicable, offset amounts. Use this page to define how to distribute the amounts from the fields in the pool record to the fields in the target and offset records.

Allocation Amount Fields

Specify the appropriate amount fields for both the foreign currency and base currency amounts. If you use the Project Resources Calendar table and Project Transaction table as the pool, basis, or target table, select *Foreign Amount* (FOREIGN_AMOUNT) for the **Amount** fields and *Projects Business Unit Amount* (RESOURCE_AMOUNT) for the **Base Amount** fields.

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Allocation Request Page

Use the Allocation Request page (ALLOC_REQUEST) to specify parameters and run the Project-to-Project Allocation process.

Navigation:

Allocations, and then **Define and Perform Allocations**, and then **Request Allocation**, and then **Allocation Request**

Use this page to run the sample PC_TO_PC allocation group that contains the PC_TO_PC allocation step. The system allocates the pool amount to the target record, based on the criteria in the basis fields.

Allocating Costs from General Ledger

You can use the Allocations process to distribute revenue, expense, and statistical quantities from accounts in PeopleSoft General Ledger to one or more projects in PeopleSoft Project Costing. In these situations, the allocation pool is derived from a ledger instead of from a PeopleSoft Project Costing table. Follow similar steps to set up allocations from general ledger accounts as you do to set up project-to-project allocations.

The Application Fundamentals: Understanding Oracle's PeopleSoft Allocations Process (FS_ALLC) concept provides a more detailed overview of allocation components, and discusses how to set up, copy, rename, and delete allocation steps, produce allocation reports, and recover allocation errors.

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23

Calculating Interest

Understanding Interest Calculations

This topic discusses:

- Interest calculation formula.
- Basic steps to set up and calculate interest.

Interest Calculation Formula

You calculate interest during construction—Allowance for Funds Used During Construction (AFUDC)—to capitalize the cost of company funds that are used over the course of a project. Interest is calculated based on this formula:

Interest During Construction = (Cost Accumulation*) × (Periodic Interest**)

*Accumulated costs based on a specified method of accumulation.

**Yearly interest rate divided by the number of periods in the fiscal year.

Basic Steps to Set Up and Calculate Interest

The basic steps to set up and calculate interest are:

1. (Optional) Define interest types at the SetID level.

   See Interest Types Page .
2. Establish period calculation factors at the SetID level.
3. Define interest calculations at the business unit level.
4. Identify projects and activities to include interest calculations.
5. Establish status-based interest calculation factors.
6. Accumulate transactions in the Project Transaction table (PROJ_RESOURCE).
7. Run the interest calculation process.

Establishing Period Calculation Factors

To establish period calculation factors, use the Period Calculation Factors component (PROJ_INT_DETP).

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Pages Used to Establish Period Calculation Factors

Page Name	Definition Name	Usage
Period Calculation Factor Page	PROJ_INT_CAL_DETP	Define period calculation factors for specified time periods.

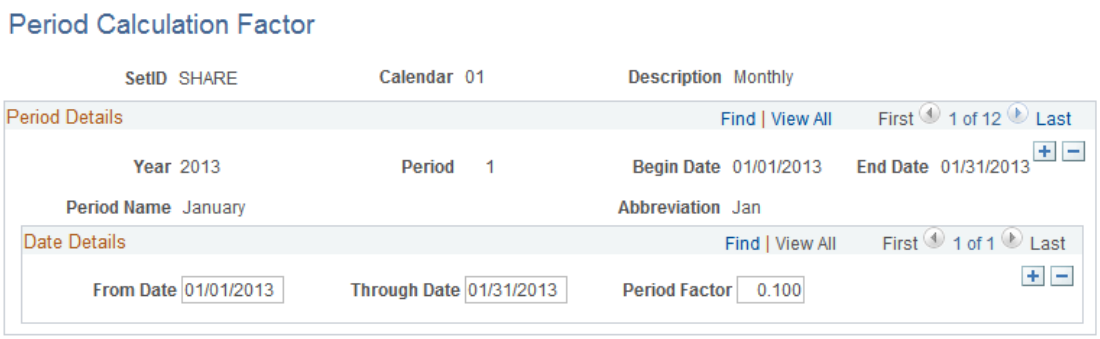
Period Calculation Factor Page

Use the Period Calculation Factor page (PROJ_INT_CAL_DETP) to define period calculation factors for specified time periods.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Period Calc Factors**

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



Period calculation factors are based on general ledger calendars. Select a period in the general ledger calendar and specify the dates for which you want to accumulate costs, and the factor by which you want those costs to be multiplied.

Field or Control	Description
From Date and **Through Date**	Enter the period of time that the system uses to calculate interest. Interest is calculated on costs that are incurred during the period that you specify. Add rows to enter additional date ranges.
Period Factor	Enter the percentage of costs that the system uses to calculate interest. Interest is calculated on the specified percentage of the costs incurred—usually 100 percent—during the specified date range. Use a decimal fraction to enter a percentage that is less than 100 percent. For example, enter *.5* for 50 percent.

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The next two sections provide examples of period calculation factors that are set up by using the straight average method and FASB 34 method of accumulating costs.

Example of Period Calculation Factor Straight Average Method

The Straight Average method uses this formula:

Costs = (Beginning Costs* + Ending Costs**) ÷ 2

*Total costs for the project up to the beginning of a period.

**Total costs for the project through the end of the same period.

For example:

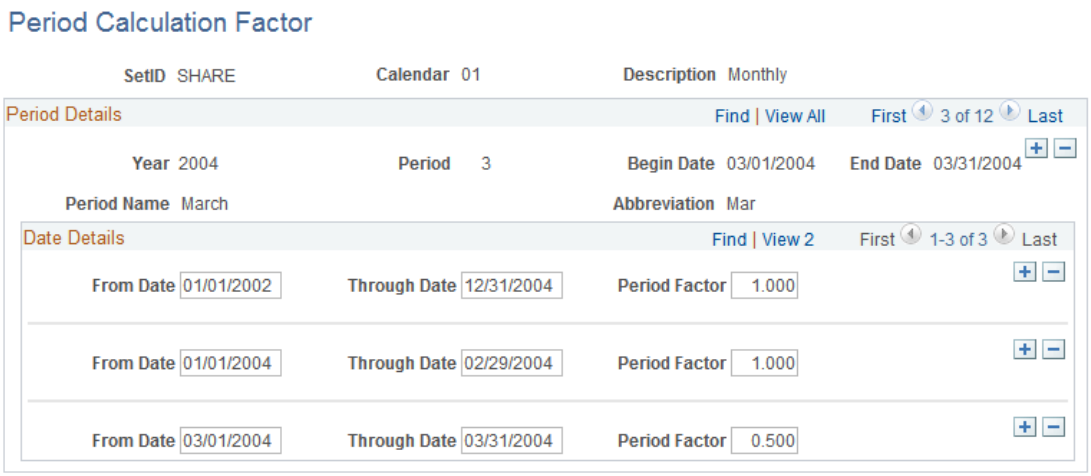
Variable	Value
Project Length	4 years (2002–2005)
Current Date Range	1/1/2004 – 12/31/2004
Calendar Type	Months
Current Date	4/6/2004
Spending Prior to Current Fiscal Year	1,000,000 USD
Spending for Current Year	• January: 12,000 USD • February: 15,500 USD • March: 13,400 USD

Using the Straight Average method, the project cost accumulation calculations for March, 2004 are:

(1,027,500 + 1,040,900) ÷ 2 = 1,034,200

The following page illustrates period calculation factors that are set up for the Straight Average example just discussed. The last period, March, is assigned a value of *0.5* (50 percent) to reflect the assumption that half of the costs were incurred in the first half of the month, and the other half were incurred in the last half of the month.

This example illustrates the fields and controls on the Example of the Period Calculation Factor page with Straight Average method. You can find definitions for the fields and controls later on this page.



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FASB 34 Method

The FASB 34 method calculates a weighted average of costs using the following formula:

Cost Accumulation = (Prior Costs*) × (Weighted Current Year Costs**)

*Project-to-date costs prior to the current date range.

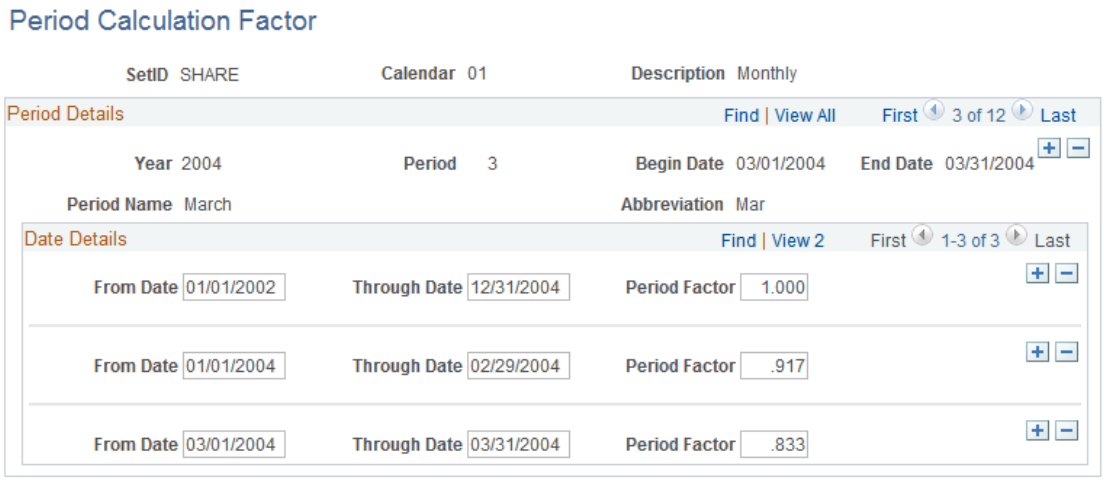
**Sum of the weighted average costs for each completed period in the current date range.

Using the FASB 34 method, the project cost accumulation calculations for March 2005 (using the example above) are:

((1,000,000 + 12,000 × 12 ÷ 12) + (15,500 × 11 ÷ 12) + (13,400 × 10 ÷ 12)) = 1,037,375

The following page illustrates period calculation factors that are set up for the FASB 34 example just discussed:

This example illustrates the fields and controls on the Example of the Period Calculation Factor page with FASB 34 method. You can find definitions for the fields and controls later on this page.



Setting Up and Processing Interest Calculations

Pages Used to Set Up and Process Interest Calculations

Page Name	Definition Name	Usage
Interest Calculation Page	PROJ_BU_INTEREST	Define interest calculations for the business unit.
Project Costing Definition Page	PROJECT_GEN_01	Select the option to include project costs in interest calculations, which is used as the default for all new activities that are created for this project.

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Page Name	Definition Name	Usage
Project Definitions - Status Page	PROJECT_STATUS	Specify interest calculation factors based on a project's status.
Activity Definitions - Definition Page	PROJECT_ACTIVITY	Select **Allow Interest Calculation** to include activity costs in interest calculations.
Calculate Interest Page	PC_INTEREST	Calculate interest and insert new rows into the Project Transaction table based on selected criteria.

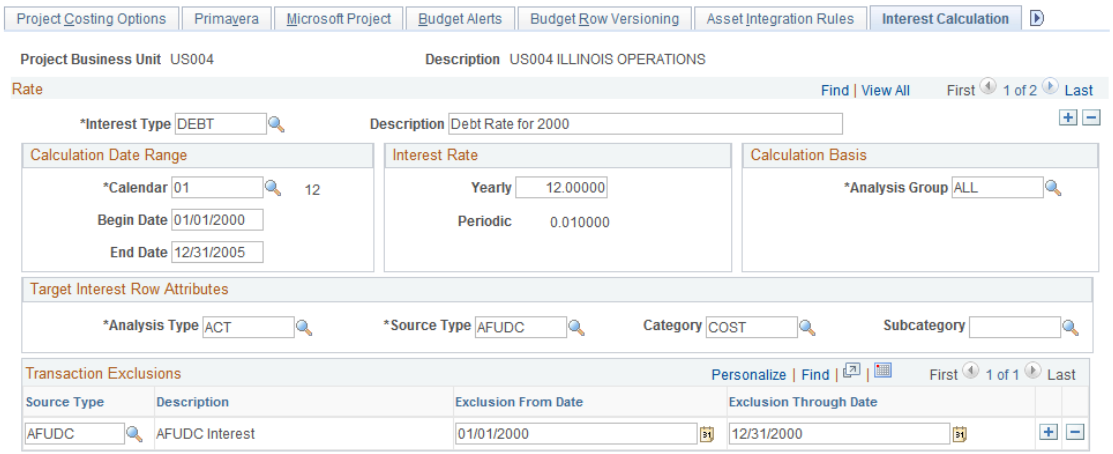
Interest Calculation Page

Use the Interest Calculation page (PROJ_BU_INTEREST) to define interest calculations for the business unit.

Navigation:

Setup Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Project Costing Options**, and then **Interest Calculation**

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



Field or Control	Description
Interest Type	Defines the type of interest calculated for a project in the business unit. You can enter more than one kind of interest to be calculated, such as debt and equity interest.
Calendar	Select the period calculation factors that are set up for the general ledger.

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Field or Control	Description
Interest Rate	Enter the yearly interest rate. The system calculates the periodic interest rate based on the yearly interest rate ÷ number of calendar periods.
Analysis Group	Enter the analysis group that contains the analysis types that are used as the basis for interest calculation. The analysis group typically includes all costs.
Target Interest Row Attributes	Enter the analysis type, source type, category, and subcategory as the attributes to identify new rows that are generated by interest calculations.

> **Important**
>
> The system performs compound interest calculations on all source types, except the ones that you enter in the **Transaction Exclusions** group box. You can exclude any source types from the cost accumulation. For example, if you are not allowed to include previous interest in calculating future interest, you can exclude previous interest from the cost accumulation

Transaction Exclusions

Field or Control	Description
Source Type	Select the source types to exclude from cost accumulation. Enter multiple source types as required.
Exclusion From Date and **Exclusion Through Date**	Enter a date range for each excluded source type. This date range identifies the period of time for which a source type is excluded.

Identifying Projects for Interest Calculations

To include project costs in interest calculations, select **Allow Interest Calculation** on theProject Definitions - Project Costing Definition Page

If you include costs at the project level:

- The system automatically includes costs that are incurred by all activities belonging to that project for interest calculations.

  Only those projects with a processing status of *Active* are eligible for interest calculation. After the PC Interest Application Engine process (PC_INTEREST) selects those projects with an active processing status, only those activities with a processing status of *Active* are eligible for interest calculation.
- The **Allow Interest Calculation** option is selected by default on all subsequent activities created for this project

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Project Definitions - Status Page

Use the Project Definitions - Status page (PROJECT_STATUS) to specify interest calculation factors based on a project's status.

Navigation:

Project Costing, and then **Project Definitions**, and then **Status**, and then **Status**

Use this page to define interest calculation factors for a specific project based on the project's status. For example, you can configure the system to recognize 100 percent of the calculated interest for a project in *Open* status, and 50 percent of the calculated interest for the project in an *In Service* status.

To define interest calculation factors that are based on status, enter an interest calculation factor for a status on the Project Definitions - Status page. Enter the value in decimal form, such as *1.0* for 100 percent, with a maximum of one digit on either side of the decimal point.

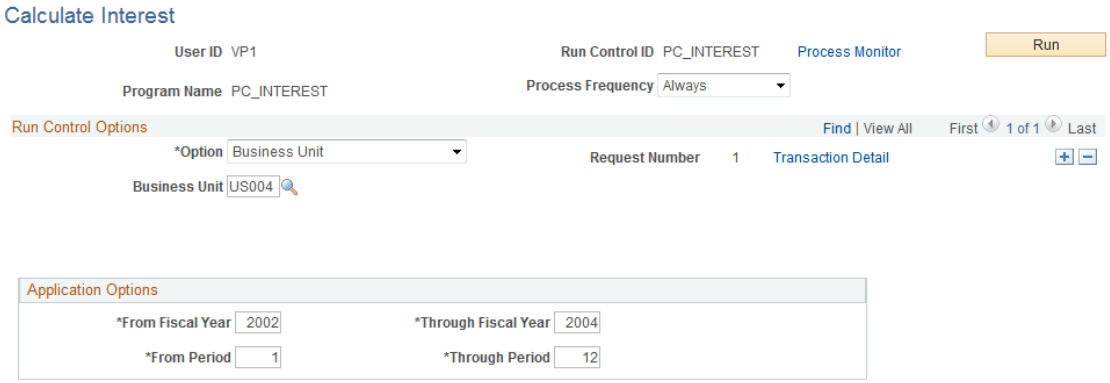
Calculate Interest Page

Use the Calculate Interest page (PC_INTEREST) to calculate interest and insert new rows into the Project Transaction table based on selected criteria.

Navigation:

Project Costing, and then **Utilities**, and then **Calculate Interest**, and then **Calculate Interest**

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



The data in this run control page shows the final step to calculate interest for the examples in the Defining Period Calculation Factors section in this topic.

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Field or Control	Description
Option	Select to calculate interest for all projects and activities, or for specific ones. Options are: • *All:* Interest is calculated for all projects and activities. • *Business Unit:* Interest is calculated for the selected business unit. • *Business Unit/Project:* Interest is calculated for the selected business unit and project. • *Business Unit/Project/Activity:* Interest is calculated for the selected business unit, project, and activity.
Application Options	Enter the beginning and ending fiscal year dates, and the beginning and ending period, for which you want to calculate interest.

Click **Run** to initiate the PC Interest Application Engine process. The system adds a row for the calculated interest to the Project Transaction table with a General Ledger Posting Status flag (GL_DISTRIB_STATUS) value of *N* (not yet posted).

See the product documentation for *PeopleTools: Process Scheduler*

Related Topics

- Understanding Integration with PeopleSoft General Ledger
  PeopleSoft Project Costing has a built-in integration with PeopleSoft General Ledger by way of the Journal Generator Application Engine process (FS_JGEN). The Journal Generator process transforms accounting entries into journal entries that you can post to PeopleSoft General Ledger.
- Understanding Data Flows
  Most information that is stored in PeopleSoft Project Costing originates from feeder systems such as other PeopleSoft applications and third-party applications. Feeder system data is posted to PeopleSoft General Ledger and passed to PeopleSoft Project Costing through Application Engine processes.
- Processing Single-Sided Transactions
- Understanding Interest Calculations
  This topic discusses:

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Analyzing Projects

Understanding Project Evaluation

This topic provides overviews of:

- Project valuation.
- Flexible analysis.
- Transactions in progress.
- Projects Reconciliation Workbench
- Analysis inquiries.
- Accumulated costs.
- Refresh summary tables.
- Percent complete.
- Project profitability analysis.

Project Valuation

You can set up templates that contain evaluation criteria for project and activity summary information. The templates can be used by anyone with security access to the Project Valuation component (PC_VALN_ANALYTICS). To perform the evaluation, you select a business unit, project, and template that the system uses to calculate a summary view of different project dimensions, and an activity-based view of financial data.

Project-level summary data is set up with these criteria:

- Transaction group criteria: Transaction rows with the same analysis group, source type, category, and subcategory.

  Transaction group summary values appear on the Project Valuation page, and can be used in formulas to calculate financial status.

- Reporting calculations: Formulas using up to three transaction groups and operators (+, −, *, and /).

  You can create arithmetic equations using parentheses to calculate statistics such as the actual percent of budget. Reporting calculation results appear below the transaction group summary rows on the Project Valuation page.

- Analysis groups: Groups that are used to summarize the project ChartField rows that appear in the **Project Overview** grid on the Project Valuation page.

- Project ChartField criteria: Summary rows with the same combination of source type, category, and subcategory.

  The system summarizes project-related ChartField rows by user-specified analysis groups.

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Flexible Analysis

Flexible Analysis is a method of analyzing a project's costs at these levels:

- Project
- Summary activity
- Activity
- Source type
- Category
- Subcategory

The Flexible Analysis page provides a view of activity costs based on the analysis groups that are specified in a flexible analysis template. Flexible Analysis is an interactive tool that works effectively if you want to view one data item at a time, such as costs by source type or category. The feature does not provide an overall financial analytic of the project.

You must create a template before you can perform flexible analysis. Templates specify the analysis types that the system uses to gather project costs. You can save a template as a user default to save time performing flexible analyses. You can modify flexible analysis templates as required.

Transactions in Progress

Projects are made of transactions that are in various stages of the project cycle. Transactions in progress (TIPs) are tracked so that you can see project cost information before it reaches the Project Transaction table (PROJ_RESOURCE). Project managers can identify potential problem areas and see where each part of the project stands in the overall process. TIP information focuses attention on what needs to be resolved to ensure that the project is running smoothly and is not delayed because of a particular problem.

Each PeopleSoft feeder system that has costs associated with a project sends TIP data to PeopleSoft Project Costing by running an Application Engine process that is specific to that feeder system. TIP pages display fields that are associated with PeopleSoft Project Costing, and key fields that are retrieved from primary feeder tables and pooled during the Application Engine process.

This table lists the types of TIPs that PeopleSoft Project Costing delivers:

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
All	ALLTOPC	All transactions that have been transmitted to PeopleSoft Project Costing and are either nonbillable or haven't been priced. Transactions are retrieved from the Project Transactions Summary table (PC_SUMMARY_TBL), where the Billing Distribution Status field (BI_DISTRIB_STATUS) equals *U* or *N*.	Online query
PeopleSoft Expenses	EXTOPC	PeopleSoft Expenses that are approved but not transmitted (staged) for processing in PeopleSoft Project Costing. Transactions are retrieved from the Expenses Accounting Line table (EX_ACCTG_LINE).	EX_TIP_LOAD
PeopleSoft Expenses	TMTOPC	Time that is approved and staged for processing in PeopleSoft Project Costing. Transactions are retrieved from the Time Staging for Project Resource table (EX_PROJ_RES_STG).	EX_TIP_LOAD
PeopleSoft Inventory	INTOPC	PeopleSoft Inventory costs that are not transmitted to PeopleSoft Project Costing. Transactions are retrieved from the PeopleSoft Inventory Accounting Distribution table (CM_ACCTG_LINE) and the PeopleSoft Inventory Transaction table (TRANSACTION_INV).	PC_PETIP_SUM

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
PeopleSoft Payables	APTOPC	PeopleSoft Payables expenses that are recorded and not transmitted to PeopleSoft Project Costing. Transactions are retrieved from the PeopleSoft Payables Accounting Entries table (VCHR_ACCTG_LINE) and the PeopleSoft Payables Voucher Header table (VOUCHER).	PC_PETIP_SUM
PeopleSoft Payables PeopleSoft Contracts (optional) PeopleSoft Grants (optional)	APNOPY	Unpaid vouchers that have been distributed to PeopleSoft Project Costing. The GM_METHOD_PAYMENT selection parameter is available only when PeopleSoft Contracts is installed. Otherwise, the query shows all unpaid and partially paid vouchers. Transactions are retrieved from the PeopleSoft Payables Accounting Entries table (VCHR_ACCTG_LINE) and the PeopleSoft Payables Voucher Header table (VOUCHER).	PC_PETIP_SUM* *This Application Engine also loads Contracts Administration (CA) data when Contracts is installed.

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
PeopleSoft Contracts PeopleSoft Grants (optional)	CANOPC	PeopleSoft Project Costing projects or activities not assigned to a contract line. If you select the Show Project Activities check box (PROJECT_ID_FLG), which appears on the Feeder System Options group of the Transactions in Progress page (Project Costing, Interactive Reports), when you click the Search button, the system will display all of the project activities that are not assigned to a contract line. If you do not select the Show Project Activities check box on the Transactions in Progress page and click the Search button, the system will only display projects that are not assigned to a contract line and will not display their associated activities.	PC_PETIP_SUM
PeopleSoft General Ledger	GLTOPC	Posted Journal transactions that are not transmitted to PeopleSoft Project Costing. This exception condition lists transactions for which the PeopleSoft General Ledger and PeopleSoft Project Costing amounts do not match. Users must review and resolve these issues to enable PROJ_RESOURCE to reconcile with the source system transactions prior to closing the period and prior to closing a project.	PC_PETIP_SUM

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
PeopleSoft Purchasing	POTOPC	Purchase order costs that are not yet distributed to PeopleSoft Project Costing. Transactions are retrieved from the Purchase Order Line Accounting Entries table (PO_LINE_DISTRIB) and the Purchase Order Header table (PO_HDR).	PC_PETIP_SUM
PeopleSoft Purchasing	REQTOPC	PeopleSoft Purchasing Requisitions that are not distributed to PeopleSoft Project Costing. This exception condition lists requisitions for a project that have not been interfaced to PROJ_RESOURCE for timing reasons or because the PC_PO_to_PC has terminated or ended because of an error. Users must review and resolve these issues to enable PROJ_RESOURCE to reconcile with source system transactions.	PC_PETIP_SUM
PeopleSoft Purchasing	UNSREQ	PeopleSoft Purchasing unsourced requisitions. You must identify and close all unsourced requisitions associated with a project prior to the project being closed. This exception condition lists unsourced requisitions for a project and is run as part of the closeout process. It is included in the closeout reports of some organizations.	PC_PETIP_SUM
PeopleSoft Billing	BITOPC	PeopleSoft Billing invoiced billing lines that are not distributed to PeopleSoft Project Costing.	PC_PETIP_SUM

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
PeopleSoft Receivables	ARTOPC	PeopleSoft Receivables expenses that are recorded and not transmitted to PeopleSoft Project Costing.	PC_PETIP_SUM

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
PeopleSoft Project Costing	BDTOPC	Budgets in progress Unposted project budgets: When a new project budget is added to the Project Budgets pages, you must finalize it before spending can begin. You can review project budget details in the Project Budgets and Project Budget Inquiry pages. You must review every project to identify those project budgets that have not been finalized. This exception condition is usually run as part of the project setup validation process, and is run on a weekly or monthly basis. BD_HDR_STATUS <> 'P' Posted project budgets not distributed to Commitment Control: When a new project budget is added to the Project Budget pages, you must finalize it, which posts it to PeopleSoft Commitment Control. You can review project budgets posted to PeopleSoft Commitment Control in the Project Budgets page. You must review every project to identify any project budgets that were not posted to PeopleSoft Commitment Control. Issues with the Projects to Commitment Control Application Engine process (PC_WRAPPER) can prevent the posting of finalized budgets to PeopleSoft Commitment Control. No delivered exception inquiry page or report	PC_PETIP_SUM

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
		displays all budgets that meet this exception condition. This exception condition is usually run as part of the project setup validation process, and is run on a weekly, monthly, or ad hoc basis. A.KK_DISTRIB_STATUS <> 'D'	
		Posted project budgets that are not distributed to projects (PROJ_RESOURCE):	
		When a new project budget is added to the Project Budget pages, you must finalize it, which posts it to PROJ_RESOURCE. You can review project budgets posted to PROJ_RESOURCE on the Project Budgets and Project Budget Inquiry pages. You must review every project to identify those project budgets that have not been posted to PROJ_RESOURCE. Issues with the Projects Interface Edit process (PC_INTFEDIT) can result in the finalized budgets not being posted to PROJ_RESOURCE. No delivered exception inquiry page or report displays project budgets that have not been posted to PROJ_RESOURCE. This exception condition is usually run as part of the project setup validation process, and is run on a weekly or monthly basis. PC_DISTRIB_STATUS <> 'D'	

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PeopleSoft Enterprise Feeder System	Transactions in Progress	Description	Application Engine
PeopleSoft Grants	FATOPC	PeopleSoft Grants F & A transactions in progress This exception condition lists all transactions that are eligible for F&A (Facilities and Administrative) costs that have not been calculated. This could be caused by timing issues, such as the GM_GMFACS process terminating or ending in error in the nightly batch process. You must ensure that F & A is calculated on all eligible transactions for the system to bill it to the sponsor to maximize the organization's cash flow. FA Error Interactive Report: If the GM_GMFACS process terminates or ends in error, you can access the FA Error Interactive Report (GM_FA_INQ) page from the **Facilities and Administrative Inquiry** group box.	PC_PETIP_SUM

Using the Transactions in Progress Summary (PC_PETIP_SUM) Application Engine Batch Process

The Transaction in Progress Summary (PC_PETIP_SUM) application engine evaluates the line records of PeopleSoft products with which PeopleSoft Project Costing integrates, such as PeopleSoft Purchasing, Payables, Inventory, Expenses, and so on, and refreshes the transaction data into PeopleSoft Project Costing transaction summary tables. Transactions in Progress pages use this data to display the transaction status. You can schedule this process to run automatically as often as needed based on your business processes.

When querying large tables, the Transactions in Progress Summary (PC_PETIP_SUM) application engine enables you to run a batch process to load the transaction in progress data coming from the feeder systems (AP, GL, AR, INV, PO, BI, GM). Running this process decreases the amount of time required to load the transactions in progress from the feeder systems to the TIP staging tables and display them in the PeopleSoft Project Costing Transaction in Progress page .

The PC_PETIP_SUM (Transactions in Progress Summary) application engine loads feeder system transactions using the online transaction in progress criteria. After the Transactions in

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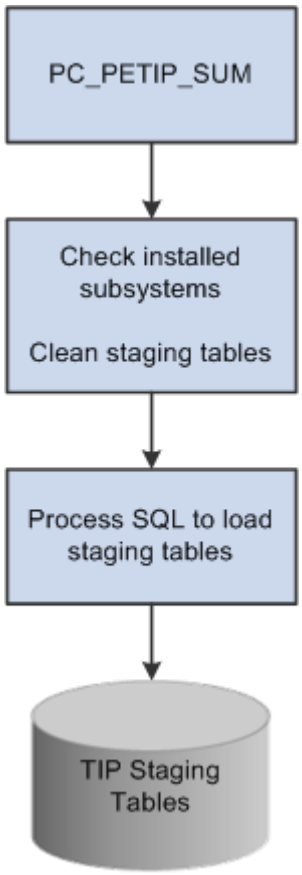
Progress Summary application engine runs, the staging tables are populated, which enables you to search for and display the transactions in progress on the Transactions in Progress page in PeopleSoft Project Costing. You can load the transactions for one or all feeder systems on the Run Control page.

This diagram shows the Transactions in Progress Summary batch process flow.



> **Note**
>
> The PeopleSoft Expenses Transaction in Progress Loader application engine (EX_TIP_LOAD) enables you to run a batch process to load a large amount of PeopleSoft Expenses transaction in progress data from PeopleSoft Expenses. See PeopleSoft Financials, ESA, ALM, and SCM Portal Packs: Understanding Transactions in Progress

Projects Reconciliation Workbench

The Projects Reconciliation Workbench enables project managers to review all of the transactions in progress for a single project. You must run the Transaction in Process Summary (PC_PETIP_SUM) process (Project Costing, Utilities, Transaction in Process Summary) to load the TIP (Transactions in Progress) tables before you create or review a reconciliation ID. You create various reconciliation scenarios such as Project Closeout or End of Month Review by assigning each one a reconciliation ID and associating it with a business

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unit and a project ID. After setting up this information, you select specific criteria and search for transactions in progress associated with:

- PeopleSoft Project Costing

  You can specify a project activity and an analysis type, which apply to all of the subsystem transactions, or leave these fields blank and the system displays all transactions for all activities and analysis types. You can display Project Costing transactions in progress that have not been costed or priced (ALLTOPC), as well as unbilled transactions during a period of time that the project was inactive (INACTPC).

- PeopleSoft Billing

  You can search for and display PeopleSoft Billing transactions in progress (BITOPC) for the project in a grid on the Billing page.

- PeopleSoft Commitment Control

  You can search for and display unposted project budgets, budgets not distributed to PeopleSoft Commitment Control, or budgets not distributed to PeopleSoft Project Costing (BDTOPC) for the project in a grid on the Budgets page.

- PeopleSoft Contracts

  You can search for and display project activities that are not assigned with a contract line for a project that is sourced from PeopleSoft Grants, PeopleSoft Project Costing, or both (CANOPC) for the project in the grid on the Contracts page.

- PeopleSoft Expenses

  You can search for and display PeopleSoft Expenses transactions in progress (EXTOPC) and approved time transactions in progress (TMTOPC) for the project in the grid on the Expenses page.

- PeopleSoft Grants F & A

  You can search for and display PeopleSoft Grants F & A (Facilities and Administration) transactions in progress (FATOPC) for the project in the grid on the Grants F & A page.

- PeopleSoft General Ledger

  You can search for and display any PeopleSoft General Ledger journal transactions in progress (GLTOPC) for the project in the grid on the General Ledger page.

- PeopleSoft Inventory

  You can search for and display any PeopleSoft Inventory transactions in progress (INTOPC) for the project in the grid on the Inventory page.

- PeopleSoft Purchasing

  You can search for purchase orders (POTOPC) and requisitions (REQTOPC) in progress, as well as unsourced purchase orders (UNSPO) and requisitions (UNSREQ) that are closed, mass liquidated, open, unavailable for sourcing, and canceled, and that are associated with the selected project. You display this information in the four grids on the Purchasing page.

- PeopleSoft Payables

  You can search for PeopleSoft Payables transactions in progress (APTOPC) and unpaid vouchers that have been distributed to Project Costing (APNOPY), associate them with a method of payment based on the contract associated with the selected project, and display this information in the grids on the Payables page.

- PeopleSoft Receivables

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You can search for and display PeopleSoft Receivables transactions in progress (ARTOPC) for the project in the grid on the Receivables page.

The subsystem tabs that appear depend upon your system's setup. Once you select the search criteria on each page and display the transactions in progress based on this criteria, you save the page. Once you save the page, you can exit the workbench and return to this data later by selecting the same reconciliation ID. If you want to display different data for this reconciliation ID, you click a **Reset** button, which clears the original search criteria. After you enter the new criteria and search for the transactions, you can save the page again to retain the results. You can also drill down to the source transaction for each transaction listed in each grid.

Analysis Inquiries

By using analysis inquiries, you can view inquiry pages that display:

- A financial summary of a project.
- Employee costs by project.
- Employee costs by activity.

Accumulated Costs

By analyzing projects using accumulated costs, you can view project transactions based on:

- Assets
- Budget exceptions
- Time and labor
- Inventory
- Invoices
- Journal entries
- Orders
- Purchase orders
- Vouchers

Refresh Summary Tables

The PeopleSoft system delivers these summary tables that are used internally by PeopleSoft Project Costing and PeopleSoft Program Management for analytical reporting:

- Project Transactions Summary (PC_ACTIVITY_SUM).

  This table is used by flexible analysis reporting.

- Project Transactions Summary (PC_SUMMARY_TBL).

  This table is used by PeopleSoft Project Costing and PeopleSoft Program Management analytics, including estimate to complete, earned value, forecasting, and project valuation.

- Summary Budget Data (PC_BUD_SUMMARY).

  This table is used by budget versus actual, budget item analysis, and percent complete analyses.

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All transactions that enter the Project Transaction table—whether from feeder systems, direct entry through the Add Transactions component (INTFC_PROJ_EXPRESS), or through the Load Third-Party Transactions Application Engine process (PC_INTFEDIT)—trigger the Refresh Summary Tables Application Engine process (PC_SUM_RFSH) to populate all necessary summary tables.

Percent Complete

To determine the progress of a project and to assess progress at different levels of the project cycle, PeopleSoft Project Costing delivers tracking methods that are designed to provide information based on a project's percentage of completion.

Project managers can manually report the percent completion of their projects and activities, or the percentage of completion is calculated based on user parameters. Automatically calculated percentages are based on time that is spent on the project and are summarized at the project and activity levels.

If you use PeopleSoft Program Management, you can access the Percent Complete History page and view a chart of the percent complete progression over time for projects and activities.

Related Topics

- PeopleSoft Program Management: Percent Complete History Page

Project Profitability Analysis

PeopleSoft Project Costing enables you to analyze profit margins for individual projects. You can view actual profitability trends, profitability details, and the top 10 profitable projects.

Actual profitability trends are displayed in a graph format and in a grid. You enter two periods to compare and analyze values such as the actual revenue amount, the actual cost amount, the actual margin, and the actual margin percent for the period.

Profitability details include revenue, cost, budget, margin, and margin percent at the project level, and you can drill down to details at the activity level.

The top 10 profitable projects are displayed in a graph format and in a grid. You can display the 10 projects with the highest actual margin percent in descending order.

You need to understand these terms when analyzing profit margins:

Term	Definition
Profit Margin	Also referred to as profit, margin, or net income. Profit margin is a measure of profitability. It is calculated as revenue – cost. Profit margin is primarily used for internal comparison. Business entities typically have different levels of expenditure due to individual operating and financing arrangement. Therefore, comparing one with another can have little meaning.
Margin	This is the same as profit margin.
Margin Percent	This is the ratio between profit margin and revenue. It is displayed as a percentage. Margin percent is an indicator of an organization's pricing policies and its ability to control costs.

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Setting Up and Using Project Valuation

To set up project valuation, use the Project Valuation Template component (PC_VALN_TEMPLATE).

Pages Used to Set Up and Use Project Valuation

Page Name	Definition Name	Usage
Valuation Template Page	PC_VALN_TEMPLATE	Set up project valuation templates for business units.
Project Valuation Page	PC_PRJ_ANALYTICS	Evaluate project summary-level information. View project-level summaries based on user-specified criteria for transaction groupings and project overview information.
Activity Valuation Page	PC_ACT_ANALYTICS	View a breakdown by activity of the transaction group criteria from the project valuation template.

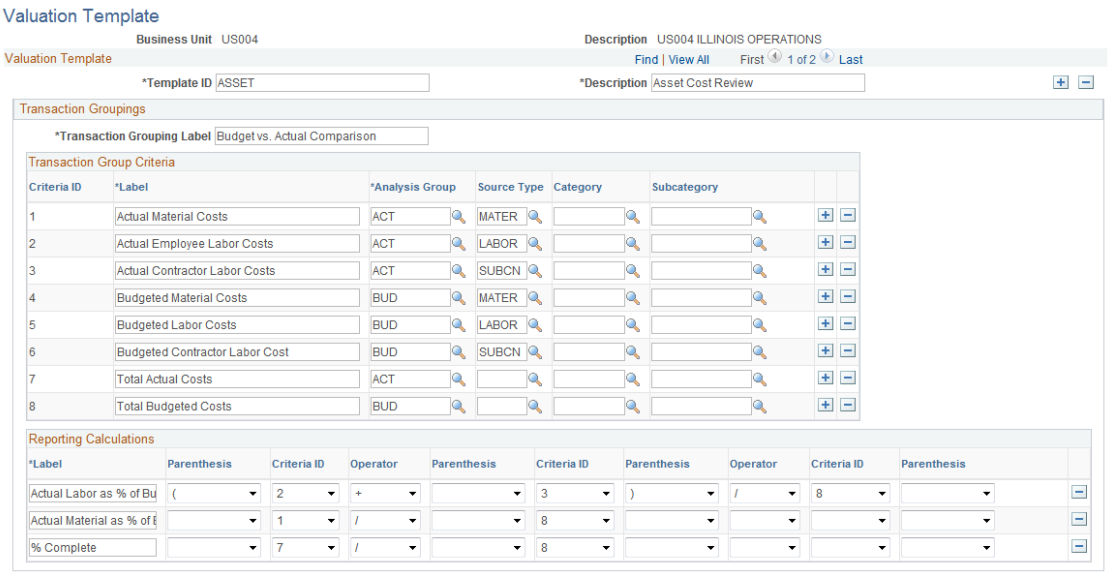
Valuation Template Page

Use the Valuation Template page (PC_VALN_TEMPLATE) to set up project valuation templates for business units.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Valuation Template**, and then **Valuation Template**

This example illustrates the fields and controls on the Valuation Template page (1 of 2). You can find definitions for the fields and controls later on this page.



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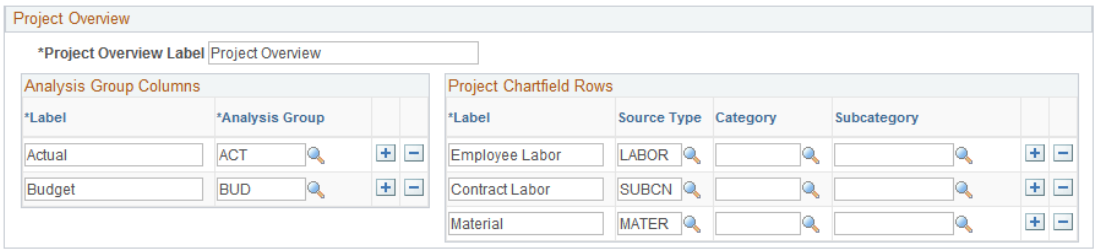
This example illustrates the fields and controls on the Valuation Template page (2 of 2). You can find definitions for the fields and controls later on this page.



This page contains all of the valuation templates for the business unit. Use the links and icons in the scroll area navigation bar to scroll through the templates or view all templates. Click the plus symbol (+) in the scroll area to add a new template, and click the minus symbol (-) to delete a template.

Field or Control	Description
Template ID	Enter a unique ID for the valuation template.
Description	Enter a description that will help users identify this template.

Transaction Group Criteria

Enter up to ten transaction group criteria rows that the system summarizes for specific projects and displays on the Project Valuation page.

Field or Control	Description
Transaction Grouping Label	Enter a label that describes the transaction groups that you set up on this page, such as *Budget vs. Actual Comparisons.* The label appears as the transaction group box label on the Project Valuation page for specific projects.
Criteria ID	Displays the order in which transaction summary rows appear on the Project Valuation page. **Note:** You cannot rearrange the sequence of criteria IDs to change the order of rows that appear on the Project Valuation page. To change the order of transaction summary rows, create a new template and enter the rows in the order that you want them to appear when you view the summary data on the Project Valuation page.
Label	Enter a label that describes the unique combination of analysis group, source type, category, and subcategory values in the corresponding transaction group row. Each label appears as a transaction summary row label on the Project Valuation page.
Analysis Group, **Source Type**, **Category,** and **Subcategory**	Enter a value in one or more fields for the system to use as the basis for summarizing transactions on the Project Valuation page.

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Reporting Calculations

Enter up to three formulas that the system uses to calculate results and display them on the Project Valuation page for a specific project. To define the formulas, you can add, subtract, multiply, or divide the transaction summaries that you set up in the **Transaction Group Criteria** grid. For example, you can calculate a budget percent variance amount as (budgeted cost amount − actual cost amount / budgeted cost amount).

If a formula contains a division, the system multiplies the results by 100 and displays the results in a percentage format. For example, if a calculation row results in a value of 0.25, the system displays the results as 25.00%.

The results of the reporting calculation rows appear below the transaction group summary rows on the Project Valuation page for a project.

Field or Control	Description
Label	Enter a label, such as *Actual Labor as % of Budget,* that describes the formula that you enter in the corresponding reporting calculation row. Each label appears on the Project Valuation page with the results of the reporting calculation row.
Parenthesis	Enter a parenthesis as required to specify the sequence of calculations in the reporting calculations row.
Criteria ID	Enter the criteria ID for the row number of the transaction group to include in the formula. You can include up to three transaction groups in the formula.
Operator	Enter the operator symbol to add (+), subtract (−), multiply (*), or divide (/) the amount of the transaction group that you enter to the left of the **Operator** field, by the amount in the transaction group that you enter in the field to the right of the **Operator** field.

Example of Transaction Group Summary and Formula Results

This is an example of transaction group results on the Project Valuation page that are based on the sample data that is illustrated on the Valuation Template page:

This example illustrates the fields and controls on the Example of transaction group results on the Project Valuation page. You can find definitions for the fields and controls later on this page.

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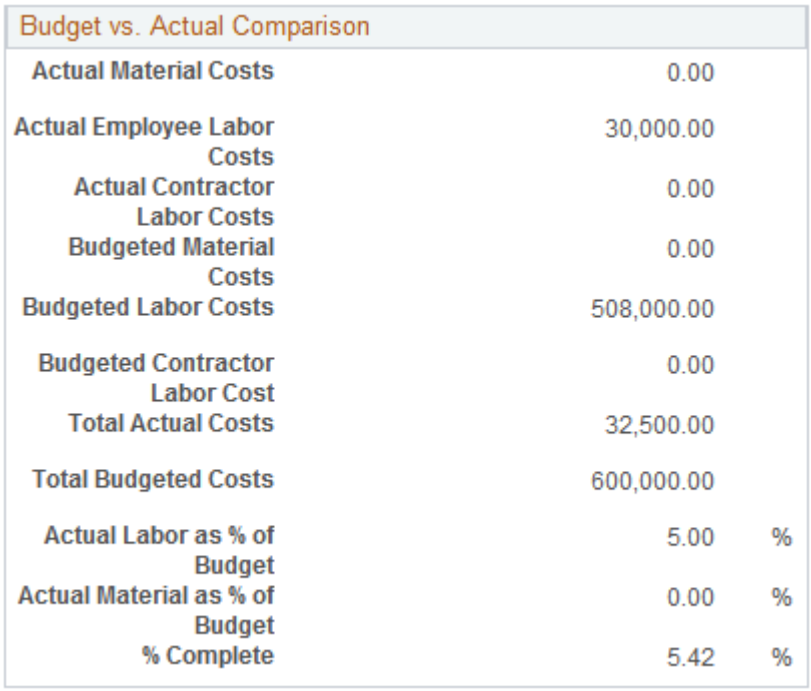

Budget vs. Actual Comparison		
Actual Material Costs	0.00	
Actual Employee Labor Costs	30,000.00	
Actual Contractor Labor Costs	0.00	
Budgeted Material Costs	0.00	
Budgeted Labor Costs	508,000.00	
Budgeted Contractor Labor Cost	0.00	
Total Actual Costs	32,500.00	
Total Budgeted Costs	600,000.00	
Actual Labor as % of Budget	5.00	%
Actual Material as % of Budget	0.00	%
% Complete	5.42	%

Project Overview

Enter analysis groups that the system summarizes and for which it divides the amounts by source, category, and subcategory. For example, you can combine the labor source type with the consulting category, label it as the *Consulting Labor* summary, and view the summary amounts for specified analysis groups on the Project Valuation page. You can enter up to three analysis groups and four ChartField combinations.

Field or Control	Description
Project Overview Label	Enter a label that appears as the project overview group box label in the Project Valuation page.
Analysis Group Columns - Label	Enter a column label for each analysis group that you select to appear in the Project Valuation page.
Analysis Group Columns - Analysis Group	Enter analysis groups that appear as columns in the project overview group box on the Project Valuation page. The system summarizes specified project-related ChartField amounts for the analysis groups that you enter in this field.
Project Chartfield Rows - Label	Enter a row label for each ChartField that you select to appear in the Project Valuation page.
Project Chartfield Rows - Source Type, Category, and **Subcategory**	Enter a value for one or more project-related ChartFields that the system uses to summarize analysis group amounts for this transaction group row on the Project Valuation page.

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Example of Project Overview Results

This example of a project overview on the Project Valuation page is based on the sample data that is illustrated on the Valuation Template page:

This example illustrates the fields and controls on the Example of project overview results on the Project Valuation page. You can find definitions for the fields and controls later on this page.

Project Overview

Cost Type	Actual	Budget
Employee Labor	30,000.00	508,000.00
Contract Labor	0.00	0.00
Material	0.00	0.00

Project Valuation Page

Use the Project Valuation page (PC_PRJ_ANALYTICS) to evaluate project summary-level information.

View project-level summaries based on user-specified criteria for transaction groupings and project overview information.

Navigation:

- **Project Costing**, and then **Project Definitions**, and then **Define Project General Info** . Click the **Project Valuation** link on the Project Definitions - General Information page.
- **Project Costing**, and then **Interactive Reports**, and then **Project Valuation Report**
- **Project Costing**, and then **My Projects**. Click the **Drill to Project Valuation** icon on the **Amounts** tab of the My Projects page.
- Click the project ID link in the Top Projects operational summary portal pagelet that is available in the PeopleSoft ESA Portal Pack.

> **Note**
>
> To find an existing project valuation when multiple valuation templates are defined for the business unit, enter the template ID in the Project Valuation component search page to narrow the list of project valuations from which to choose.

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

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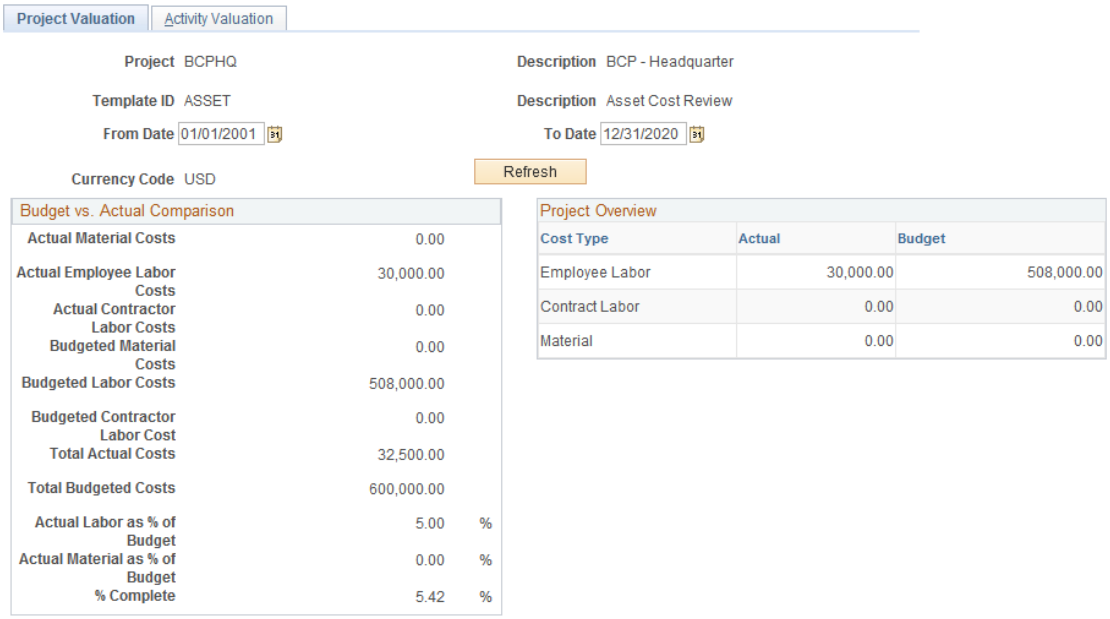

Select the business unit, project ID, and template ID.

> **Note**
>
> The system automatically calls the Project Valuation Calculation Application Engine process (PC_VALN_CALC) to calculate project and activity summary information.

The Project Valuation page appears with the selected project and template in the header. The default values for the **From Date** and **To Date** fields are based on your user preferences. If both dates are blank, the system returns all data that meets the search criteria. You can choose a different date range and the data on the project and activity valuation pages changes to display data only for the date range selected.

The valuation report uses the Project Transactions Summary table. Transactions in this table are grouped by month and posted using the first date of the current month. For example, a transaction with an accounting date and transaction date of November 14, 2005 appears in the Project Transactions Summary table with a date of November 1, 2005. If you want to include any transactions for a particular month in the valuation report, your selection criteria must include the first day of that month. For example, to retrieve results from transactions with dates that range from November 10, 2005 to November 20, 2005, you must select a from date of November 1, 2005.

The currency code is based on the currency defined for the project business unit. Transactional data is based on the Project Transactions Summary table.

Activity Valuation Page

Use the Activity Valuation page (PC_ACT_ANALYTICS) to view a breakdown by activity of the transaction group criteria from the project valuation template.

Navigation:

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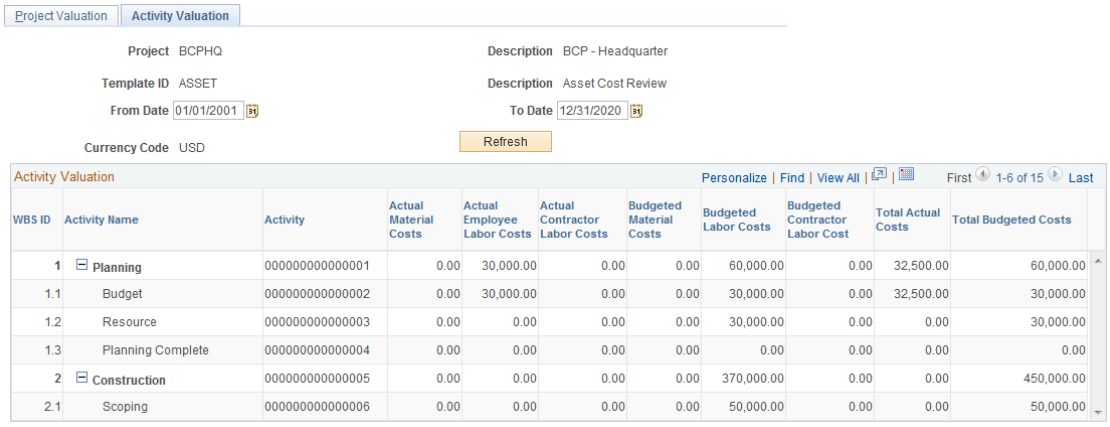
Select the Activity Valuation tab on the Project Valuation page.

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



Use this page to view a breakdown by activity based on the transaction group criteria from the Project Valuation template.

If the project contains summary activities, click the plus symbol (+) to expand summary activities and view activity detail.

Performing Flexible Analysis

To create a flexible analysis template, use the component (PC_SUM_TMPL).

Pages Used to Perform Flexible Analysis

Page Name	Definition Name	Usage
Flexible Analysis Template (new) Page	PC_SUM_TMPL	Create flexible analysis templates.
Flexible Analysis Template (existing) Page	PC_FLEX_UPD1_PG	Modify flexible analysis templates.
Flexible Analysis User Default Page	PC_FLEX_UPD2_PG	Edit the default flexible analysis template for a specific user. To access this page, click the **Change Default Template** button on the Flexible Analysis Template page for an existing template.
Flexible Analysis	PC_PROJSUMMARY_PNL	View project costs by activity group and drill down to view activity costs. To access this page, select **Project Costing**, and then **Interactive Reports**, and then **Flexible Analysis Report**

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Page Name	Definition Name	Usage
Refresh Summary Tables	PC_SUM_RFSH	Run the Refresh Summary Tables process to refresh PeopleSoft Project Costing summary tables. PeopleSoft Project Costing integration processes automatically update the summary tables that are used in Project Costing analytics. Use this page only under rare circumstances. To access this page, select**Project Costing**, and then **Utilities**, and then **Refresh Summary Tables**, and then **Refresh Summary Tables**

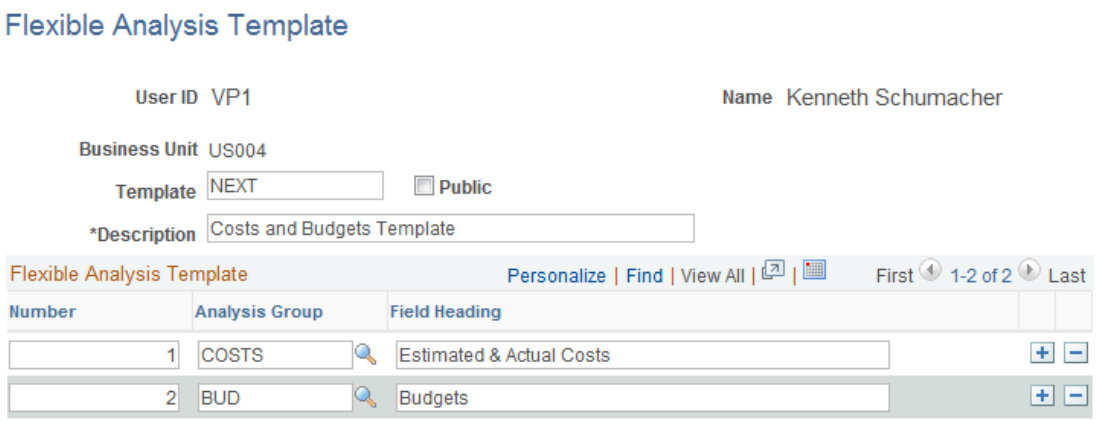
Flexible Analysis Template (new) Page

Use the Flexible Analysis Template (new) page (PC_SUM_TMPL) to create flexible analysis templates.

Navigation:

Project Costing, and then **Flexible Analysis Template**, and then **Flexible Analysis Template**. Click **Create New Template** for an existing template on the Flexible Analysis Template page.

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



Field or Control	Description
Number	Enter the number that represents the order of the analysis group columns that appear in the Flexible Analysis page.

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Field or Control	Description
Analysis Group	Select analysis groups that have: • The **Perform Multiplication** option selected. • Values defined in the **Quantity Multiplier** and **Amount Multiplier** fields. See Analysis Groups.
Field Heading	Enter the label that appears as the column heading for the analysis group on the Flexible Analysis page, or use the description of the analysis group that appears by default.

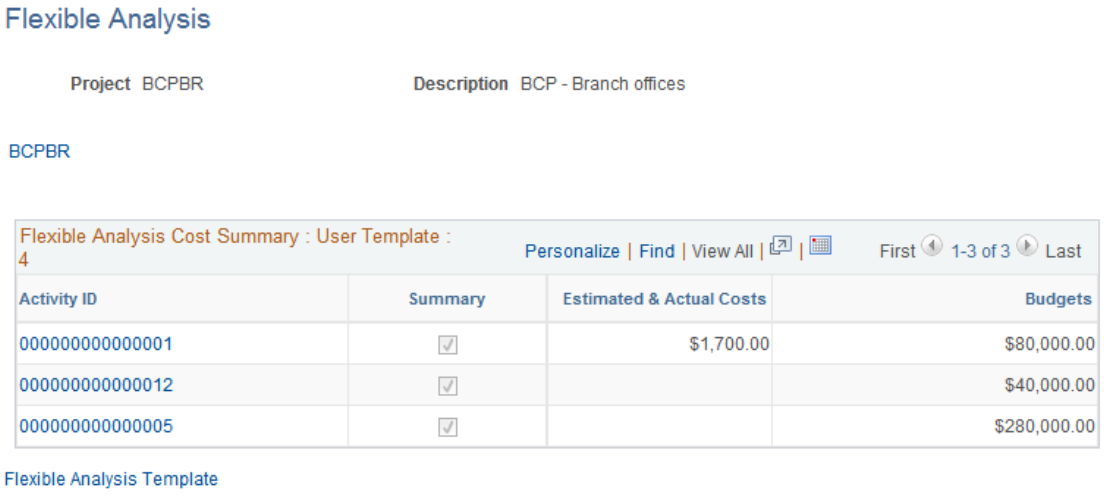
Flexible Analysis Template (existing) Page

Use the Flexible Analysis Template (existing) page (PC_FLEX_UPD1_PG) to modify flexible analysis templates.

Navigation:

Project Costing, and then **Flexible Analysis Template**, and then **Flexible Analysis Template**

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



This page uses information from the Project Activity Summary table (PC_ACTIVITY_SUM) that is extracted by the Project Costing Summary Application Engine process (PC_SUM). Summary tables are inception to date.

The Project Activity Summary table contains:

- Business unit
- Project
- Activity

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- Analysis type
- Currency code
- Amount

This page operates in deferred processing mode.

Flexible Analysis Cost Summary

The costs that appear in the **Flexible Analysis Cost Summary** grid are based on the analysis groups that are specified in the flexible analysis template. You can view different levels of project and activity information in the following way:

1. View costs at the project level for the selected analysis groups when you enter the page.
2. Click a link in the **Project** column to view the project's summary activity costs, if applicable.
3. Click a link in the **Activity ID** column for a summary activity to view the costs by detail activity.
4. Click a link in the **Activity ID** column for a detail activity to view costs by source type for the activity.
5. Click a link in the **Source Type** column to view costs by transaction categories.
6. Click a link in the **Category** column to view costs by transaction subcategories.

As you drill down to view the costs at greater levels of detail, links appear above the grid to illustrate the current level of analysis and provide access to previous levels.

Field or Control	Description
Detail	Click to access the Transaction List page and view individual transactions. This button appears when you view costs at the subcategory level.
Flexible Analysis Template	Click to access the Flexible Analysis Template page to create or modify flexible analysis templates.

Related Topics

- Viewing and Adding Transactions

Viewing Transactions in Progress

Pages Used to View Transactions in Progress

Page Name	Definition Name	Usage
Transactions in Progress Page	PC_TIP	Enter search criteria to display a list of project transactions that are in progress.
Transactions in Progress - Projects (Graphical) Page	PC_TIP2	View project transactions that are in progress in a chart format.

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Page Name	Definition Name	Usage
Transaction in Progress Summary Page	PC_PE_TIP_SUM	Run the Load Transactions in Progress Application Engine process (PC_PETIP_SUM) to refresh the transaction data from feeder systems that contain the PC Distribution Status field (PC_DISTRIB_STATUS) in their line records. **Project Costing**, and then **Utilities**, and then **Transaction in Process Summary**, and then **Transaction in Process Summary**

Transactions in Progress Page

Use the Transactions in Progress page (PC_TIP) to enter search criteria and display a list of project transaction details that are in progress.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Transactions in Progress**, and then **Transactions in Progress**

This example illustrates the fields and controls on the Transactions In Progress page (1 of 2). You can find definitions for the fields and controls later on this page.

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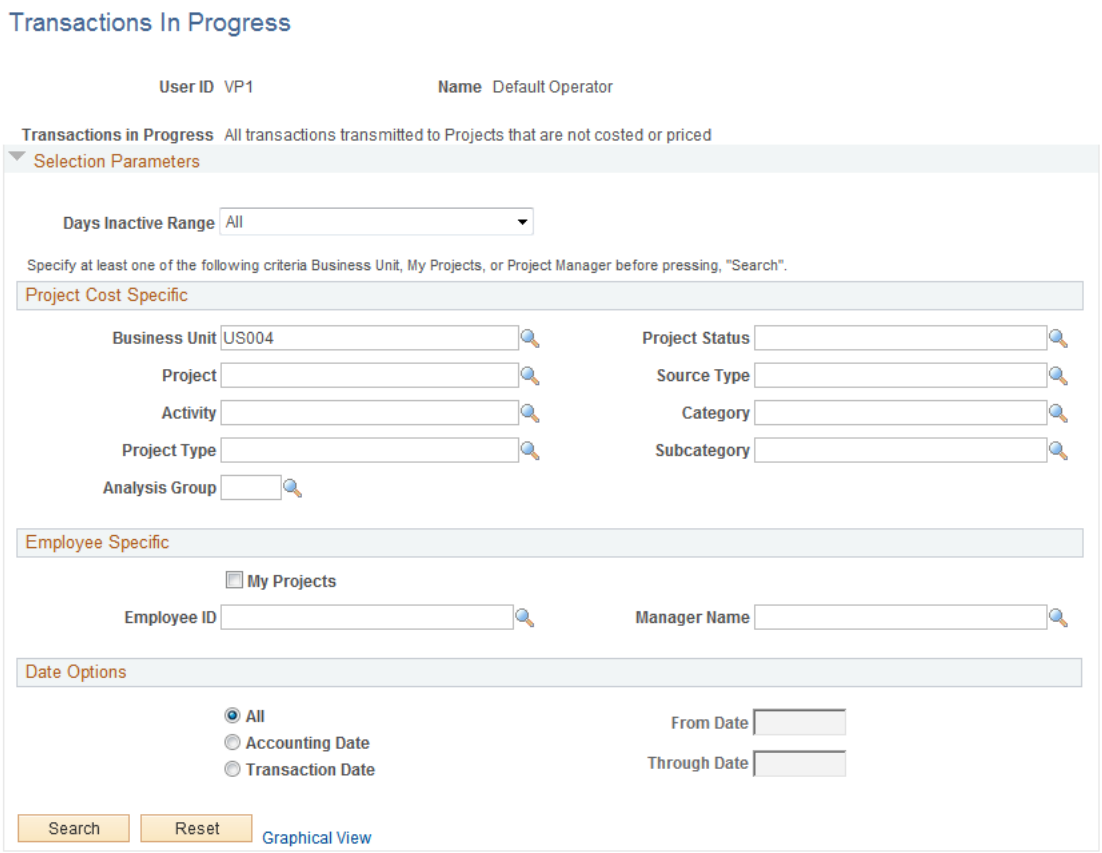

This example illustrates the fields and controls on the Transactions In Progress page (2 of 2). You can find definitions for the fields and controls later on this page.

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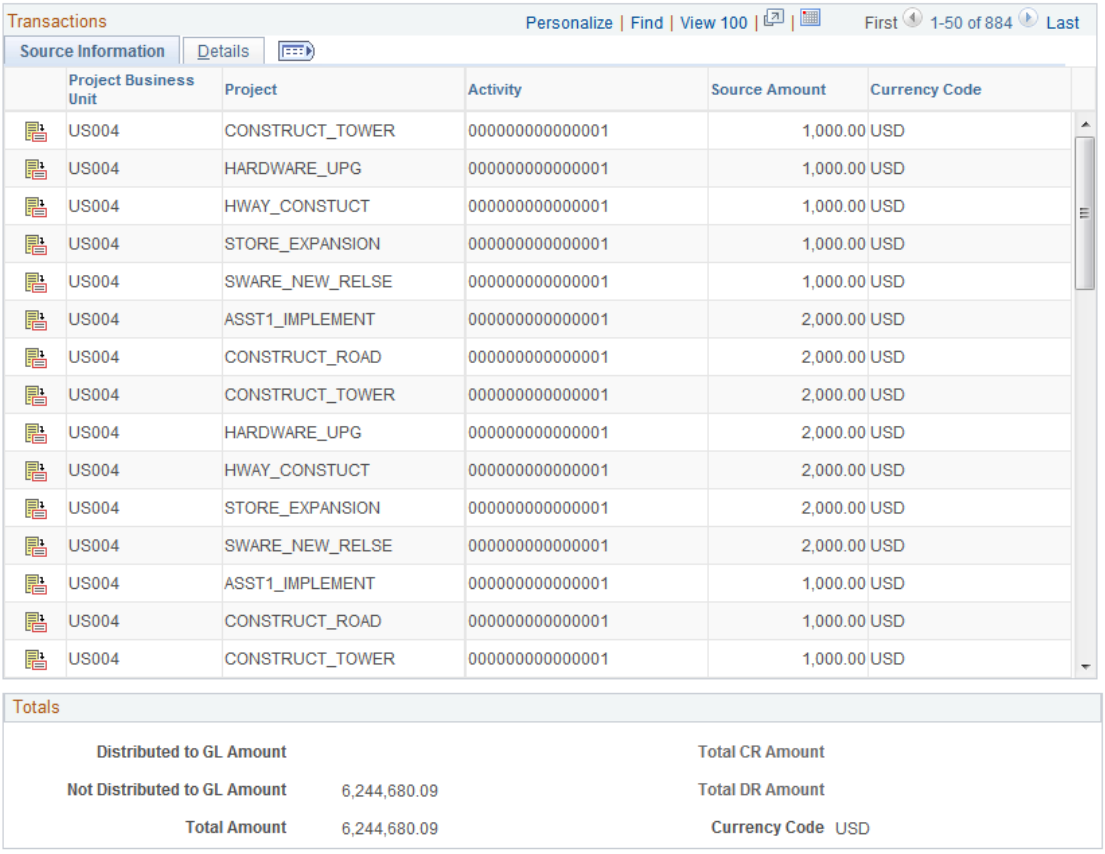

Transactions — Personalize | Find | View 100 | First 1-50 of 884 Last

Source Information | Details

Project Business Unit	Project	Activity	Source Amount	Currency Code
US004	CONSTRUCT_TOWER	000000000000001	1,000.00	USD
US004	HARDWARE_UPG	000000000000001	1,000.00	USD
US004	HWAY_CONSTUCT	000000000000001	1,000.00	USD
US004	STORE_EXPANSION	000000000000001	1,000.00	USD
US004	SWARE_NEW_RELSE	000000000000001	1,000.00	USD
US004	ASST1_IMPLEMENT	000000000000001	2,000.00	USD
US004	CONSTRUCT_ROAD	000000000000001	2,000.00	USD
US004	CONSTRUCT_TOWER	000000000000001	2,000.00	USD
US004	HARDWARE_UPG	000000000000001	2,000.00	USD
US004	HWAY_CONSTUCT	000000000000001	2,000.00	USD
US004	STORE_EXPANSION	000000000000001	2,000.00	USD
US004	SWARE_NEW_RELSE	000000000000001	2,000.00	USD
US004	ASST1_IMPLEMENT	000000000000001	1,000.00	USD
US004	CONSTRUCT_ROAD	000000000000001	1,000.00	USD
US004	CONSTRUCT_TOWER	000000000000001	1,000.00	USD

Totals

Distributed to GL Amount		Total CR Amount	
Not Distributed to GL Amount	6,244,680.09	Total DR Amount	
Total Amount	6,244,680.09	Currency Code	USD

Selection Parameters

Field or Control	Description
Days Inactive Range	Select an option that reflects the number of days between the current system date and the transaction date of the TIPs that you want to view. Available options are: *31 to 60* *61 to 90* *< 31* *> 90* *All*

Enter the remaining search criteria to filter TIPs and click **Search.** The list of TIPs appears in the **Transactions** grid.

Click the **Graphical View** link to view a chart that contains the listed TIPs.

Transactions

This grid lists the TIPs that meet the search criteria.

Click the **Drill to Source** icon to access the transaction source for the corresponding row. The type of TIP determines the page that opens when you click **Drill to Source.**

This table lists the pages that open when you click the **Drill to Source** icon:

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Transaction in Progress	Source Transaction Page
ALLTOPC	Transaction List page (PROJECT_EXPRESSG)
EXTOPC	View Expense Report - Expense Report Detail page (EX_SHEET_ENTRY)
TMTOPC	Time Report Inquiry component (TE_TIME_ENTRY_INQ) search page
INTOPC	Item Definition component (ITEM_DEFIN) search page
APTOPC	Voucher Accounting Entries page (VCHR_ACTG_ENTRIES)
APNOPY	Accounts Payable, Review Accounts Payable Info, Vouchers, Accounting Entries, Voucher Accounting Entries, Voucher Accounting Entries page (VCHR_ACTG_ENTRIES)
CANOPC	Customer Contracts, Determine Price and Terms, Related Projects page (CA_DETAIL_PROJ). Drill down to the Project Detail page. Project Costing, Project Definitions, General Information
GLTOPC	General Ledger, Journals, Process Journals, Review Journal Status, Journal Lines page (JOURNAL_LN_FS)
POTOPC	Drill down to the Purchase Order Inquiry - Purchase Order page (PO_LINE_INQ)
UNSPO	Purchasing Inquiry Purchasing, Purchase Orders, Review PO Information, Purchase Orders
REQTOPC	Purchasing, Requisitions, Add/Update Requisitions, Maintain Requisitions page (REQ_FORM) Drill down to Requisition Inquiry Purchasing, Requisitions, Review Requisition Information, Requisitions
UNSREQ	Drill down to Requisition Inquiry Purchasing, Requisitions, Review requisition information, Requisitions
BITOPC	Drill down to Billing Detail Billing, Review Billing Information, Details
ARTOPC	Drill down to Item Details Accounts Receivable, Customer Accounts, Item Information, View/Update Item Details
INACTPC	Drill down to Transaction List Project Costing, Transaction Definitions, Transaction List
BDTOPC	Drill down to Budget Detail Project Costing, Budgeting, Budget Detail
FATOPC	Drill down to Transaction List Project Costing, Transaction Definitions, Transaction List

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Source Information

Select this tab to view information from the transaction source, such as voucher, purchase order or page, the associated business unit, project, activity, currency, and more depending on the transaction source.

> **Note**
>
> Some subsystems do not require that you enter an activity ID for a project. However, PeopleSoft Project Costing requires that you enter activity ID for all projects. If a project does not have an activity ID, an error occurs. To enable you to view any projects that do not yet have an activity ID assigned, the **Activity** field is blank on the Source Information tab. Before these transactions are processed in Project Costing, you must assign an activity ID.

Details

Select this tab to view additional fields from the transaction. The fields that appear are based on the type of TIP that you select.

Totals

This group box displays the summarized amounts of debits and credits that are distributed and are not distributed to PeopleSoft General Ledger for the select TIP transactions. These values appear on the page only if the GL Distribution Status is *Distributed.*

The **Totals** group box shows the summarized values only when the currency code is the same for all the TIP transactions. If the TIP transactions have different currency codes, a message appears in the **Totals** group box.

<Application> Specific

Select the application-specific tab to view information that is specific to the PeopleSoft application in which the transaction originated. This tab is available for all types of PeopleSoft Project Costing TIPs except for the ALLTOPC type.

Transactions in Progress - Projects (Graphical) Page

Use the Transactions in Progress - Projects (Graphical) page (PC_TIP2) to view project transactions that are in progress in a chart format.

Navigation:

Click the **Graphical View** link on the Transactions in Progress page.

This example illustrates the fields and controls on the Transactions In Progress - Projects (Graphical) page. You can find definitions for the fields and controls later on this page.

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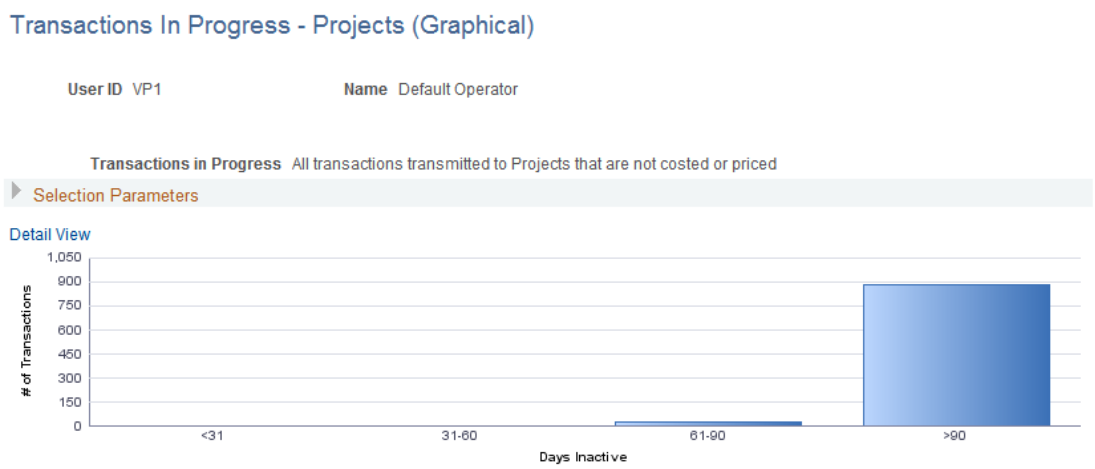

Use this page to view an aging report for the transactions in the inquiry.

Field or Control	Description
Selection Parameters	Expand this section to view the filtering options that the system used to select the TIPs for the graph.
Detail View	Click to return to the Transactions In Progress detail page to view the list of TIPs that appear in the chart.

Using the Projects Reconciliation Workbench

Pages Used to Review the Projects Reconciliation Workbench

Page Name	Definition Name	Usage
Projects Recon Workbench - Projects Page	PC_TIP_GROUP	Search for and review all Project Costing transactions not costed or priced for a project or specific project activity, and all unbilled transactions for the period when the project was inactive.
Projects Reconciliation Workbench - Billing Page	PC_TIP_GROUP_BI	Search for and review billing transactions in progress for a project or specific project activity.
Projects Reconciliation Workbench - Budgets Page	PC_TIP_GROUP_BD	Search for and review unposted project budgets, budgets not distributed to PeopleSoft Commitment Control, or budgets not distributed to PeopleSoft Project Costing for a project or specified project activity.

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Page Name	Definition Name	Usage
Projects Reconciliation Workbench - Contracts Page	PC_TIP_GROUP_CA	Search for and review any activities that are not assigned to a contract line that are sourced from PeopleSoft Grants, PeopleSoft Project Costing, or both for a project.
Projects Reconciliation Workbench - Expenses Page	PC_TIP_GROUP_EX	Review PeopleSoft Expenses transactions in progress for a project or specified activity.
Projects Reconciliation Workbench - Grants F & A (facilities and administration) Page	PC_TIP_GROUP_FA	Search for and review Grants F & A transactions in progress for a project or specified project activity.
Projects Reconciliation Workbench - General Ledger Pager	PC_TIP_GROUP_GL	Search for and review journal transactions in progress for a project or specified project activity.
Projects Reconciliation Workbench - Inventory Page	PC_TIP_GROUP_IN	Search for and review Inventory transactions in progress for a project or specified project activity.
Projects Reconciliation Workbench - Purchasing Page	PC_TIP_GROUP_PO	Search for and review purchase orders and requisitions in progress, unsourced purchase orders and requisitions in selected states for a project, or a specified project activity.
Projects Reconciliation Workbench - Payables Page	PC_TIP_GROUP_AP	Search for and review Payables transactions in progress, unpaid vouchers already distributed to Project Costing based on a selected payment method for a project, or a specified project activity.
Projects Reconciliation Workbench - Receivables Page	PC_TIP_GROUP_AR	Search for and review Receivables transactions in progress for a project or a specified project activity.

Projects Recon Workbench - Projects Page

Use the Projects Recon Workbench page (PC_TIP_GROUP) to search for and review all Project Costing transactions not costed or priced for a project or specific project activity, and all unbilled transactions for the period when the project was inactive.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Projects Recon Workbench** .Select the Projects Reconciliation Workbench tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench page (1 of 2). You can find definitions for the fields and controls later on this page.

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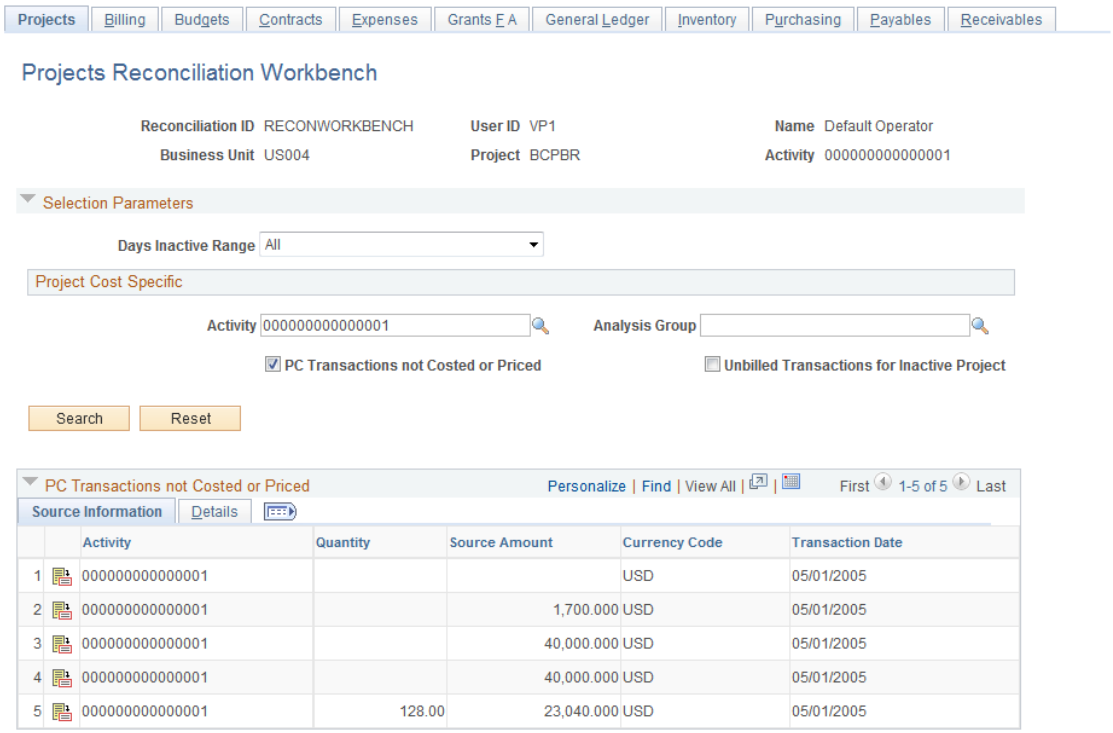

This example illustrates the fields and controls on the Projects Reconciliation Workbench page (2 of 2). You can find definitions for the fields and controls later on this page.

Field or Control	Description
Reconciliation ID (reconciliation identification)	Enter an ID for this Projects Reconciliation Workbench that represents a project scenario such as End of Month Close on the Projects Recon Workbench - Add a New Value page.
Business Unit	Enter or select the Project Costing business unit associated with the project that has the transactions in progress that you want to review by clicking the **Lookup** icon on the Projects Recon Workbench - Add a New Value page
Project	Enter or select the project that has the transactions in progress that you want to review by clicking the **Lookup** icon on the Projects Recon Workbench - Add a New Value page.

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Project Reconciliation Workbench Search Parameters

Field or Control	Description
Days Inactive Range	Select the range of days that this project was inactive from these values: • *31 to 60* The system searches for all days that the project was inactive between the 31st and 60th day of the project. • *61 to 90* The system searches for all days that the project was inactive between the 61st and 90th day of the project. • *< 30* The system searches for all days that the project was inactive prior to the 30th day of the project. • *> 90* The system searches for all days that the project was inactive beyond the 90th day of the project. • *All* The system searches for all days that the project was inactive during the entire length of the project. • *Blank* Selecting this option is equivalent to selecting the value *All.*
Activity	Select one of this project's activities if you want to review the transactions in progress for a single activity. If you leave this field blank, the system displays transactions in progress for all activities associated with the project. When you select an activity, the selected value appears in the **Activity** field on the header. The selected activity applies to all transactions that appear on any of the pages of the Projects Recon Workbench component.
Analysis Group	Select an analysis group associated with the selected project and activity. The analysis group that you select applies to all of the transactions that appear on any of the pages of the Projects Recon Workbench component. If you leave this check box blank, the system displays transactions in progress for all analysis groups associated with the selected project and activity.

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Field or Control	Description
PC Transactions Not Costed or Priced (Project Costing transactions not costed or priced)	Select this check box and click the **Search** button to display the PeopleSoft Project Costing transactions in progress that have not been costed or priced by PeopleSoft Project Costing in the **PC Transactions Not Costed or Priced** grid. If you leave this check box blank, no transactions appear in the **PC Transactions Not Costed or Priced** grid.
Unbilled Transactions for Inactive Project	Select this check box and click the **Search** button to display the unbilled transactions for the period that you specified in the **Days Inactive Range** field in the **Unbilled Transactions for Inactive Project** grid.
Search	Click this button after you define the selection parameters for this page to enable the system to search for and display the Project Costing transactions in progress based on your selections.
Save	Click to save the search parameters for this page. You can exit the component and later access the same reconciliation ID and return to this page, and the same search parameters that you entered when you saved it appear on the page.
Reset	Click to clear the selection parameters. This enables you to set up different parameters, perform a search, and save the search parameters for the page.

PC Transactions Not Costed or Priced

When you select the **PC Transaction Not Costed or Priced** check box in the Project Cost Specific selection parameters of this page and click the **Search** button, the system displays all of the Project Costing transactions in progress that have not been costed or priced by PeopleSoft Project Costing for the selected project or this project's selected activity, analysis group, or activity and analysis group depending on your selections.

You can click the **Detail** icon in each transaction's row to drill down to the transaction's source.

Unbilled Transactions for Inactive Project

When you select the **Unbilled Transactions for Inactive Project** check box in the Project Cost Specific selection parameters of this page and click the **Search** button, the system displays the unbilled transactions that occurred for the selected project and any other selected parameters for the period that you specified in the **Days Inactive Range** field.

You can click the **Detail** icon in each transaction's row to drill down to the transaction's detail information.

Projects Reconciliation Workbench - Billing Page

Use the Projects Reconciliation Workbench - Billing page (PC_TIP_GROUP_BI) to search for and review billing transactions in progress for a project or specific project activity.

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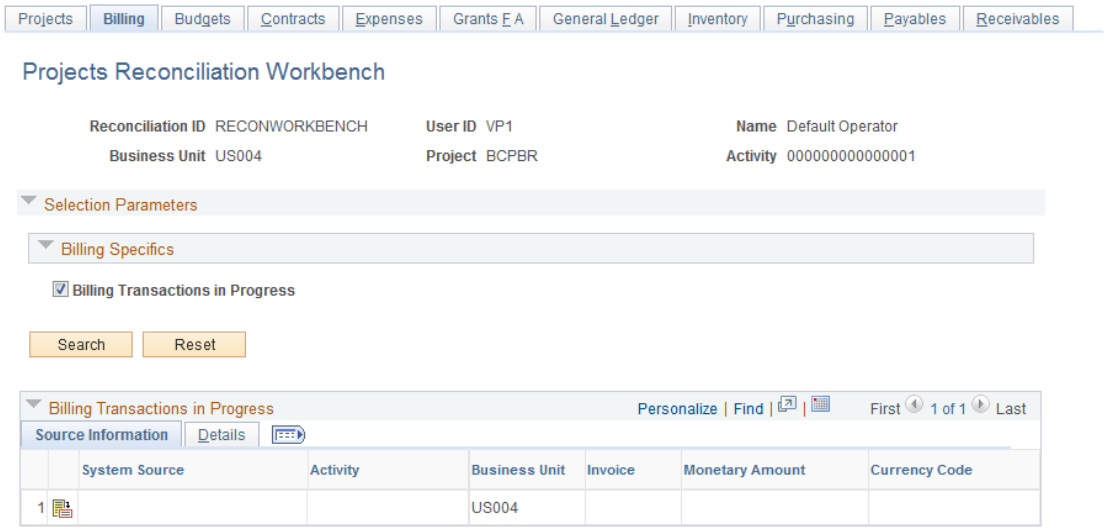
Navigation:

Project Costing, and then **Interactive Reports**, and then **Projects Recon Workbench** . Select the Billing tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Billing page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Billing Transactions in Progress	Select this check box and click the **Search** button to display any PeopleSoft Billing transactions in progress for this project or this project's activity in the **Billing Transactions in Progress** grid. Click the **Save** button to save the search criteria on this page. Click the **Detail** icon in a row on the grid to drill down to the source transaction.

Projects Reconciliation Workbench - Budgets Page

Use the Projects Reconciliation Workbench - Budgets page (PC_TIP_GROUP_BD) to search for and review unposted project budgets, budgets not distributed to PeopleSoft Commitment Control, or budgets not distributed to PeopleSoft Project Costing for a project or specified project activity.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench** . Select the Budgets tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Budgets page. You can find definitions for the fields and controls later on this page.

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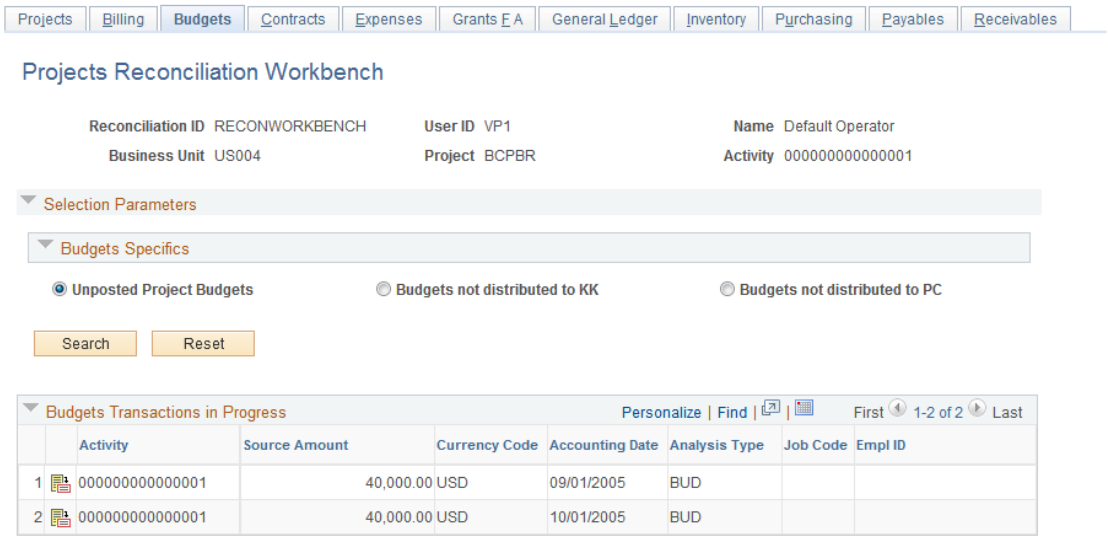

Field or Control	Description
Unposted Project Budget	Select this option and click the **Search** button to display all unposted budget transactions associated with the selected project or the project's selected activity in the **Budgets Transactions in Progress** grid.
Budgets not distributed to KK (budgets not distributed to Commitment Control)	Select this option and click the **Search** button to display all budget transactions that have not been distributed to Commitment Control and are associated with the selected project or the project's selected activity in the **Budgets Transactions in Progress** grid.
Budgets not distributed to PC(budgets not distributed to Project Costing)	Select this option and click the **Search** button to display all budget transactions that have not been distributed to PeopleSoft Project Costing and are associated with the selected project or project's selected activity in the **Budgets Transactions in Progress** grid. Click the **Save** button to save the Search criteria. Click the **Detail** icon in a row to drill down to the transaction's source.

Projects Reconciliation Workbench - Contracts Page

Use the Projects Reconciliation Workbench - Contracts page (PC_TIP_GROUP_CA) to search for and review any activities that are not assigned to a contract line that are sourced from PeopleSoft Grants, PeopleSoft Project Costing, or both for a project.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench** . Select the Contracts tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Contracts page. You can find definitions for the fields and controls later on this page.

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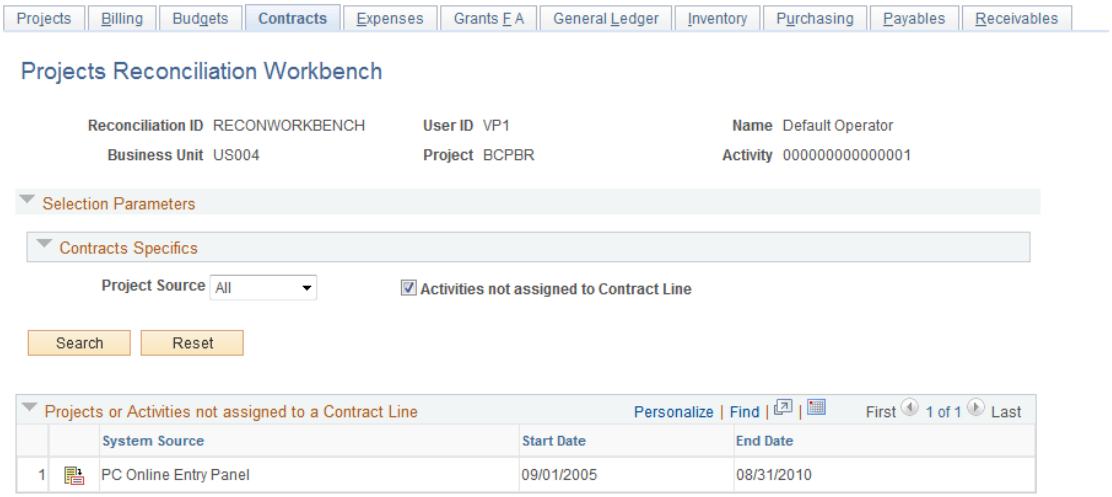

Field or Control	Description
Project Source	Select the source of a project that has activities that are not assigned to a contract line. Values are: • *All* • *GM* (Grants Management) • *PC* (Project Costing) The project is sourced from PeopleSoft Project Costing.
Activities not assigned to Contract Line	Select to display any activities associated with the project that are not assigned to a contract line based on the selected source. If you selected one activity on the Projects Reconciliation Workbench - Projects page, then only the selected activity appears if it is not assigned to the contract line. Click the **Save** button to save the search criteria.

Projects Reconciliation Workbench - Expenses Page

Use the Projects Reconciliation Workbench - Expenses page (PC_TIP_GROUP_EX) to review PeopleSoft Expenses transactions in progress for a project or specified activity.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench**. Select the Expenses tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Expenses page. You can find definitions for the fields and controls later on this page.

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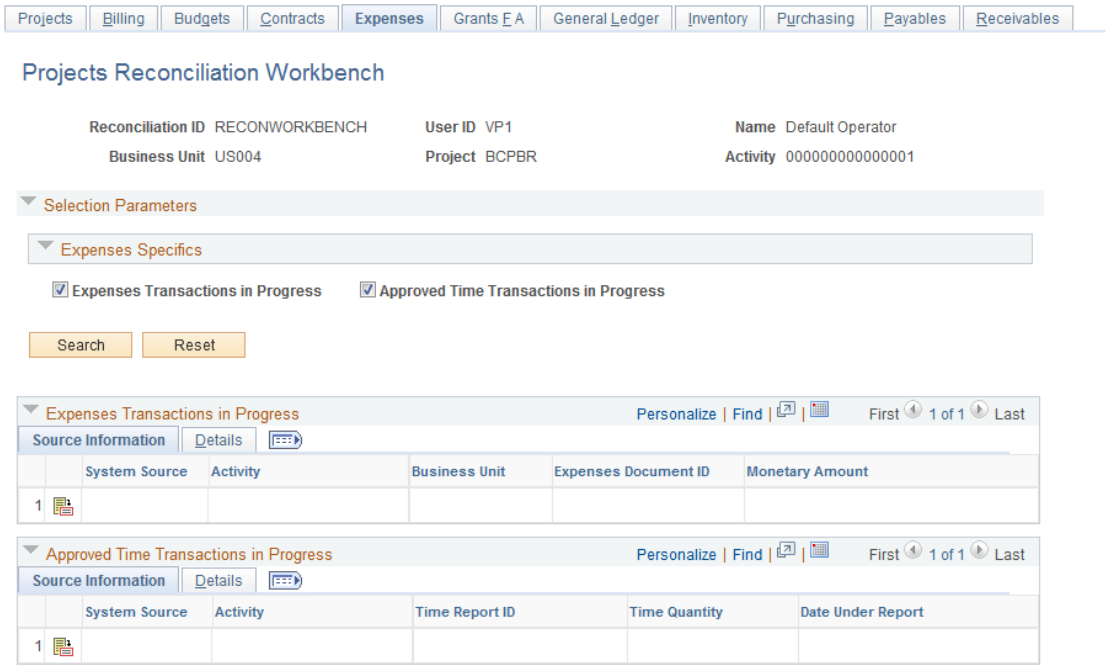

Field or Control	Description
Expenses Transactions in Progress	Select this check box and click the **Search** button to display any PeopleSoft Expenses transactions in progress associated with the project or the project's selected activity in the **Expenses Transactions in Progress** grid. Click the **Save** button to save the search criteria. Click the **Details** icon in a row to drill down to the source expenses transaction.
Approved Time Transactions in Progress	Select this check box and click the **Search** button to display any PeopleSoft Expenses-approved time transactions in progress associated with the selected project or the project's selected activity in the **Approved Time Transactions in Progress** grid. Click the **Save** button to save the search criteria. Click the **Details** icon in a row to drill down to the source approved time transaction.

Projects Reconciliation Workbench - Grants F & A (facilities and administration) Page

Use the Projects Reconciliation Workbench - Grants F & A (facilities and administration) page (PC_TIP_GROUP_FA) to search for and review Grants F & A transactions in progress for a project or specified project activity.

Navigation:

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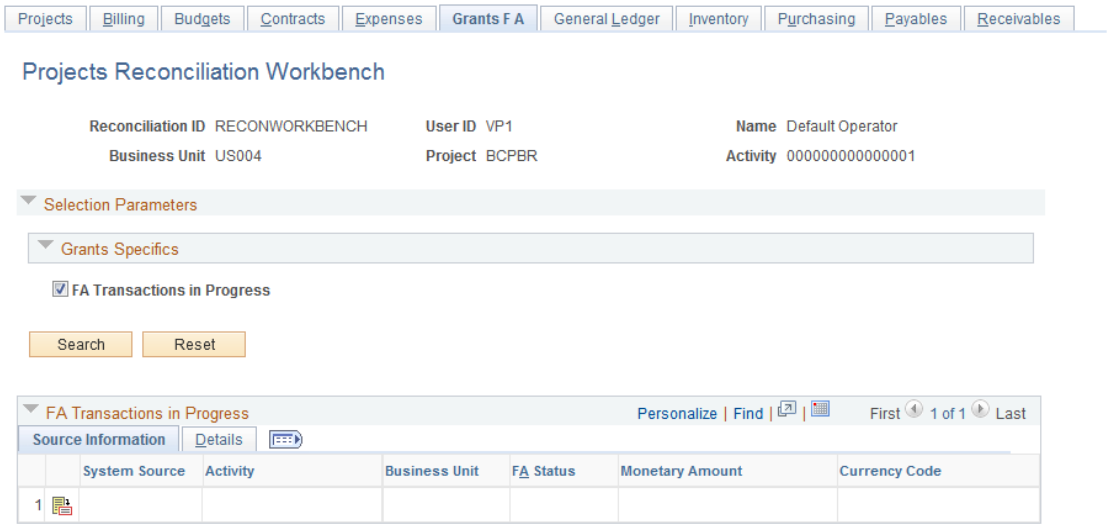
Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench**. Select the Grants F & A tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Grants F A page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
F & A Transactions in Progress(facilities and administration transactions in progress)	Select this check box and click the **Search** button to display PeopleSoft Grants facilities and administration transactions in progress associated with the selected project or the project's selected activity in the **F & A Transactions in Progress** grid. Click the **Save** button to save the search criteria. Click the **Detail** icon in a row to drill down to the source F & A transaction.

Projects Reconciliation Workbench - General Ledger Page

Use the Projects Reconciliation Workbench - General Ledger page (PC_TIP_GROUP_GL) to search for and review journal transactions in progress for a project or specified project activity.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench**. Select the General Ledger tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - General Ledger page. You can find definitions for the fields and controls later on this page.

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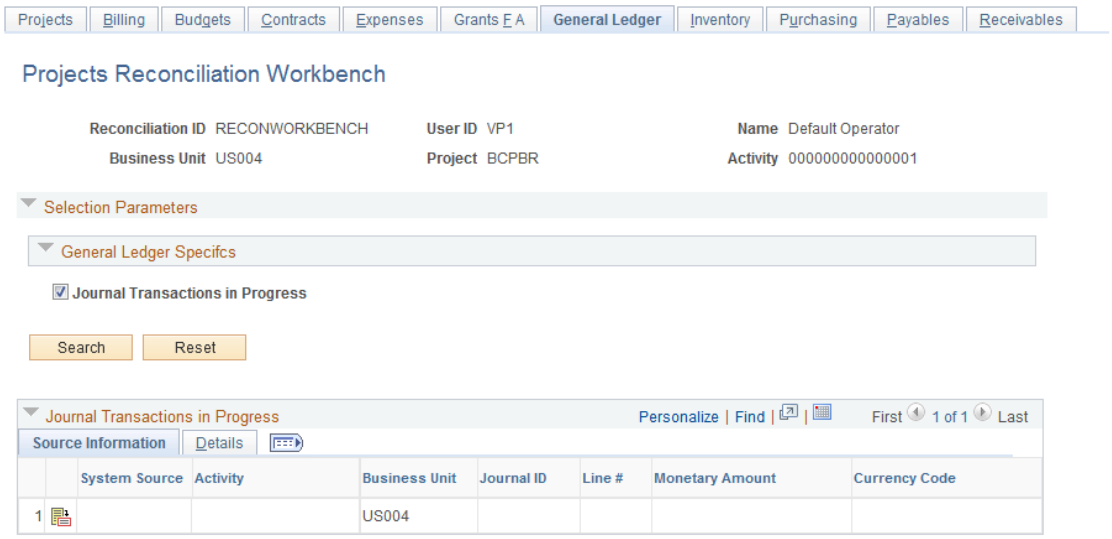

Field or Control	Description
Journal Transactions in Progress	Select this check box and click the **Search** button to display PeopleSoft General Ledger journal transactions in progress for the selected project or the project's selected activity in the **Journal Transactions in Progress** grid. Click the **Save** button to save the search criteria. Click the **Detail** icon in a row to drill down to the journal source transaction.

Projects Reconciliation Workbench - Inventory Page

Use the Projects Reconciliation Workbench - Inventory page (PC_TIP_GROUP_IN) to search for and review Inventory transactions in progress for a project or specified project activity.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench**. Select the Inventory tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Inventory page. You can find definitions for the fields and controls later on this page.

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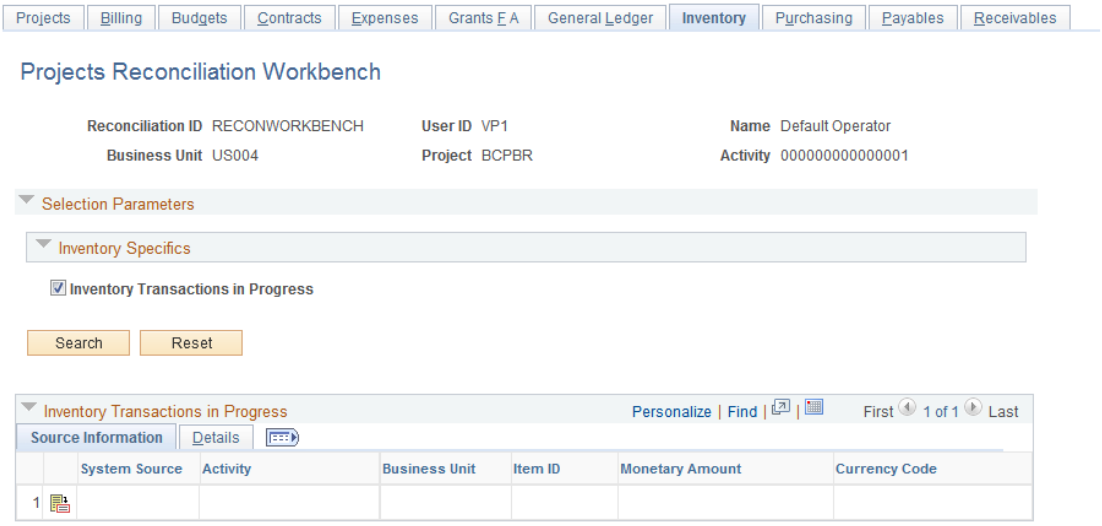

Field or Control	Description
Inventory Transactions in Progress	Select this check box and click the **Search** button to display PeopleSoft Inventory transactions in progress for the selected project or the project's selected activity in the **Inventory Transactions in Progress** grid. Click the **Save** button to save the search criteria. Click the **Detail** icon in a row to drill down to the Inventory source transaction.

Projects Reconciliation Workbench - Purchasing Page

Use the Projects Reconciliation Workbench - Purchasing page (PC_TIP_GROUP_PO) to search for and review purchase orders and requisitions in progress, unsourced purchase orders and requisitions in selected states for a project, or a specified project activity.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench**. Select the Purchasing tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Purchasing page (1 of 2). You can find definitions for the fields and controls later on this page.

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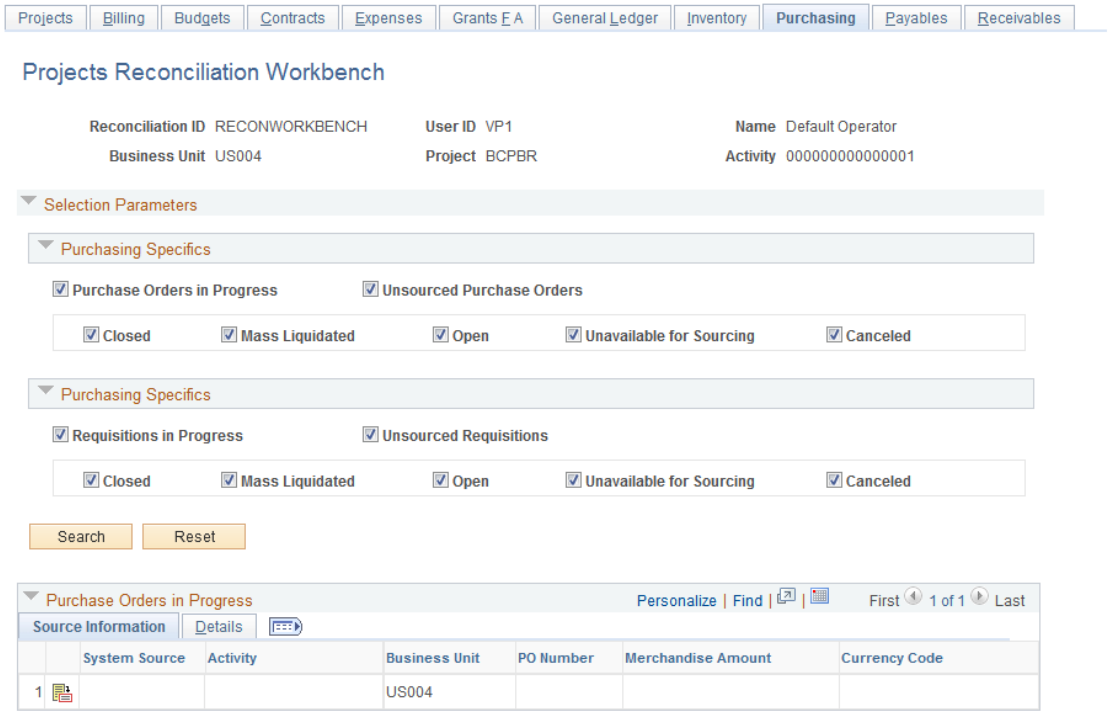

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Purchasing page (2 of 2). You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Purchase Orders in Progress	Select this check box and select the **Search** button to display PeopleSoft Purchasing purchase orders in progress in the **Purchase Orders in Progress** grid for the selected project or the project's selected activity for this project. If you do not select this check box, the system does not display any of these purchase orders in progress. Click the **Save** button to save the search criteria. Click the **Detail** icon in a row to drill down to the purchase order.
Unsourced Purchase Orders	Select this check box and select one or more of these purchase-order status check boxes: • **Closed** • **Mass Liquidated** • **Open** • **Unavailable for Sourcing** • **Canceled** Select the **Search** button to display PeopleSoft Purchasing unsourced purchase orders with one or more selected statuses in the **Unsourced Purchase Orders** grid for the selected project or the project's selected activity. If you do not select any of the status check boxes, the system does not display any unsourced purchase orders. Click the **Save** button to save the search criteria. Click the **Detail** icon in a row to drill down to the unsourced purchase order.
Requisitions in Progress	Select this check box and select the **Search** button to display PeopleSoft Purchasing requisitions in progress in the **Requisitions in Progress** grid for the selected project or the project's selected activity. If you do not select this check box, the system does not display any requisitions in progress. Click the **Save** button to save the search criteria. Click the **Detail** icon in a row to drill down to the requisition in progress.

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Field or Control	Description
Unsourced Requisitions	Click this check box and select one or more of these requisition status check boxes: • **Closed** • **Mass Liquidated** • **Open** • **Unavailable for Sourcing** • **Canceled** Select the **Search** button to display PeopleSoft Purchasing unsourced requisitions in progress with one or more selected statuses in the **Unsourced Requisitions** grid for the selected project or the project's selected activity. If you do not select any of these check boxes, the system does not display any of these requisition statuses. Click the **Save** button to save the search criteria. Click the **Detail** icon in a row to drill down to the unsourced requisition.

Projects Reconciliation Workbench - Payables Page

Use the Projects Reconciliation Workbench - Payables page (PC_TIP_GROUP_AP) to search for and review Payables transactions in progress, unpaid vouchers already distributed to Project Costing based on a selected payment method for a project, or a specified project activity.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench**. Select the Payables tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Payables page. You can find definitions for the fields and controls later on this page.

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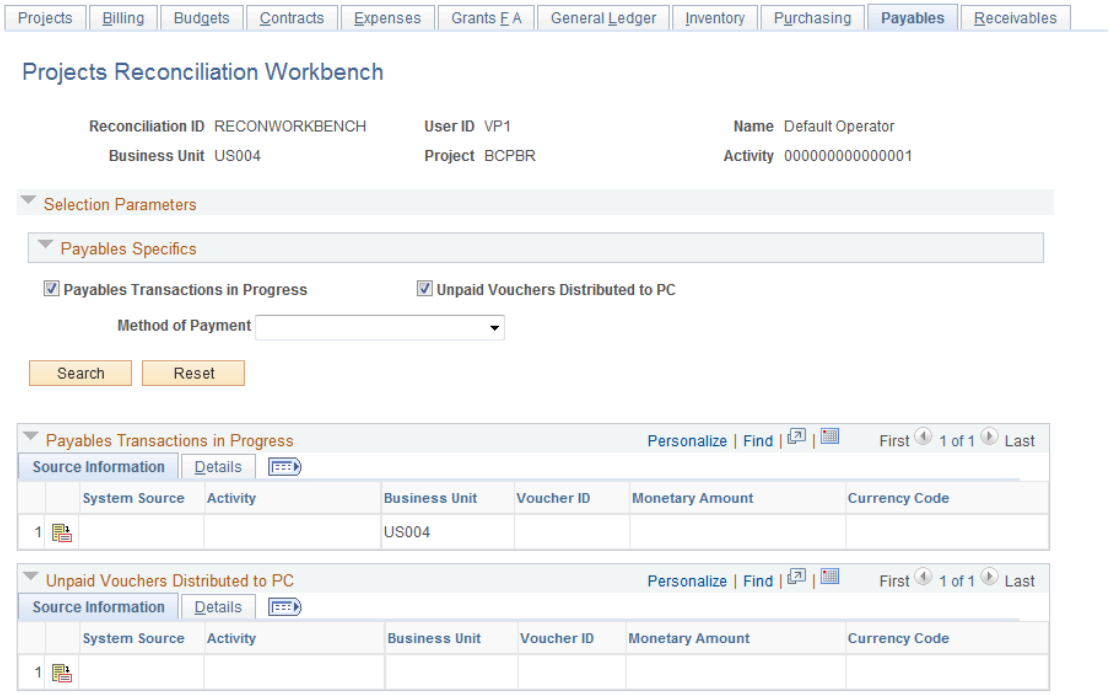

Field or Control	Description
Payables Transactions in Progress	Select this check box and click the **Search** button to display PeopleSoft Payables transactions in progress for the selected project or the project's selected activity in the **Payables Transactions in Progress** grid. Click the **Details** icon in a row to drill down to the Payables transaction.
Unpaid vouchers distributed to PC (unpaid vouchers distributed to Project Costing)	Select this check box and click the **Search** button to display PeopleSoft Payables unpaid vouchers that have been distributed to PeopleSoft Project Costing for the selected project or the project's selected activity for this project in the **Payables Unpaid vouchers distributed to PC** grid. If you select the **Unpaid vouchers distributed to PC** check box, the **Method of Payment** field is enabled. This field is enabled only if PeopleSoft Contracts is installed.

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Field or Control	Description
Method of Payment	If the contract was created based on an award generated in PeopleSoft Grants, then PeopleSoft Grants writes the required award information to PeopleSoft Contracts. This process creates a contract, adds a contract line to the contract, associates PeopleSoft Grants projects and activities with the contract line, and creates billing and revenue recognition plans. Due to this integration with PeopleSoft Contracts, you can generate bills and recognize revenue for all transactions that are associated with your sponsored awards. You can set up Billing defaults on the Billing Options page for the contract. If the contract is associated with an award from PeopleSoft Grants, you can select Cost Reimbursable or Letter of Credit as the default method of payment for the award on the Billing Options page of the contract. Select one of the following options if you selected the **Unpaid vouchers distributed to PC** check box: • *Blank* Selecting a blank field value displays all of the unpaid vouchers distributed to PeopleSoft Project Costing in the grid. • *LOC* (letter of credit) Selecting this option indicates a letter of credit was identified as the method of payment on the Billing Options page of the contract that will be used to pay out the award to the award's recipient based on the terms of a contract and the award. The system bills the sponsor that holds the letter of credit, the sponsor creates a voucher in PeopleSoft Payables, and the project and activity associated with the contract are updated in PeopleSoft Project Costing with unpaid voucher transactions in progress. See PeopleSoft Grants: Letter of Credit Processing. • *Cost Reimbursable* Select this method as part of establishing a bill schedule to use when reimbursement from the sponsor is based on clinical trials or deliverables instead of specific actual expenses. The sponsor usually outlines the bill schedule in the award document. Instead of using feeder systems to add transactions to the Project Resource table (PROJ_RESOURCE), you use the Add Transactions page in PeopleSoft Project Costing to add scheduled bill lines directly to the Project Resource table. See PeopleSoft Grants: Scheduled Billing. Click the **Save** button to save the search criteria.

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Field or Control	Description
	Click the **Details** icon to drill down to the unpaid voucher.

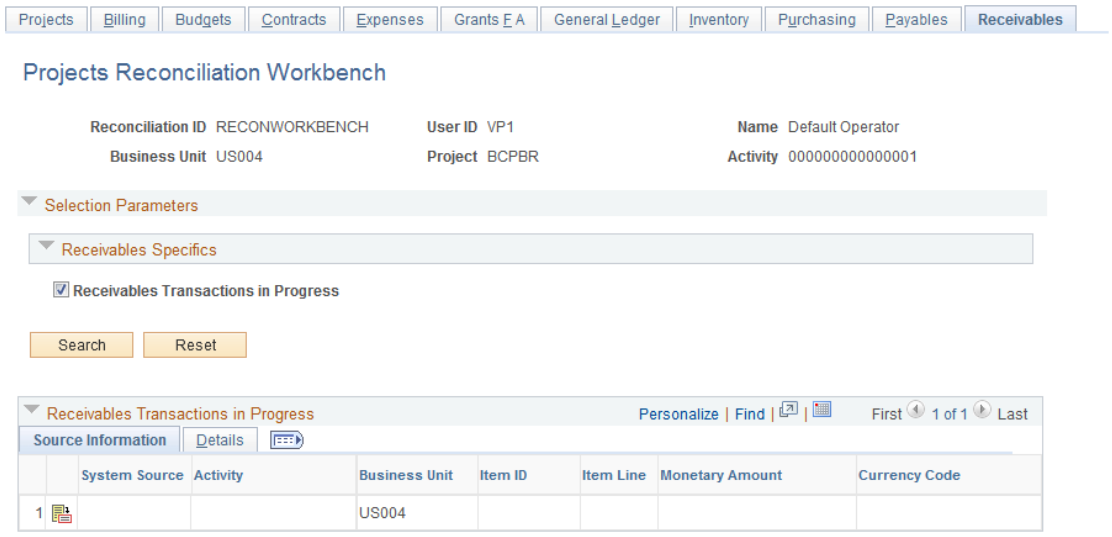
Projects Reconciliation Workbench - Receivables Page

Use the Projects Reconciliation Workbench - Receivables page (PC_TIP_GROUP_AR) to search for and review Receivables transactions in progress for a project or a specified project activity.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Recon Workbench**. Select the Receivables tab.

This example illustrates the fields and controls on the Projects Reconciliation Workbench - Receivables page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Receivables Transactions in Progress	Select this check box and click the **Search** button to display PeopleSoft Receivables transactions in progress in the **Receivables Transactions in Progress** grid for the selected project or the project's selected activity. Click the **Save** button to save the search criteria.

Analyzing Projects Using Analysis Inquiries

This topic lists the pages used to analyze projects by using analysis inquiries.

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Pages Used to Analyze Projects Using Analysis Inquiries

Page Name	Definition Name	Usage and Navigation
Summarize by Analysis Type Page	PROJECT_LTD_SUM	View a basic summary of costs that includes period-to-date, year-to-date, and life-to-date totals for each analysis type. Totals that appear on this page are for the selected project and all the activities that are directly attached to that project. Child projects are not included in the totals. **Project Costing**, and then **Review Costs**, and then **Review Cost by Analysis Type**
Set As of Period Page	PROJECT_LTD_SET	Change the period for the Summarize by Analysis Type and Summarize by Category pages, which enables you to analyze the project life-to-date costs as of a specific period. Select the Set As of Period tab on the Summarize by Analysis Type page.
Summarize by Category Page	PROJECT_LTD	View a cost summary by analysis type, source type, and category. **Project Costing**, and then **Review Costs**, and then **Review Cost by Category**
Time by Activity	PC_LABOR_ACT_TIME	Review labor by activity in a chart format. The system retrieves transactions from the Project Transactions Summary table (PC_SUMMARY_TBL) for transaction rows with an analysis type that belongs to the LABOR analysis group. **Project Costing**, and then **Review Costs**, and then **Review Cost Time by Activity**
Time by Employee Page	PC_LABOR_EMP_TIME	Review project labor by employee in a chart format. The system retrieves transactions from the Project Transactions Summary table (PC_SUMMARY_TBL) for transaction rows with an analysis type that belongs to the LABOR analysis group. **Project Costing**, and then **Review Costs**, and then **Review Cost Time by Employee**

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Analyzing Projects Using Accumulated Costs

This topic lists the pages used to analyze projects by using accumulated costs, which can be accessed by selecting **Project Costing**, and then **Review Costs**, and then **Accumulated Costs**.

Pages Used to Analyze Projects Using Accumulated Costs

Page Name	Definition Name	Usage
Review Assets Page	PC_AM_APPROVE	Review and approve asset costs, and send assets to PeopleSoft Asset Management tables.
Employees by Job Code Page	PC_JOBCODE_EMPL	View a list of employees for specific job codes.
Commitment Control Budget Exceptions Page	KK_XCP_BUDGET	Review projects costs that are related to Commitment Control budget exceptions.
Employee Costs by Activity Page	PROJ_RES_HR	View employee costs by activity. Drill down to personal data for a selected employee ID.
Employee Costs by Project Page	PROJ_EMPL_INQ	View employee costs by project. Drill down to personal data for a selected employee ID.
Inventory by Activity Page	PROJ_RES_IN	View inventory costs by activity and drill down into PeopleSoft Project Costing. The system retrieves transactions from the Project Transaction table where the inventory item ID is not missing.
Invoices by Activity Page	PC_INV_WKSHT	View invoices that are associated with an activity.
Journal Entries by Activity Page	PROJ_RES_GL	View journal entries that are associated with an activity and drill down to PeopleSoft General Ledger. The system retrieves transactions from the Project Transaction table where the journal ID is not missing.
Orders by Activity Page	PROJ_RES_OM	View orders that are associated with an activity and drill down to PeopleSoft Order Management. The system retrieves transactions from the Project Transaction table where the order number is not missing.

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Page Name	Definition Name	Usage
Purchase Orders by Activity Page	PROJ_RES_PO	View purchase orders that are associated with an activity and drill down to PeopleSoft Purchasing. The system retrieves transactions from the Project Transaction table where the purchase order ID is not missing.
Vouchers by Activity Page	PROJ_RES_AP	View vouchers that are associated with an activity and drill down to PeopleSoft Payables. The system retrieves transactions from the Project Transaction table where the voucher ID is not missing.

Calculating Percent Complete

Page Used to Calculate Percent Complete

Page Name	Definition Name	Usage
Calculate Percent Complete Page	PC_PERCENT	Specify run control parameters and run the Percent Complete Application Engine process (PC_PERCENT) to calculate project progress expressed as a percentage of the complete project.

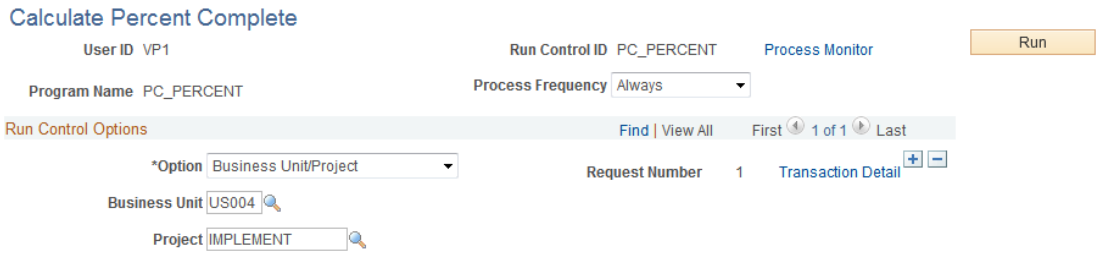
Calculate Percent Complete Page

Use the Calculate Percent Complete page (PC_PERCENT) to specify run control parameters and run the Percent Complete Application Engine process (PC_PERCENT) to calculate project progress expressed as a percentage of the complete project.

Navigation:

Project Costing, and then **Utilities**, and then **Calculate Percent Complete**, and then **Calculate Percent Complete**

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



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The **Percent Complete** field displays a project's progress at various levels of a project, and it is updated by the Percent Complete process. This process runs automatically when you change activity durations from these pages:

- Project Definitions - General Information page
- Activity Definitions - General Information page
- Project Activities page

When you save one of these pages, the Percent Complete process updates the **Percent Complete** field values that appear on these pages.

The methods for calculating percent complete are specified at the business unit level on the Project Costing Options page, and can be overridden at the project level on the Project Costing Definition page.

Related Topics

- Defining Project Options
  To define project options for business units, use the Project Costing Options component (PC_BUS_UNIT_OPT). Use the Project Costing Business Unit Options component interface (PROJECT_BU_OPTIONS) to load data into the tables for this component.
- Project Definitions - Project Costing Definition Page
  Use the Project Definitions - Project Costing Definition page (PROJECT_GEN_01) to define various project options, project currency, and analysis groups.

Setting Up and Analyzing Project Profitability

Pages Used to Set Up and Analyze Project Profitability

Page Name	Definition Name	Usage
Application Fundamentals: Installation Options - Project Costing Page	INSTALLATION_PC	Set up default analysis groups. The actual cost, actual revenue, forecast cost, and forecast revenue analysis groups are assigned to a project when the project is created. They determine how to calculate actual and forecast profitability. Users can override these values on the Project Costing Definition page.
Project Costing Definition Page	PROJECT_GEN_01	Define the profitability analysis groups for a project.
Actual Profitability Page	PC_EA_ACT_PROFIT	Analyze actual profitability. Use this page to compare the profit levels of selected projects for two periods.
Project Profitability Details Page	PC_EA_PROFIT_DTL	Analyze profitability details. Use this page to compare the budget, actual, revenue, and profit level of the selected project.

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Page Name	Definition Name	Usage
Project Profitability Details - Activity Details Page	PC_EA_PROFIT_DTL_SEC	Analyze the profit details for each activity within a project. Use this page to compare the budget, actual, revenue, and profit level of activities within the selected project. To access this page, click the description link of the project for the activities on the Project Profitability Details page.
Top 10 Profitable Projects Page	PC_EA_TOP_PROFIT	Analyze the top ten profitable projects. Use this page to display the top 10 projects that have the highest profit margin percent.

Common Elements

Field or Control	Description
Business Unit	Select a PeopleSoft Projects business unit. Results are limited to a single business unit and all amounts are displayed in the base currency of the business unit.
My Projects	Select to limit the result to those projects that are on the user's My Projects list.
Cost	Displays the sum of all transactions for which the analysis type is in the actual cost analysis group, which is determined on the Project Costing Definition page.
Revenue	Displays the sum of all transactions for which the analysis type is in the actual revenue analysis group, which is determined on the Project Costing Definition page. Results from two periods are displayed side by side.
Margin	Displays the amount of actual revenue – actual cost.
Margin Percent	Displays the amount of (actual margin / actual revenue) x 100.

Actual Profitability Page

Use the Actual Profitability page (PC_EA_ACT_PROFIT) to analyze actual profitability and compare the profit levels of selected projects for two periods.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Actual Profitability Report**

This example illustrates the fields and controls on the Actual Profitability page (1 of 2). You can find definitions for the fields and controls later on this page.

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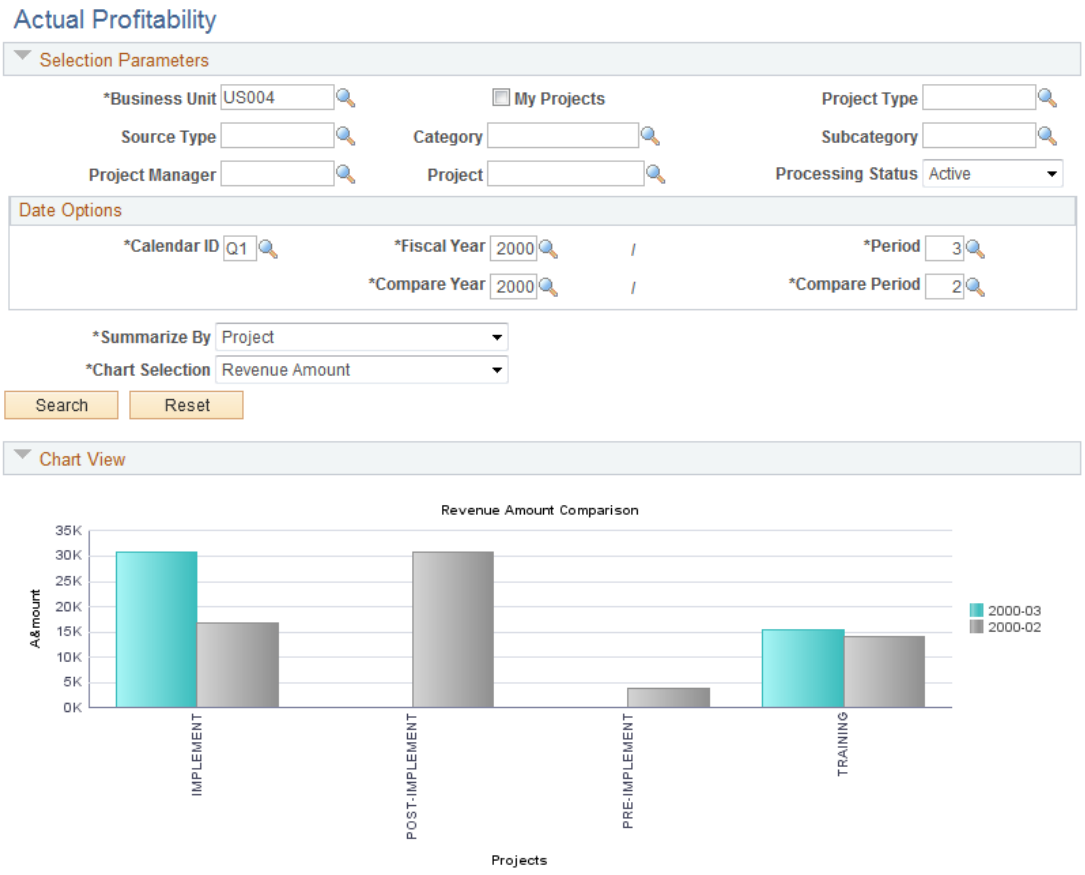

This example illustrates the fields and controls on the Actual Profitability page (2 of 2). You can find definitions for the fields and controls later on this page.

Grid View

Project	Description	Start Date	End Date	Processing Status	Currency Code	Revenue 2000-03	Revenue 2000-02	Cost 2000-03	Cost 2000-0
IMPLEMENT	Implementation	05/14/2002	06/11/2006	Active	USD	30,800.00	16,690.00	19,600.00	
POST-IMPLEMENT	Post-Implement	05/14/2002	06/11/2002	Active	USD	0.00	30,800.00	0.00	
PRE-IMPLEMENT	Pre-Implementation	05/14/2002	06/11/2002	Active	USD	0.00	3,871.50	0.00	
TRAINING	Training	05/14/2002	06/11/2002	Active	USD	15,400.00	14,195.55	9,800.00	

Use the Actual Profitability page to compare the profit levels of selected projects for two periods. Comparisons can be based on selection parameters. The page is divided into three collapsible sections:

- Selection parameters that enable the user to reduce the amount of data that is displayed.
- Chart view that enables the user to compare profit levels for two periods in a chart format.
- Grid view that enables the user to compare profit levels for two periods in a grid format.

Specification Parameters

Field or Control	Description
Fiscal Year	Select the first of the two years to be compared.

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Field or Control	Description
Period	Select the first of the two periods, within the year selected in the **Fiscal Year** field, to be compared.
Compare Year	Select the second of the two years to be compared.
Compare Period	Select the second of the two periods, within the year selected in the **Compare Year** field, to be compared.
Summarize by	Select how you want the data to be summarized when using the grid view. Options include *Project, Project Type,* and *Source Type.*
Chart Selection	Select how you want the chart to be displayed when using the chart view. Options include *Margin Bar Chart, Revenue Bar Chart,* and *Cost Bar Chart.*

Chart View

This view displays the results in a chart format and is based on the selection in the **Chart Selection** field. This section is collapsible.

Grid View

This view displays the results in a table format and is summarized based on the selection in the **Summarize by** field. This section is collapsible.

Field or Control	Description
Start Date and **End Date**	Displays the start date and the end date of the project. These columns are displayed only if you are summarizing by project.

Project Profitability Details Page

Use the Project Profitability Details page (PC_EA_PROFIT_DTL) to analyze profitability details and compare the budget, actual, revenue, and profit level of the selected project.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Project Profit Detail Report**

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

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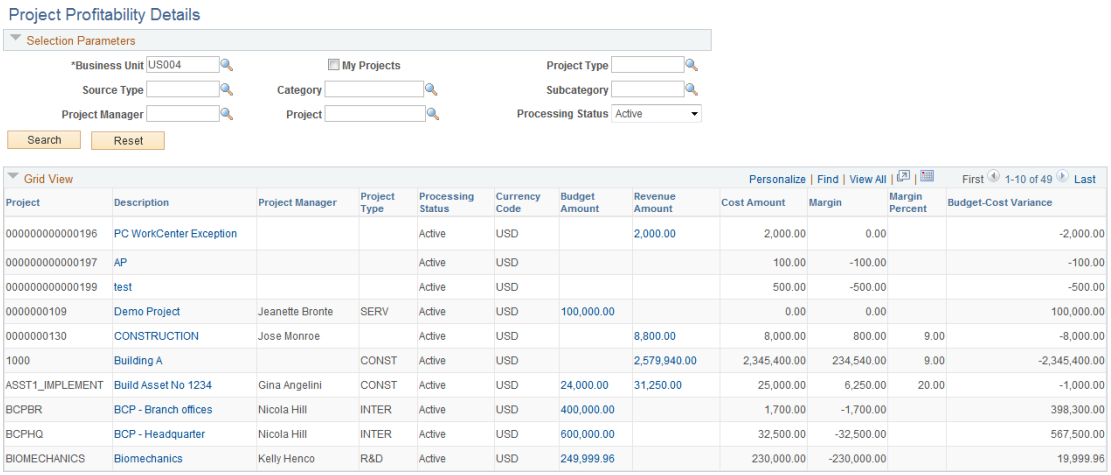

Project Profitability Details

Selection Parameters

*Business Unit US004 | My Projects | Project Type
Source Type | Category | Subcategory
Project Manager | Project | Processing Status Active
Search | Reset

Grid View — Personalize | Find | View All | First 1-10 of 49 Last

Project	Description	Project Manager	Project Type	Processing Status	Currency Code	Budget Amount	Revenue Amount	Cost Amount	Margin	Margin Percent	Budget-Cost Variance
000000000000196	PC WorkCenter Exception			Active	USD		2,000.00	2,000.00	0.00		-2,000.00
000000000000197	AP			Active	USD			100.00	-100.00		-100.00
000000000000199	test			Active	USD			500.00	-500.00		-500.00
0000000109	Demo Project	Jeanette Bronte	SERV	Active	USD	100,000.00		0.00	0.00		100,000.00
0000000130	CONSTRUCTION	Jose Monroe		Active	USD		8,800.00	8,000.00	800.00	9.00	-8,000.00
1000	Building A		CONST	Active	USD		2,579,940.00	2,345,400.00	234,540.00	9.00	-2,345,400.00
ASST1_IMPLEMENT	Build Asset No 1234	Gina Angelini	CONST	Active	USD	24,000.00	31,250.00	25,000.00	6,250.00	20.00	-1,000.00
BCPBR	BCP - Branch offices	Nicola Hill	INTER	Active	USD	400,000.00		1,700.00	-1,700.00		398,300.00
BCPHQ	BCP - Headquarter	Nicola Hill	INTER	Active	USD	600,000.00		32,500.00	-32,500.00		567,500.00
BIOMECHANICS	Biomechanics	Kelly Henco	R&D	Active	USD	249,999.96		230,000.00	-230,000.00		19,999.96

Use this page to compare the profit level of a project to the budget.

Field or Control	Description
Description	Displays the project description. Click the description link to view activity details.
Budget Amount	Displays the total amount of the finalized budget. Click the amount link to access the Budget Detail page.
Revenue Amount	Click to access the Manager Transaction Review page.
Budget–Cost Variance	Displays the amount of the budget minus the actual cost for the project.

Top 10 Profitable Projects Page

Use the Top 10 Profitable Projects page (PC_EA_TOP_PROFIT) to analyze the top ten profitable projects that have the highest profit margin percent.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Top Ten Profitable Project Rpt**

This example illustrates the fields and controls on the Top 10 Profitable Projects page (1 of 2). You can find definitions for the fields and controls later on this page.

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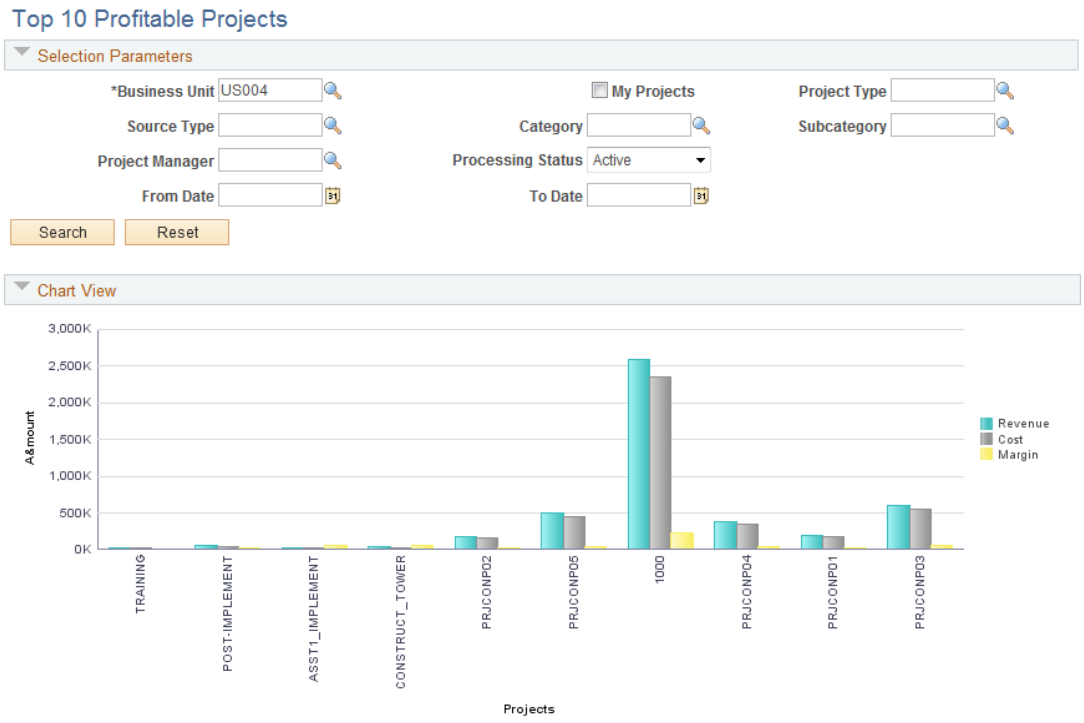

This example illustrates the fields and controls on the Top 10 Profitable Projects page (2 of 2). You can find definitions for the fields and controls later on this page.

Grid View — Personalize | Find | View All | First 1-10 of 10 Last

Project	Description	Project Manager	Project Type	Start Date	End Date	Processing Status	Currency Code	Revenue Amount	Cost Amount	Margin	Margin Percent
TRAINING	Training	Jennifer Luis	00000	05/14/2002	06/11/2002	Active	USD	29,595.55	20,575.00	9,020.55	30.00
POST-IMPLEMENT	Post-Implement	Jennifer Luis	00000	05/14/2002	06/11/2002	Active	USD	58,300.00	41,607.00	16,693.00	29.00
CONSTRUCT_TOWER	Track Costs for Tower A1234	Randy Unger	CAPTL	08/01/2012	08/01/2014	Active	USD	34,375.00	27,500.00	6,875.00	20.00
ASST1_IMPLEMENT	Build Asset No 1234	Gina Angelini	CONST	08/01/2012	08/01/2014	Active	USD	31,250.00	25,000.00	6,250.00	20.00
1000	Building A		CONST	09/01/2003	08/31/2004	Active	USD	2,579,940.00	2,345,400.00	234,540.00	9.00
PRJCONP03	ESA INSTALLATION			10/21/2003	10/21/2003	Active	USD	605,000.00	550,000.00	55,000.00	9.00
PRJCONP05	Post Install Consulting			10/21/2003	10/21/2003	Active	USD	495,000.00	450,000.00	45,000.00	9.00
PRJCONP04	Consulting Services			10/21/2003	10/21/2003	Active	USD	385,000.00	350,000.00	35,000.00	9.00
PRJCONP01	ALLOCATION			10/21/2003	10/21/2003	Active	USD	198,000.00	180,000.00	18,000.00	9.00
PRJCONP02	CUSTOMIZE			10/21/2003	10/21/2003	Active	USD	176,000.00	160,000.00	16,000.00	9.00

Use this page to display the top 10 projects that have the highest profit margin percent.

Use the chart view to display the results in a chart format. This section is collapsible.

Use the grid view to display the results in a table format. This section is collapsible.

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Reviewing and Adjusting Project Costs

Understanding the Project Manager Review Process

Project managers (PMs) need the ability to review and adjust project costs before a bill is generated. A history of all adjustments must be maintained in order to reconcile actual and charged amounts. The project manager review functionality provides a flexible tool that enables a PM to search on a number of fields, make necessary adjustments, and mark reviewed transactions.

By using the Project Manager Review component (PC_PM_REVIEW) project managers can review, adjust if necessary, and approve transactions before the transactions are sent through the billing process. If project managers determine that an adjustment is needed, they can modify the amount, quantity, project-related ChartFields (business unit, project, activity, type, category, and subcategory) and billable status. Then the project accountant assigns the general ledger-related ChartField values and determines if the adjustment will generate accounting entries in the Accounting Line for Contracts and Project Costing table (CA_ACCTG_LN_PC) to send to PeopleSoft General Ledger.

You can select the **Review Required for Billing** option on the Installation Options - Project Costing Integration page to activate a mandatory review process for the entire system. By using this option, a project transaction must be reviewed before it can be billed. With this option enabled, the Process Project Accounting Application Engine process (PSA_ACCTGGL) generates rows only from transactions with a PM_REVIEWED field value of *Yes* (reviewed), and ignores transactions that have not been reviewed. You can override the **Review Required for Billing** option at the project type level and for individual projects.

If you select the **Review Required for Billing** option at the installation level, you can specify the **Auto Review for Billing** option for a project type. This automatically marks all transactions for projects with that project type as reviewed, and bypasses the requirement for a project manager review. You can also select the **Auto Review for Billing** option on the Project Costing Definition page for specific projects.

During the process of reviewing project cost transactions, project managers can adjust the transactions prior to billing. The review functions that project managers can perform are:

- Specify individual transactions as billable or nonbillable.
- Review summarized transaction data at a high level where it is easier to focus.
- Adjust the amount, quantity, and project-related ChartField values for cost transactions.
- View billing, sharing, and revenue transactions.

Making adjustments by using the Project Manager Review component is a two-step process. First, the project manager accesses the Transaction Adjustment page from the Manager Transaction Review component (PC_PM_REVIEW) to make project-related adjustments, including adjustments to quantities, amounts, and project-related ChartField information. Second, the project accountant accesses the Adjustments page **(Project Costing**, and then **Accounting**, and then **Accounting Adjustments**to review the adjustments made by the project manager, assign GL-related ChartField information, and determine whether to generate journal entries.

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Adjusting a Single Transaction

To adjust ChartField values for a single transaction:

1. Select the transaction row that you want to adjust on the Manager Transaction Review page.

   Alternatively, select the transaction row on the Transaction Adjustment page in the Transaction Adjustment component.
2. Choose the adjustment type on the Choose type of adjustment page.

   The Transaction Adjustment page appears showing the ChartField values in the New Transaction Lines scroll area from the original transaction.
3. Enter new values as required in the **New Transaction Lines** scroll area.
4. Remove values to leave fields empty in the new transaction.
5. Click **Finish** to review the changes and compare the original and new transactions.

Adjusting Multiple Transactions

To adjust multiple transactions:

1. Select more than one transaction row that you want to adjust on the Manager Transaction Review page.

   Alternatively, select more than one transaction row on the Transaction Adjustment page in the Transaction Adjustment component.

   > **Note**
   >
   > By using the Manager Transaction Review page, you can review and adjust multiple transactions from different activities in a project at the same time. By using the Transaction Adjustment page, you can review and adjust multiple transactions from a single project activity.
2. Choose the adjustment type on the Choose type of adjustment page.

   The Transaction Adjustment page appears showing only the project business unit, project, activity, and other default values in the **New Transaction Lines** scroll area. ChartField values from the original transactions do not appear by default in the **New Transaction Lines** scroll area when you adjust multiple transactions.
3. Enter new values as required in the **New Transaction Lines** scroll area.

   Values that you enter in the **New Transaction Lines** scroll area apply to all transactions that appear in the **Selected Project Transactions for Adjustment** grid. Fields that you do not change on this page (fields that you leave blank) retain their original values in the adjusted transactions.
4. Click **Finish** to review the changes and compare the original and new transactions.

Example of Adjusted Transaction Rows in the Project Transaction Table

Assume that PeopleSoft Project Costing receives a time entry transaction from the PeopleSoft Expenses system for a quantity of 10 hours. The transaction contains a TLX analysis type. Then you run the Pricing process, which uses the original transaction and the employee's cost rate (180 USD) and bill rate (290 USD) to create an actual cost row and billing row. The resulting rows in the Project Transaction table (PROJ_RESOURCE) are:

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Analysis Type	Description	Quantity	Amount
TLX	Original transaction	10 MHR (work hours)	
ACT	Transaction priced for costing	10 MHR	1,800 USD
BIL	Transaction priced for billing	10 MHR	2,900 USD

During the project manager review, you discover that the transaction quantity should have been entered as 8 MHR. The first step is to create an adjustment row by using a transaction adjustment type of Adjust Amounts and enter a new quantity of 8 USD. When you finalize the adjustment, the system creates a transaction with a quantity of −2 MHR and sends the adjustment row through the Pricing process. The resulting rows in the Project Transaction table are:

Analysis Type	Description	Quantity	Amount
TLX	Original row	10 MHR (work hours)	
ACT	Transaction priced for costing	10 MHR	1,800 USD
BIL	Transaction priced for billing	10 MHR	2,900 USD
TLX	Adjustment	−2 MHR	
ACT	Adjustment priced for costing	−2 MHR	−360 USD
BIL	Adjustment priced for billing	−2 MHR	−580 USD

The second step in this adjustment process is for the project accountant to use the Adjustments page to enter any necessary changes to GL-related ChartFields, and to determine if journal entries should be created and sent to the Accounting Line for Contracts and Project Costing table for processing to GL. If the GL distribution status on the adjusted transaction row is *Ignore,* no journal entries are sent to the Accounting Line for Contracts and Project Costing table. If the GL distribution status is *Not Done,* the journal entries are sent to the Accounting Line for Contracts and Project Costing table.

Summarizing Transactions for Project Manager Review

To define templates that are used to summarize transactions for project manager review, use the PM Summary Template component (PC_PM_SUMM_TMPL).

Pages Used to Summarize Transactions for Project Manager Review

Page Name	Definition Name	Usage
Manager Transaction Review page	PC_PM_SRCH_DLG	Specify search criteria to create a list of transactions for project manager review.
Select Project Activities Page	PC_PM_SEL_ACTVS	Specify project activities to include in the search criteria for review transactions.

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Page Name	Definition Name	Usage
Transaction Summary Template Page	PC_PM_SUMM_TMPL	Select the fields by which transactions are summarized when they are displayed for project manager review.

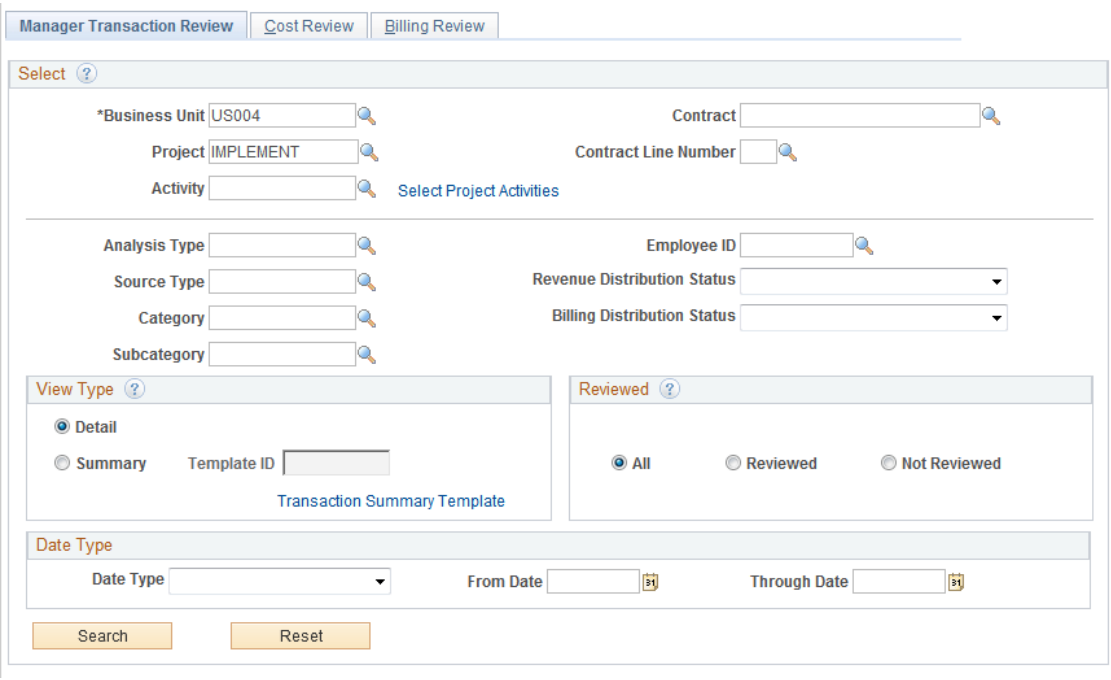
Manager Transaction Review page

Use the Manager Transaction Review page (PC_PM_SRCH_DLG) to specify search criteria to create a list of transactions for project manager review.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Manager Transaction Review**, and then **Manager Transaction Review**

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



Select

Project managers enter search criteria to filter project transactions to review.

Field or Control	Description
Select Project Activities	Click to access the Select Project Activities page, where you can select specific project activities as part of the search criteria.

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Field or Control	Description
Contract and Contract Line Num	Enter appropriate contract and/or contract line number as a search criteria to filter project transactions for review in the search result.
Separate Period of Performance Exceptions	Select to separate period of performance exceptions rows in the transaction search result. When you select this check box all the transactions that do not fall in the contract's period of performance start and end dates are displayed in a separate Period of Performance Review page. The search result displayed in the Cost, Billing, Revenue, and Sharing pages will then exclude the period of performance exceptions. **Note:** This check box is displayed only if Review Required for Period of Performance check box is selected on the Application Fundamentals: Installation Options - Project Costing Integration Page.
Revenue Distribution Status	Select one of these values to limit the search to transaction rows with the selected revenue distribution status: *Create:* Transaction rows that have been priced for revenue. *Distrib* (distribute): Revenue transactions that have been sent to GL. *Generate:* Revenue transactions where journal entries have been generated and written to the Accounting Line for Contracts and Project Costing table. *Ignore:* Revenue transactions that will not be priced. *Not Done:* Revenue transactions that are ready to be priced. This distribution status is typically set to *N* (not done) when a transaction is entered by using the Add Transactions page in PeopleSoft Project Costing and the transaction is eligible to be priced for revenue.

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Field or Control	Description
Billing Distribution Status	If you use this field as part of the search criteria, select one of these options: *Distribute:* Transactions that have completed the billing process. *Ignore:* Transactions that are not eligible to be priced for billing or are not part of the billing process. *Not Done:* Transactions that are eligible to be priced for billing, but have not gone through the Pricing Application Engine process (PC_PRICING). This distribution status is typically set to *N* when a transaction is entered by using the Add Transactions page in PeopleSoft Project Costing and the transaction is eligible to be priced for billing. Additionally, when Project Costing imports a transaction from feeder systems such as PeopleSoft Time and Labor, the Application Engine that brings the cost transactions into Project Costing initially sets the distribution status to *N*. The Pricing process updates this status after the transaction is priced for billing. *Priced:* Transactions that have gone through the Pricing process and have been priced for billing. *Unbillable:* Transactions that do not qualify for billing. *Worksheet:* Transactions that are currently in the billing worksheet.

View Type

Field or Control	Description
Detail	Select this option for each detailed transaction row to appear on the Cost Review page.
Summary	Select this option and specify a summary template for transactions to appear in a summary format based on the fields that are selected on the summary template. You can adjust transactions only in a detail view, not in a summary view.
Template ID	If you select the **Summary** option, you must select a template that defines how transactions are summarized. **Note:** If you select the Detail option then this field is disabled.
Transaction Summary Template	Click to access the Transaction Summary Template page to add or modify templates.

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Reviewed

Field or Control	Description
All	Select to view all of the transactions that match the search criteria on this page.
Reviewed	Select to view only the transactions that match the search criteria on this page that the project manager previously reviewed.
Not Reviewed	Select to view only the transactions that match the search criteria on this page that the project manager has not reviewed.

Other Page Elements

Field or Control	Description
Date Type	Select *Accounting Date* or *Transaction Date* to filter transactions by date. You must enter a date range in the **From Date** and **Through Date** fields if you select a date type.
Search	Click for the system to retrieve a list of transactions that match your search criteria. The Cost Review page automatically appears with the search results. You can retrieve a maximum of 1,000 transactions on review pages in the Project Manager Review component.
Reset	Click to clear all field entries that are on the page.

Select Project Activities Page

Use the Select Project Activities page (PC_PM_SEL_ACTVS) to specify project activities to include in the search criteria for review transactions.

Navigation:

Click the **Select Project Activities** link on the Manager Transaction Review page.

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

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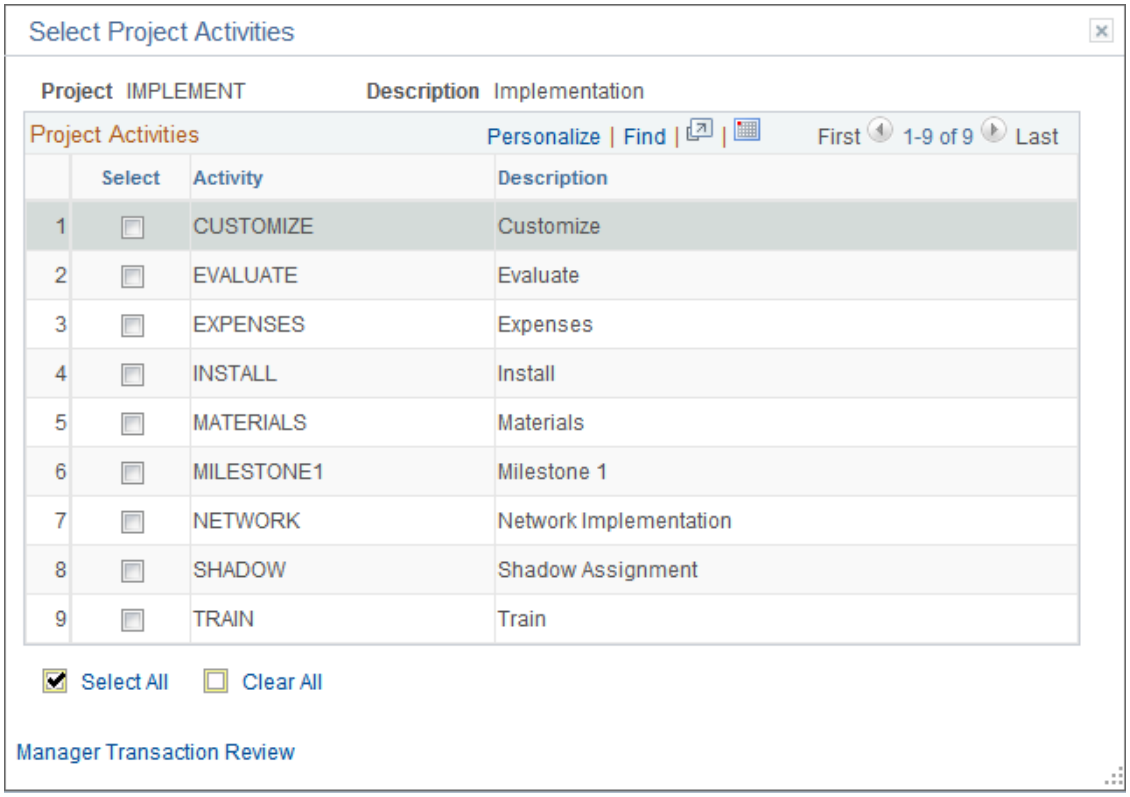

This page lists the activities that are associated with the project that you selected on the Manager Transaction Review page.

Select or deselect the **Select All** option to include or exclude all activities that are in the list, or select up to 20 individual activities. The system uses the selected activities as part of the transaction search criteria.

Field or Control	Description
☑	Select the **Select All** icon to include all activities that are in the list. Optionally you can select up to 20 individual activities. The system uses the selected activities as part of the transaction search criteria.
☐	Select the **Clear All** icon to deselect the check boxes, which excludes all activities that are in the list.
Manager Transaction Review	Click to return to the Manager Transaction Review page. On the Manager Transaction Review page, if you have selected only one activity on the **Select Project Activities** page then that activity will be displayed. If you have selected more than one activity then the **Activity** field will be blanked out. The number of selected activities appears next to the **Select Project Activities**link.

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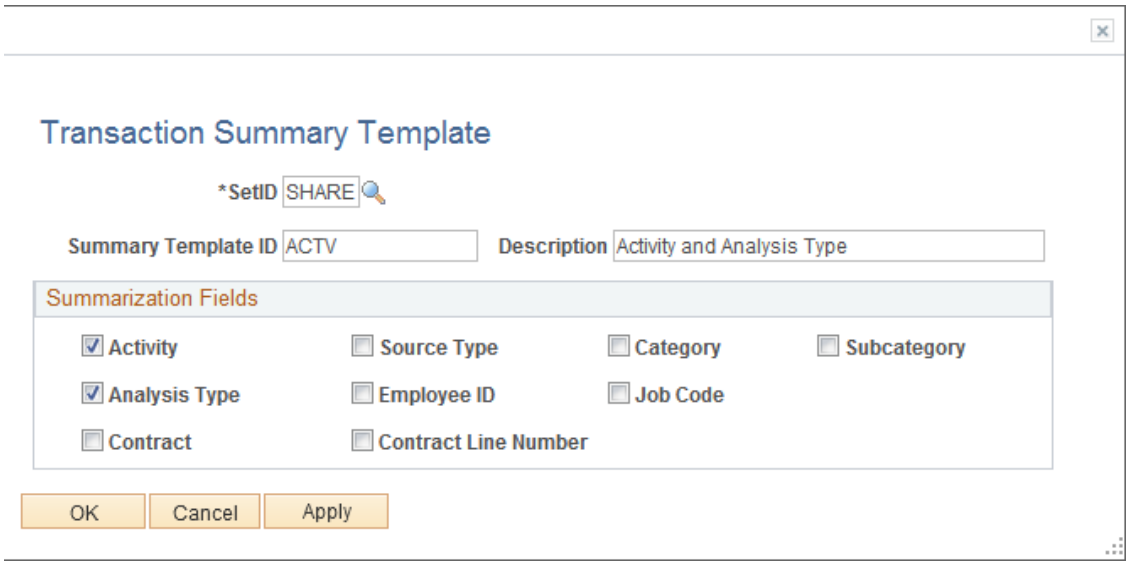
Transaction Summary Template Page

Use the Transaction Summary Template page (PC_PM_SUMM_TMPL) to select the fields by which transactions are summarized when they are displayed for project manager review.

Navigation:

Click the **Transaction Summary Template** link on the Manager Transaction Review page.

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



Select the fields that the system uses to summarize the transactions for project manager review if you use this template. You can select a transaction summary template as part of the search criteria on the Manager Transaction Review page.

You can select Contract and Contract Line Number as summarization fields to be displayed in the summary view along with other fields.

Reviewing and Adjusting Project Cost Transactions

Pages Used to Review and Adjust Project Cost Transactions

Page Name	Definition Name	Usage
Manager Transaction Review - Cost Review Page	PC_PM_SUMM_COST	Review detailed or summarized project cost transactions based on the settings in the **View Type** group box on the Manager Transaction Review page.

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Page Name	Definition Name	Usage
Target Transactions Review Page	PC_PM_TARGET	Review detailed project cost transaction information in a consolidated format.
Summary Details Review Page	PC_PM_SUMDTL	Review summarized project cost transactions.
Choose type of adjustment Page	PROJ_RES_ADJ_TYPE	Adjust the cost of a transaction during the review process.
Transaction Adjustment Page (new ChartFields)	PROJ_RES_ADJ_NEWCF	Select ChartFields for the new transaction row that is created during the adjustment process.
Transaction Adjustment Page (final)	PROJ_RES_ADJ_FINAL	Review and save the transaction adjustment.
Adjustments Page	PC_ADJ_ACCT_ASSGN1	Project accountants search for adjustment rows to review and assign GL-related ChartField values as required. To access this page, select **Project Costing**, and then **Accounting**, and then **Accounting Adjustments**
Assign ChartFields Page	PC_ADJ_ACCT_ASSGN2	Project accountants assign GL-related ChartField values to adjustment rows and determine if the adjustments will generate accounting entries to send to PeopleSoft General Ledger. To access this page, click **Assign ChartFields** on the Adjustments page.

Manager Transaction Review - Cost Review Page

Use the Manager Transaction Review - Cost Review page (PC_PM_SUMM_COST) to review detailed or summarized project cost transactions based on the settings in the View Type group box on the Manager Transaction Review page.

Navigation:

- **Project Costing**, and then **Interactive Reports**, and then **Manager Transaction Review**, and then **Cost Review**
- Enter search criteria and click **Search** on the Manager Transaction Review page.

This example illustrates the fields and controls on the Manager Transaction Review - Cost Review: General tab. You can find definitions for the fields and controls later on this page.

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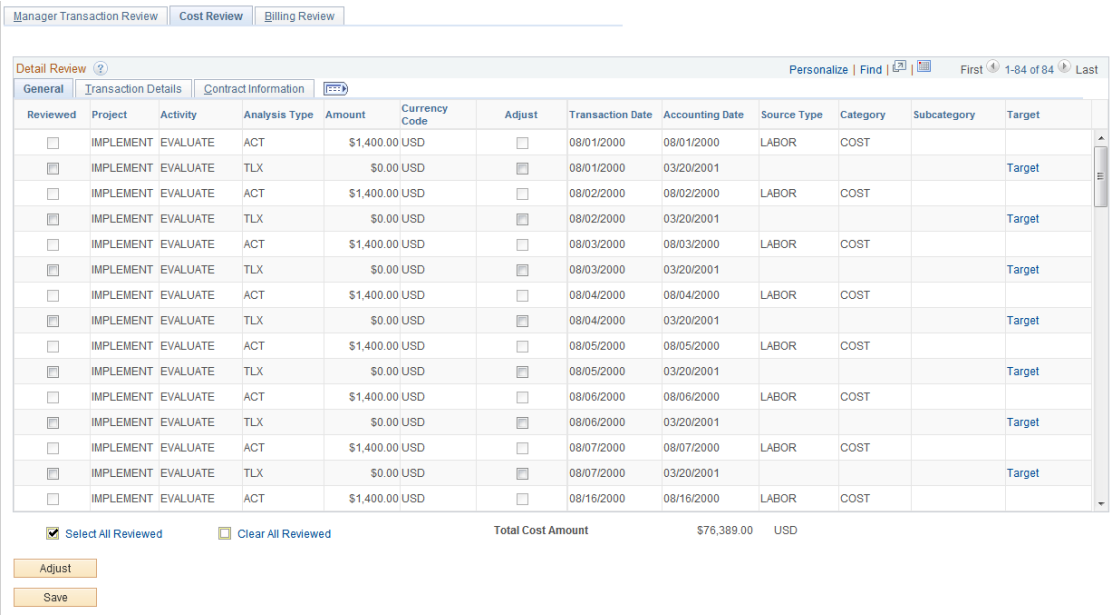

The system selects data for the Cost Review page by using the Manager Transaction Review - Cost analysis group (PMCST). If you select **Detail** in the **View Type** group box on the Manager Transaction Review page, transactions appear in the **Detail Review** grid on the Cost Review page in three views—**General, Transaction Detail,** and **Contract Information.**

General

Field or Control	Description
Reviewed	Project managers select this check box when they have reviewed the transaction. This field is not available for selection if any of the following situations exist: • The Billing Distribution Status field (BI_DISTRIB_STATUS) value for the row is *D* (distributed) or *W* (worksheet). • The GL Distribution Status field (GL_DISTRIB_STATUS) value for the row is *G* (generated) or *D* (distributed). • The system source is *PRP*, *PRB*, or *PRC*. If a project manager review is required prior to billing, project managers must select this check box for a transaction before you can bill the transaction.
Project, Transaction Date, and Accounting Date	View project ID and the respective transaction and accounting dates for a particular project transaction.

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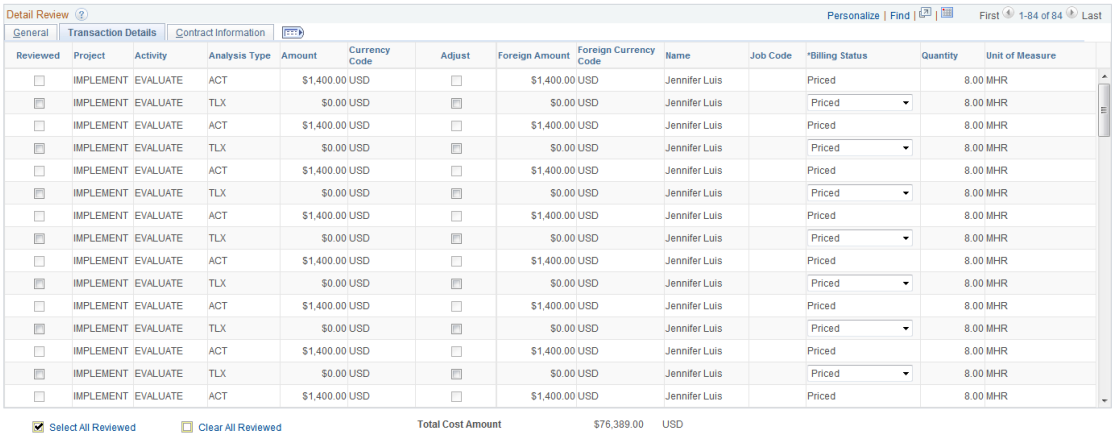
Field or Control	Description
Adjust	Select this option and click **Adjust** to access the **Choose type of adjustment** page and adjust the transaction. This field is not available for selection if any of the following situations exist: • The Billing Distribution Status field value for the row is *D* or *W*. • The GL Distribution Status field value for the row is *G* or *D*. • The Asset Management Distribution Status field value for the row is *D, V,* or *P*. • The system source is *PRP, PRB,* or *PRC*.
Target	Click to access the Target Transactions Review page, which contains the details of the actual project transaction as it is received from feeder systems. This field appears only if you select the **Detail** option in the **View Type** group box on the Manager Transaction Review page.
Details	Click to access the Summary Details Review page to review and adjust the details of summarized transactions. This field appears only if you select the **Summary** option in the **View Type** group box on the Manager Transaction Review page.

Manager Transaction Review - Cost Review: Transaction Details tab

Select the Transaction Details tab.

This example illustrates the fields and controls on the Cost Review page: Transaction Detail tab. You can find definitions for the fields and controls later on this page.



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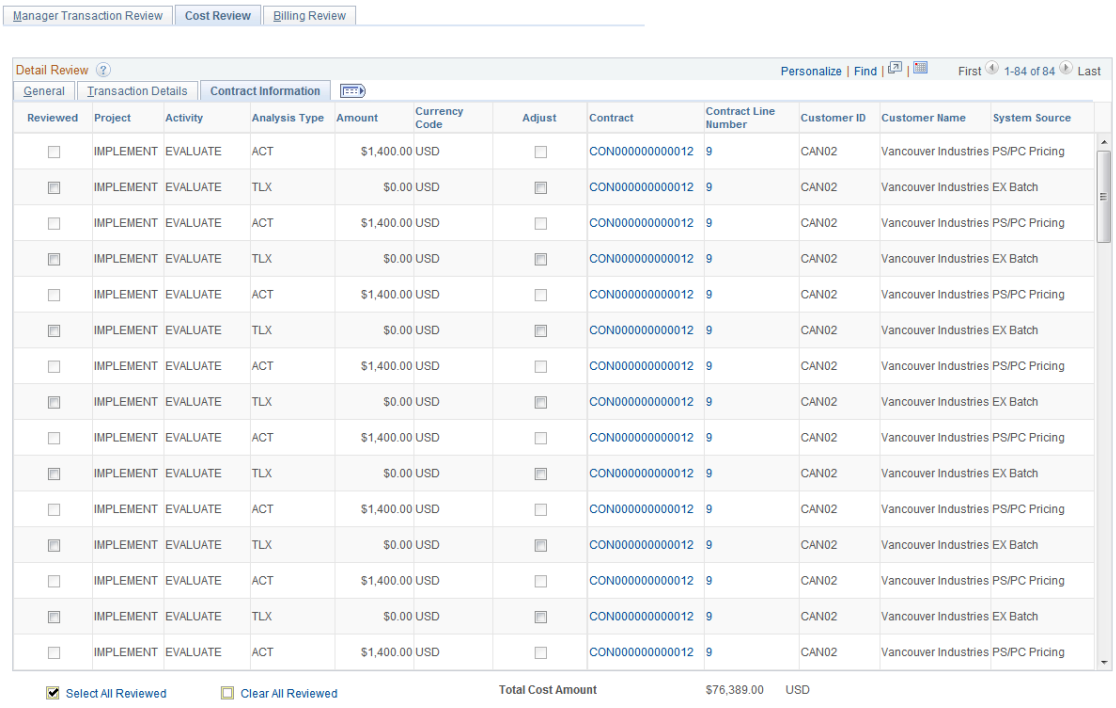
Field or Control	Description
Currency Code, Foreign Amount, and Foreign Currency Code	If you use PeopleSoft Project Costing in a multicurrency environment, each line reflects the original currency amount in the Foreign Amount field (FOREIGN_AMOUNT), and the converted currency in the Amount field (RESOURCE_AMOUNT). The converted currency is based on the currency code defined at the project business unit level.
Billing Status	Select a billing distribution status of *Billable* or *Nonbillable*. This field is not available for selection if any of the following situations exist: • The Billing Distribution Status field value for the row is *D* or *W*. • The GL Distribution Status field value for the row is *G* or *D*. • The system source is *PRP*, *PRB*, or *PRC*.

Manager Transaction Review - Cost Review: Contract Information tab

Select the Contract Information tab.

This example illustrates the fields and controls on the Manager Transaction Review - Cost Review: Contract Information tab.



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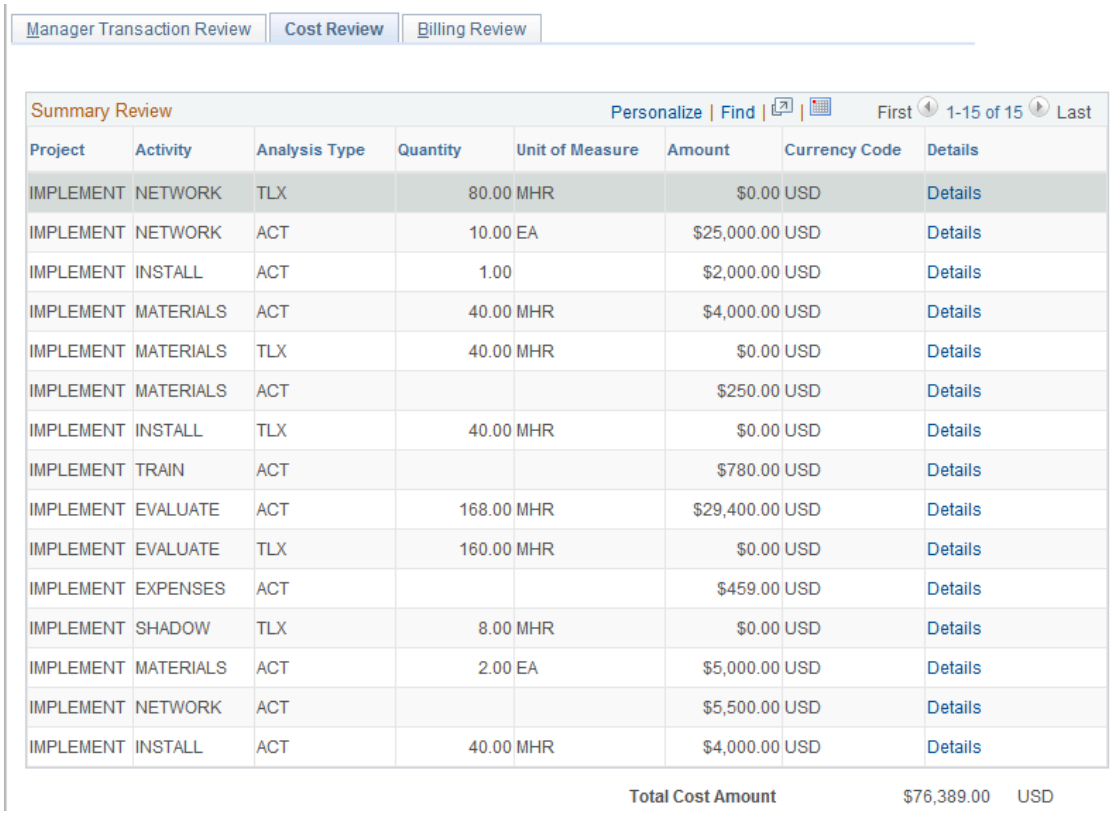
Field or Control	Description
Contract and Contract Line Number	View contract and contract line number for a particular project. Click on individual contract number or line to view or edit the respective contract details.

This page displays the analysis type, amount, and source for each activity. Contract information that is associated with each transaction appears on the page if you use the PeopleSoft Contracts application.

Manager Transaction Review - Cost Review: Summary Review grid

Summary transactions appear on the Manager Transaction Review - Cost Review: Summary Review grid.

This example illustrates the fields and controls on the Cost Review page: Summary Review grid. You can find definitions for the fields and controls later on this page.



Manager Transaction Review | Cost Review | Billing Review

Summary Review — Personalize | Find | First 1-15 of 15 Last

Project	Activity	Analysis Type	Quantity	Unit of Measure	Amount	Currency Code	Details
IMPLEMENT	NETWORK	TLX	80.00	MHR	$0.00	USD	Details
IMPLEMENT	NETWORK	ACT	10.00	EA	$25,000.00	USD	Details
IMPLEMENT	INSTALL	ACT	1.00		$2,000.00	USD	Details
IMPLEMENT	MATERIALS	ACT	40.00	MHR	$4,000.00	USD	Details
IMPLEMENT	MATERIALS	TLX	40.00	MHR	$0.00	USD	Details
IMPLEMENT	MATERIALS	ACT			$250.00	USD	Details
IMPLEMENT	INSTALL	TLX	40.00	MHR	$0.00	USD	Details
IMPLEMENT	TRAIN	ACT			$780.00	USD	Details
IMPLEMENT	EVALUATE	ACT	168.00	MHR	$29,400.00	USD	Details
IMPLEMENT	EVALUATE	TLX	160.00	MHR	$0.00	USD	Details
IMPLEMENT	EXPENSES	ACT			$459.00	USD	Details
IMPLEMENT	SHADOW	TLX	8.00	MHR	$0.00	USD	Details
IMPLEMENT	MATERIALS	ACT	2.00	EA	$5,000.00	USD	Details
IMPLEMENT	NETWORK	ACT			$5,500.00	USD	Details
IMPLEMENT	INSTALL	ACT	40.00	MHR	$4,000.00	USD	Details

Total Cost Amount $76,389.00 USD

Field or Control	Description
Contract and Contract Line Num	View contract and contract line number for a particular project. **Note:** These fields are displayed only if Contract and Contract Line Number check boxes are selected on the Transaction Summary Template Page.

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This page appears if you search for transactions by using the **Summary** option in the **View Type** group box on the Manager Transaction Review page.

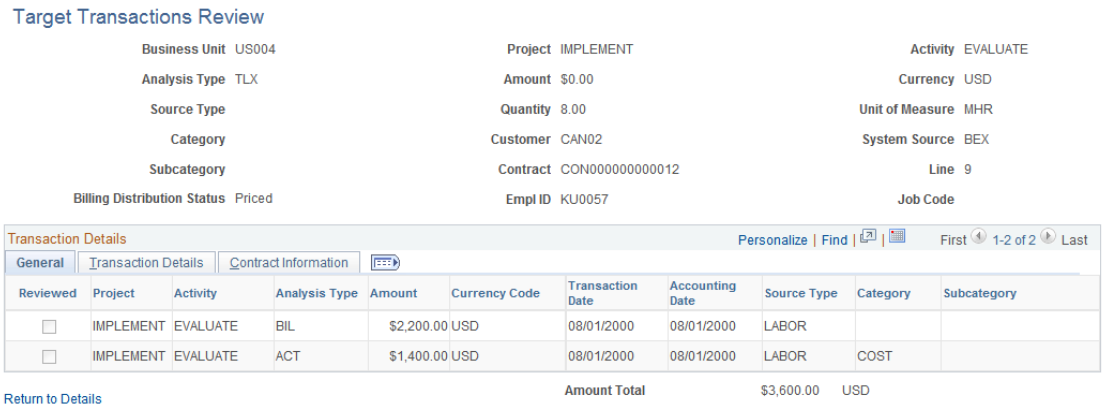
Target Transactions Review Page

Use the Target Transactions Review page (PC_PM_TARGET) to review detailed project cost transaction information in a consolidated format.

Navigation:

- Click the **Target** link on the Cost Review page **General** grid if you selected a **View Type** of **Detail** on the Manager Transaction Review page.
- Click the **Target** link on the Summary Details Review page.

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



Review detailed project cost transaction information in a consolidated format. This page is available only for detail transaction rows, and contains all transaction fields from the target transaction in a read-only format.

Summary Details Review Page

Use the Summary Details Review page (PC_PM_SUMDTL) to review summarized project cost transactions.

Navigation:

Click the **Details** link in the **Summary Review** grid on the Cost Review page if you selected a **View Type** of **Summary** on the Manager Transaction Review page.

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

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This page is available only for summary transaction rows. Project managers that search for transactions by using the **Summary** view type on the Manager Transaction Review page use this page to adjust individual transactions or mark them as reviewed.

Project managers that search for transactions by using the **Detail** view type on the Manager Transaction Review page use the Cost Review page to adjust individual transactions or mark them as reviewed.

You can select Deferred check box to process required transactions at a later date by updating the billing date. This check box is available only for billing and period of performance data.

In this page the Source and Target columns are displayed based on the navigation followed to access this page. If you access the Summary page from Cost Review then only the Target column is displayed. If you access it from Billing Review then only the Source column is displayed. If you access the page from Period of Performance Review then both the Source and Target columns are displayed.

Choose type of adjustment Page

Use the Choose type of adjustment page (PROJ_RES_ADJ_TYPE) to adjust the cost of a transaction during the review process.

Navigation:

- Select a transaction row in the **Adjust** column on the Cost Review page and click the **Adjust** button.
- Select a transaction row in the **Adjust** column on the Summary Details Review page and click the **Adjust** button.
- **Project Costing**, and then **Transaction Definitions**, and then **Transaction Adjustment**, and then **Transaction Adjustment**. Select a transaction row on the Transaction Adjustment page and click the **Next** button.

This example illustrates the fields and controls on the Choose type of adjustment page (from the Manager Transaction Review page). You can find definitions for the fields and controls later on this page.

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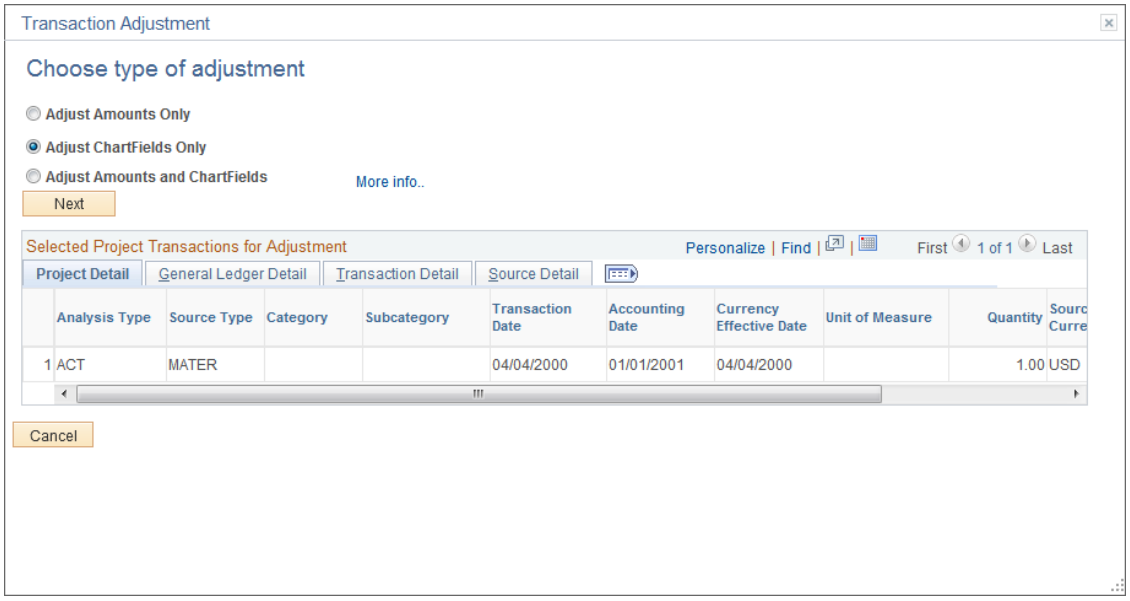

Transactions that you select for adjustment appear on this page. You can adjust only detail transactions with analysis types that belong to the Transaction Adjustment analysis group (ADJST). You cannot adjust summary transactions.

Field or Control	Description
Adjust Amounts Only	Select to modify only the quantity and amount for the selected transaction. The **New Value** group box appears for you to enter new quantity and amount values. The new amount must possess the same sign as the current amount, and must be less than or equal to the current amount. An error message appears if you enter either of these conditions. Click the **Next** button with this option to access the **Transaction Adjustment** page in read-only mode to view and finalize the transaction adjustment results. **Note:** This option is not available if you access this page from the Transaction Adjustment page.
Adjust ChartFields Only	Select to modify only project-related ChartField values for the selected transactions. By using this option you can adjust more than one transaction at a time. Adjustments apply to the entire quantity or amount. Click the **Next** button with this option to access the **Transaction Adjustment** page, where project managers can select new project-related ChartFields for the adjusted transaction line.

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Field or Control	Description
Adjust Amounts and ChartFields	Select to modify the quantity, amount, and project-related ChartField values for the selected transaction. The **New Value** group box appears for you to enter new quantity and amount values. **Note:** Changes in quantity are always in the same unit of measure as the original transaction, and changes in amount are always in the same currency as the original transaction. This option allows adjustments to one transaction row at a time and is only available when adjusting a single transaction. Click the **Next** button with this option to access the **Transaction Adjustment** page, where project managers can select new project-related ChartFields for the adjusted transaction line.
More info	Click to open the **More** group box and view information on adjustment types.
Next	Click to access the Transaction Adjustment page where the project manager can enter new transaction values and project-related ChartField values. If the adjustment type is *Adjust Amounts Only*, click this button to access the final Transaction Adjustments page in read-only mode to view and finalize the transaction adjustment.

Transaction Adjustment Page (new ChartFields)

Use the Transaction Adjustment page (PROJ_RES_ADJ_NEWCF) to select ChartFields for the new transaction row that is created during the adjustment process.

Navigation:

Click the **Next** button on the Choose type of adjustment page if you are adjusting project-related ChartFields.

This example illustrates the fields and controls on the Transaction Adjustment page: Entering adjustments. You can find definitions for the fields and controls later on this page.

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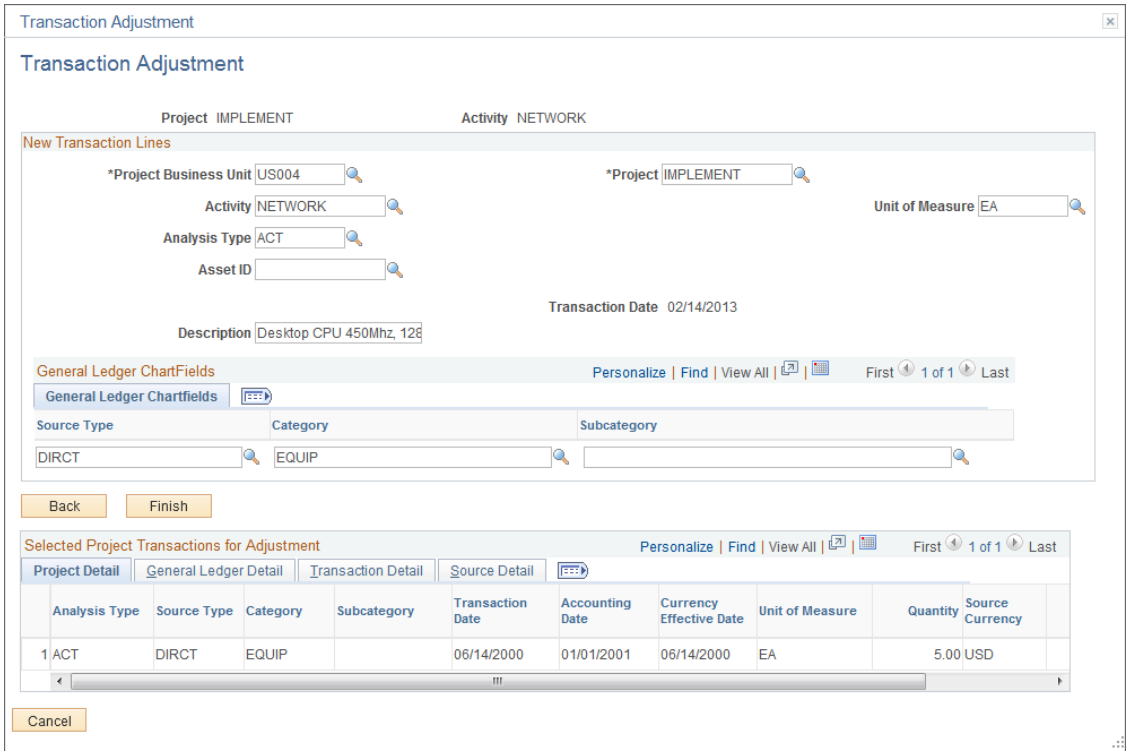

Project managers use this page to enter project-related ChartField values for the new transaction lines that are created when the transaction is adjusted.

If you are adjusting a single transaction, this page appears showing the ChartField values in the **New Transaction Lines** scroll area from the original transaction. Enter new values as required in the **New Transaction Lines** scroll area. Remove values to leave fields empty in the new transaction.

If you are adjusting multiple transactions, this page appears showing only the project business unit, project, activity, and other default values in the **New Transaction Lines** scroll area. Values that you enter in the **New Transaction Lines** scroll area apply to all transactions that appear in the **Selected Project Transactions for Adjustment** grid. Fields that you do not change on this page (fields that you leave blank) retain their original values in the adjusted transactions.

> **Note**
>
> To delete a ChartField value and leave the field empty on transaction rows, you must use the Transaction Adjustment page for a single transaction. For example, assume that the original transaction has a department value of 123 and product value of 789, and you want to change the department to A64 with no product value. You must select only this transaction to adjust, which enables you to delete the product value in the **New Transaction Lines** scroll area.

Field or Control	Description
Finish	Click to access the Transaction Adjustment page in read-only mode to view and finalize the transaction adjustment results.

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Field or Control	Description
Selected Project Transactions for Adjustment	Displays the transaction's original values.

When you click **Finish,** the final Transaction Adjustment review page appears in read-only format for you to review the changes. You can click the **Back** button to return to the Transaction Adjustment edit page and make further adjustments. The values that appear when you go back to the Transaction Adjustment edit page are based on the adjusted ChartField values. For example, assume that a transaction's original department value was 12000, and you adjust the value in the **New Transaction Lines** scroll area to 11000. After you click **Finish** to review the changes, if you click **Back** on the final Transaction Adjustment review page, the department value that appears on the Transaction Adjustment edit page is 11000.

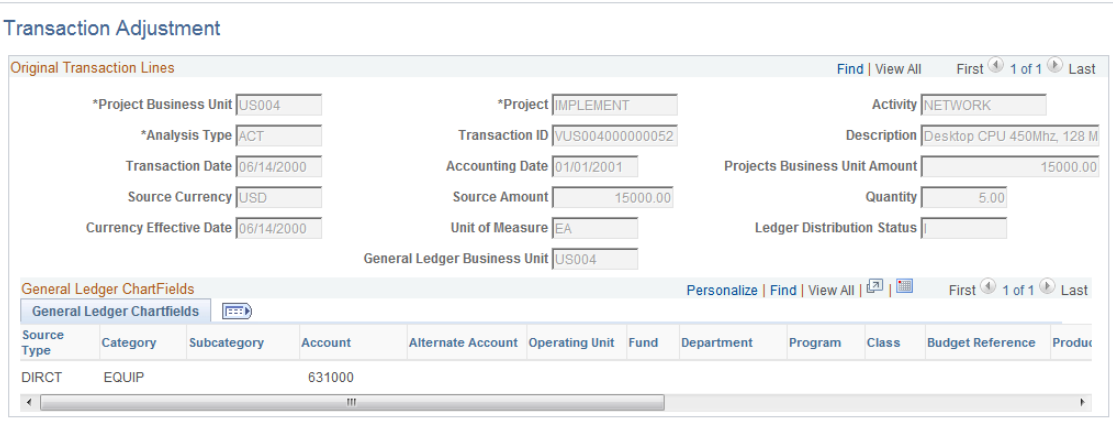
Transaction Adjustment Page (final)

Use the Transaction Adjustment page (PROJ_RES_ADJ_FINAL) to review and save the transaction adjustment.

Navigation:

- Click the **Next** button on the Choose type of adjustment page if you are adjusting transaction quantity and amount only.
- Click the **Finish** button on the Transaction Adjustment page if you are adjusting project-related ChartFields for a transaction.

This example illustrates the fields and controls on the Transaction Adjustment page: Original Transaction Lines group box. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Transaction Adjustment page: Offset Transaction Lines group box. You can find definitions for the fields and controls later on this page.

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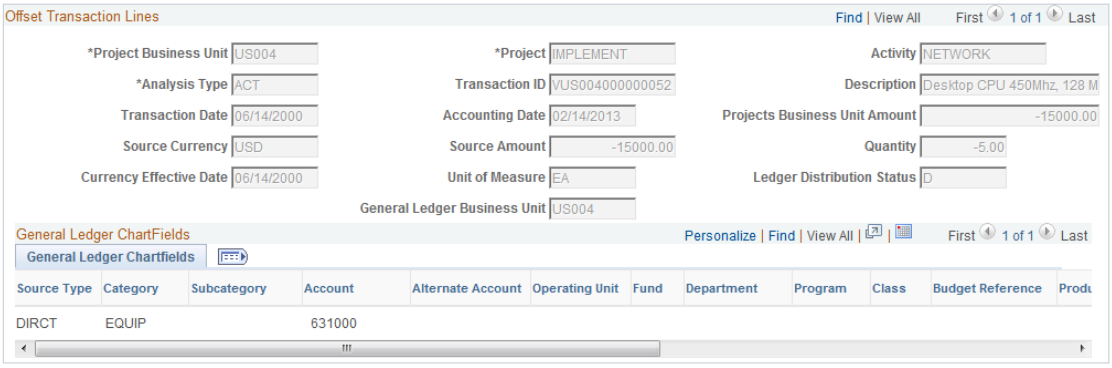
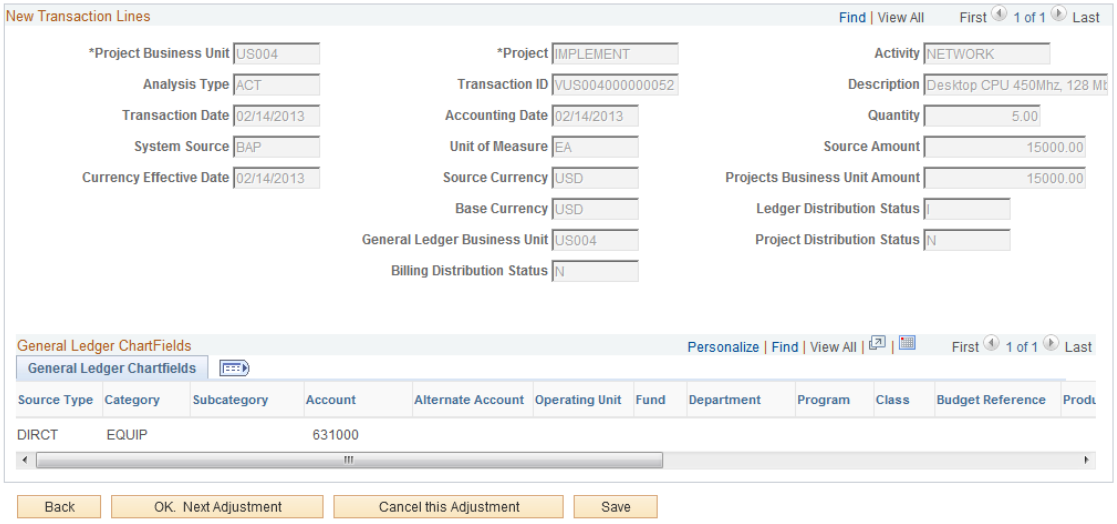


This example illustrates the fields and controls on the Transaction Adjustment page: New Transaction Lines group box. You can find definitions for the fields and controls later on this page.



Review the ChartField values for the original, offset, and new transaction lines that result when the adjustment occurs.

Field or Control	Description
Back	Click to return to the Transaction Adjustment page if the adjustment type is **Adjust ChartFields Only** or **Adjust Amounts and ChartFields.**
OK. Next Adjustment	Click to accept the changes and return to the Choose type of adjustment page to make another adjustment.
Cancel this Adjustment	Click to return to the Choose type of adjustment page where you can select a different adjustment type.
Save	Click to store the adjustment and make it eligible for Journal Generator processing.

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> **Note**
>
> The project accountant can use the Adjustments page, if required, to enter GL-related ChartField information and determine if the adjustment will be used to create GL journal entries.

Reviewing Project Billing Transactions

Pages Used to Review Project Billing Transactions

Page Name	Definition Name	Usage
Manager Transaction Review - Billing Review Page	PC_PM_SUMM_BILL	Review detailed or summarized project billing transactions.
Source Transactions Review Page	PC_PM_TARGET	View details of a source transaction in a consolidated format.

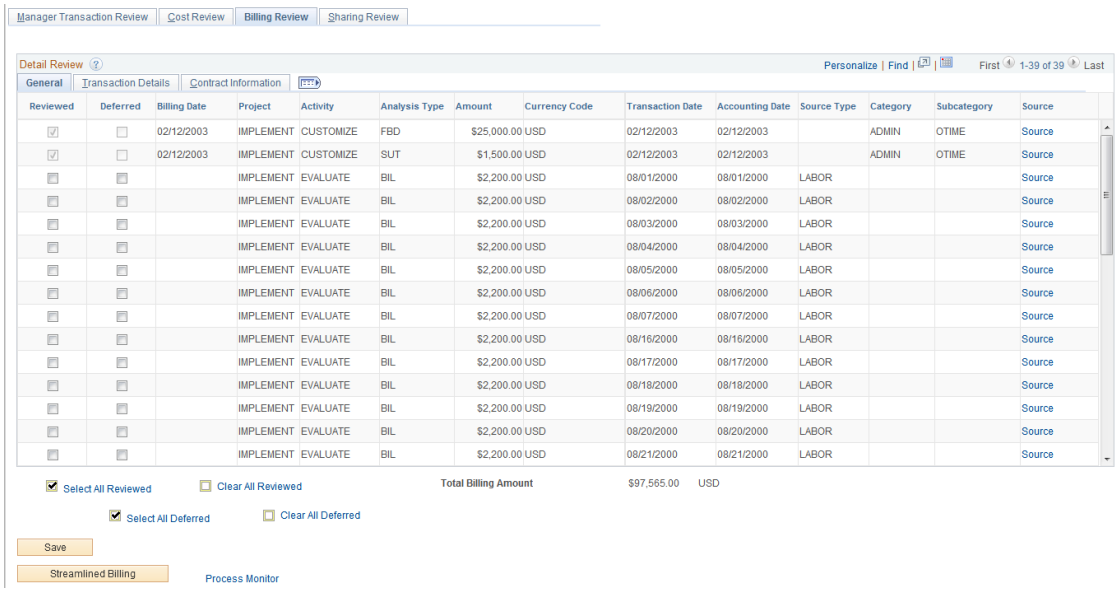
Manager Transaction Review - Billing Review Page

Use the Manager Transaction Review - Billing Review page (PC_PM_SUMM_BILL) to review detailed or summarized project billing transactions.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Manager Transaction Review**, and then **Billing Review**

This example illustrates the fields and controls on the Billing Review page: General tab. You can find definitions for the fields and controls later on this page.



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The system selects data for the Billing Review page by using the Manager Transaction Review - Billing analysis group (PMBIL). Transactions appear in the **Detail Review** grid on the Billing Review page in three views—**General,Transaction Detail,**and **Contract Information**.

Each view displays the **Reviewed, Deferred,Billing Date,Activity ID, Analysis Type,Transaction Date,** and**Accounting Date**fields, in addition to fields that are unique to each view.

Field or Control	Description
Reviewed	Displays a check mark to indicate that the project manager has reviewed the transaction. Selected transactions do not appear on future searches in the Project Manager Review component. If the **Review Required for Billing** option is activated, this field must be selected before the transaction can be billed. **Note:** A transaction can be included in revenue recognition before it has been reviewed and approved for billing by deselecting the *Review Required for Revenue* check box on the contract. In this scenario, the Reviewed selection on the Manager Transaction Review page is used as a review for billing, but not revenue recognition and can be edited even after revenue recognition has been processed. For more information on this see PeopleSoft Contracts: Contract - General Page
Deferred	Select to defer the processing of a particular project transaction for a later date. If the *Review Required for Revenue* check box is not selected on the contract, then this check box can be edited even if the transaction was processed for revenue.
Billing Date	Enter preferred date for billing when the transaction is deferred. **Note:** The Billing Date field is enabled only if Deferred check box is selected for a particular row.
Transaction Date and Accounting Date	View transaction and accounting dates for a particular project transaction.
Source	Click this link to access the Source Transactions Review page, which displays the details of the source transaction in a consolidated grid.
Select All Reviewed, Clear All Reviewed, Select All Deferred, and Clear All Deferred	Select or deselect all rows in the displayed data grid for processing.

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Field or Control	Description
Launch	Click this button to run the Contracts Billing processes using the Business Process Weaver (BPW). This button does not appear unless: • The business unit and the project ID fields are used to perform the search on the Manager Transaction Review page. • BPW is set up for the Contract Billing process. • The Project Costing entry point for BPW is active. For additional information about the Contracts process, see PeopleSoft Contracts: Running the Contracts Billing Interface Process. For additional information about the BPW, see Application Fundamentals: Understanding PeopleSoft Business Process Weaver.
Streamlined Billing	Click the **Streamlined Billing** button to create and schedule a run control for the Contracts Billing Interface Application Engine process (CA_BI_INTFC) in the PeopleSoft Process Scheduler. Depending on the bill plans, transaction processing may continue beyond the billing worksheet. See the section below about Streamlined Billing.

Streamlined Billing

The Streamlined Billing button only appears when you use the Business Unit and Project fields to perform your search.

Streamlined billing is a series of processes that execute according to settings that are in the PeopleSoft Contracts bill plans and are associated with project billing transactions. At a minimum, billable lines are sent to the billing worksheet and are available for pro forma creation. If bill plan settings allow all processes to execute, billable lines are processed all the way to create a finalized invoice.

Note the following important characteristics of streamlined billing:

- You must select the *Reviewed* option for a billable transaction to be eligible for streamlined billing.

  Transactions may need to be reviewed by a project manager using the Manager Transaction Review component so that they can be changes to a *Reviewed* status. Transactions can automatically be placed into a *Reviewed* status based on the **Review Required for Billing** option on the Installation Options - Project Costing Integration page and the **Auto Review for Billing** option at the project type and project level.
- Because each project can have multiple activities and each activity can be associated with a different contract line bill plan, streamlined billing can produce multiple invoices or worksheets.
- You must complete all billing transaction setup steps for streamlined billing to execute successfully.
- When you click the Streamlined Billing button, the process runs for the business unit and project that you entered on the Manager Transaction Review page.

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If you enter a business unit, project and contract on the Manager Transaction Review page, the process ignores the contract search criteria. Instead, it runs for all contracts associated with the project.

Related Topics

- PeopleSoft Contracts: Streamlined Billing

Source Transactions Review Page

Use the Source Transactions Review page (PC_PM_TARGET) to view details of a source transaction in a consolidated format.

Navigation:

Click the **Source** link on the Billing Review page.

The selected transaction appears at the top of the page and the cost transaction from which the billing row was created appears at the bottom. Only one source transaction appears on the page.

Reviewing Period of Performance Project Transactions

Pages Used to Review Period of Performance Project Transactions

Page Name	Definition Name	Usage
Period of Performance Review Page	PC_PM_REVIEW	Review detailed or summarized period of performance transactions.

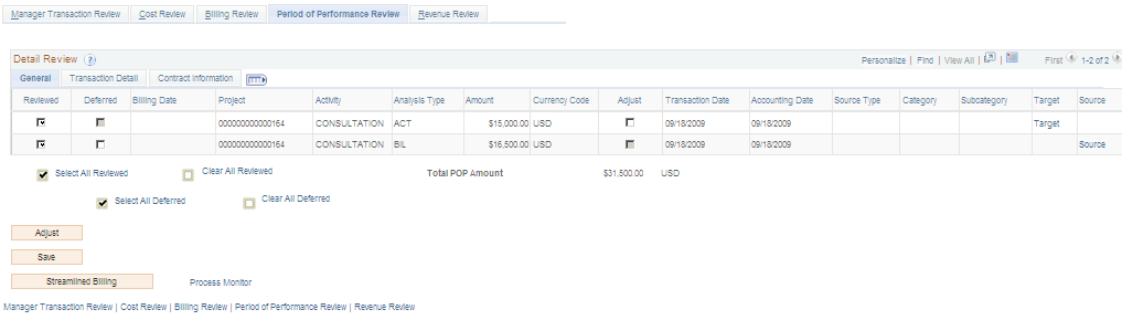
Period of Performance Review Page

Use the Period of Performance Review page to review period of performance project transactions.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Manager Transaction Review**, and then **Period of Performance Review**

This example illustrates the fields and controls on the Period of Performance Review Page. You can find definitions for the fields and controls later on this page.



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This page displays the transactions that do not fall in the period of performance start and end dates. The system selects data for the Period of Performance Review page by using the Manager Transaction Review - Period of Performance analysis group (PMPOP). You can review each exception in the page and approve it for processing. You can also defer the processing of required transactions for a later date. Both detailed and summary view is available for the transaction review. In this page all transactions are displayed as it combines the cost and billing data together for transactions outside the period of performance interval. Transactions appear in three views - General, Transaction Detail, and Contract Information.

Field or Control	Description
Adjust	Select required transactions for cost adjustment. Click the Adjust button after selecting transactions for adjustment to populate the source transaction. **Note:** Only transactions in Manager Transaction Review - Cost analysis group (PMCST) are eligible for adjustment.

Reviewing Shared Project Transactions

Pages Used to Review Shared Project Transactions

Page Name	Definition Name	Usage
Sharing Review: Transaction Detail Page	PC_PM_SUMM_SHAR	Review detailed or summarized project-sharing transactions.
Source Transactions Review Page	PC_PM_TARGET	View details of a source transaction for a shared cost row in a consolidated format. To access this page, click the **Source** link on the Sharing Review page.

Sharing Review: Transaction Detail Page

Use the Sharing Review: Transaction Detail page (PC_PM_SUMM_SHAR) to review detailed or summarized project-sharing transactions.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Manager Transaction Review**, and then **Sharing Review**

This example illustrates the fields and controls on the Sharing Review page: Transaction Detail tab. You can find definitions for the fields and controls later on this page.

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The system selects data for the Sharing Review page by using the Manager Transaction Review - Sharing analysis group (PMSHR). If you select **Detail** in the **View Type** group box on the Manager Transaction Review page, transactions appear in the **Detail Review** grid on the Sharing Review page in three views—**General, Transaction Detail,** and **Contract Information.**

Reviewing Revenue Transactions

Pages Used to Review Revenue Transactions

Page Name	Definition Name	Usage
Revenue Review Page	PC_PM_SUMM_REV	Review detailed or summarized revenue transactions.
Source Transactions Review Page	PC_PM_TARGET	View details of a source transaction for a revenue row in a consolidated format. To access this page, click the **Source** link on the Revenue Review page.

Revenue Review Page

Use the Revenue Review page (PC_PM_SUMM_REV) to review detailed or summarized revenue transactions.

Navigation:

Project Costing, and then **Interactive Reports**, and then **Manager Transaction Review**, and then **Revenue Review**

This page appears if there are rows for the project in the Project Transaction table with an analysis type that belongs to the Government Contracting System Revenue analysis group (PSRV2).

Transactions appear in the **Detail Review** grid on the Revenue Review page in three views—**General, Transaction Detail,** and **Contract Information.**

Each view displays the **Reviewed** check box and the **Activity ID, Analysis Type,** and **Amount** fields, in addition to fields that are unique to each view.

Click the **Source** link to access the Source Transactions Review page.

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26

Managing Assets

Understanding Asset Capitalization Processes

PeopleSoft Project Costing manages the transaction costs associated with assets from inception to cost value adjustment to retirement. Full lifecycle asset management provides detailed cost control, from defining the physical asset to placing it in service, maintaining it, and retiring it. You can create assets from project transactions by using either express capitalization or manual capitalization.

This topic discusses:

- Express capitalization.
- Manual capitalization.
- Asset integration rules.
- Currency summary options.
- Asset review and approval.
- Asset reversals.
- Work order-managed projects.
- Asset assignment to multiple projects.
- Transaction assignment to assets.
- Interunit asset transfers.

Express Capitalization

Express capitalization simplifies the process of creating assets by consolidating manual tasks. It is available only if you use PeopleSoft Asset Management.

To use express asset capitalization:

1. Set up filter criteria that specifies which transaction costs are eligible to make up the cost basis of the asset.
2. Set up capitalization rules in advance at the business unit level that default to new projects and activities as they are created.

   The rules specify such things as the timing of asset creation, the relationship of projects and activities to asset creation, and how to handle asset adjustments.
3. Use the Express Asset Definition pages to define assets and their attributes and to relate those assets to projects and activities.

   The specific express asset page that you will use is based on the rule that you use to identify the asset.
4. Run the Express Capitalization Application Engine process (PC_EXPRSS_AM) that uses the filter and rules that are set up in previous steps to create or adjust assets, assign

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transaction costs to assets, and send assets from PeopleSoft Project Costing to PeopleSoft Asset Management.

You can set up the process to require approval of summary data before you send it to PeopleSoft Asset Management.

> **Note**
>
> You can use the express capitalization functionality to summarize assets by asset, but not to summarize assets by profile.

Manual Capitalization

Use manual capitalization processes if asset integration requires manual intervention, or if you want to:

- Summarize transactions by profile.
- Process asset information at the book level.

To use manual asset capitalization:

1. Set up asset profiles.

   Asset profiles are templates that contain standard depreciation criteria for asset types and the corresponding asset books. Asset profiles are usually set up in PeopleSoft Asset Management, but they can also be created in PeopleSoft Project Costing if Asset Management is not installed.

   See Asset Profile Page.

2. Set up these asset integration rules on the Asset Integration Rules page for integrating with PeopleSoft Asset Management:

   - Select **Enable Integration** in the **Asset Integration Defaults** group box.
   - Select **Manual Identification** in the **Asset Identification Rule** group box.

3. Define assets in PeopleSoft Project Costing.

   If the actual asset that is produced by a project is not yet known, define the asset by using a temporary asset ID and an asset profile.

4. Relate the defined assets to the projects and activities that accumulate costs for the assets.

   Project transactions can be associated with a specific asset or, if the actual asset is not yet known, with an asset profile. Projects and activities can be related to the asset by project ID or asset ID.

5. Select and group (filter) transaction attributes into criteria that the system uses to identify transactions to assign to the asset or asset profile.

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> **Note**
>
> You set up filter criteria for the manual capitalization process on the Define Filter Criteria - Standard 1, Standard 2, and Custom pages. This differs from the filter criteria that you set up for the express capitalization process on the Express Asset Filter Criteria page.

6. Periodically run the capitalization process that summarizes project transactions based on asset or profile information, distributes the costs, and creates new assets in PeopleSoft Asset Management.

   You can set up the process to require approval of summary data before you send it to PeopleSoft Asset Management.

This diagram illustrates the process of manually capitalizing assets in classic interface and lists the related application pages that you use in PeopleSoft Project Costing. The arrows represent links to pages in the PeopleSoft Project Costing application:

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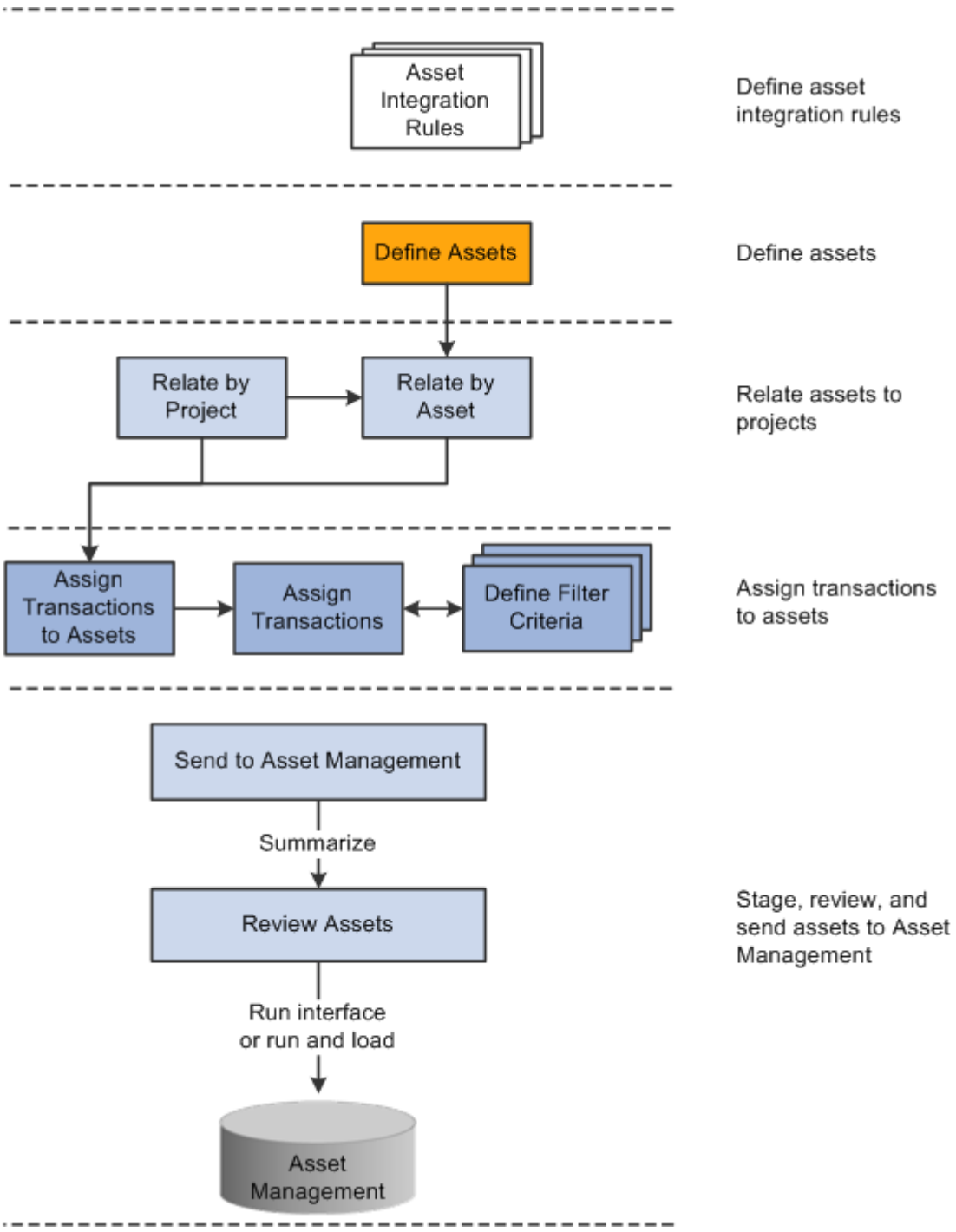

Book Processing

You can select the **Enable Book Processing** option on the Define Assets page to process asset information at the book level. With this option the system populates each book with default information from the book profile, such as salvage value, useful life, depreciation method, or depreciation convention. For example, by using book processing an asset valued at 10,000.00 USD on the corporate book may be value at only 9,000.00 USD on the tax book if a tax rule prevents you from capitalizing the difference.

As another example, assume that an asset is created from these transaction rows:

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Source Type	Amount
LABOR	3,000.00 USD
MATERIALS	2,000.00 USD
INTEREST	1,000.00 USD

In this example, the corporate book allows all three types of costs to be capitalized, but the tax book does not allow you to capitalize interest costs. To track this asset, set up two filter criteria—one called CORP_CRITERIA that includes all the rows, and another called TAX_CRITERIA that only includes LABOR and MATERIALS. Associate CORP_CRITERIA to the corporate book and TAX_CRITERIA to the tax book in the same manner that you perform the assign process for a nonbook asset.

When you associate the criteria with their respective books, processing for the asset occurs in the same manner as for a nonbook asset. Setting up filter criteria for each book and associating each criterion with its appropriate book results in sending a different value for each book to PeopleSoft Asset Management. You use Selection Criteria pages to define transactions for assignment to assets and to specify to which books each transaction is posted. If you post transactions to more than one book, the Assign Transactions to Assets page displays multiple rows (one for each book).

When you search for assets on the Review Assets page, you can limit the search results to assets that use the book processing functionality. The amount for the default book for each asset appears in the search result rows on the Integration Summary page.

See PeopleSoft Asset Management: Maintaining Asset Book Information.

> **Note**
>
> Book Processing is not available in the fluid **Assign Cost to Asset** component.

Asset Integration Rules

The asset integration rules that you establish at the business unit level appear as default values when you create projects. You can override the default asset integration rules at the project level. Activities inherit asset integration rules from the project level. Some of these rules are not available to change at the activity level based on the project-level option that you select to distribute project costs to assets.

Asset integration rules consist of:

- Asset integration defaults which consist of an option to enable integration with PeopleSoft Asset Management, the integration type (capitalization or retirement), and the filter that identifies the rows from the Project Transaction table (PROJ_RESOURCE) that are eligible for retirement or capitalization.
- Rules that specify how to identify an asset.

  For example, you can instruct the system to create only one asset for each activity, or one asset from many activities, and so on.
- Timing triggers that specify when to create an asset.

  For example, you can specify that asset processing can create a new asset when a project status is approved, or an activity is 95 percent complete, and so on.

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- The asset location source that indicates if the asset integration process uses the asset definition's location code or the activity definition's location code to determine the asset's location.
- Rules that specify the destination of the asset rows that result from the capitalization processes.

  For example, you can choose to: Summarize asset transaction rows in the PC to AM (Project Costing to Asset Management) Staging table (PROJ_AM), but not send the rows to the PeopleSoft Asset Management Loader tables (INTFC_FIN and INTFC_PHY_A). If you do not require asset approval prior to sending assets to PeopleSoft Asset Management, you can:

  – Summarize asset transaction rows in the PC to AM Staging table and send them to the PeopleSoft Asset Management Loader tables, but not send the rows to the PeopleSoft Asset Management transaction tables.

  – Summarize asset transaction rows in the PC to AM Staging table, send them to the PeopleSoft Asset Management Loader tables, and send the rows to the PeopleSoft Asset Management transaction tables. This option is available if you do not require asset approval prior to sending assets to PeopleSoft Asset Management.
- Rules that specify how to adjust assets.

Inherit Asset Integration Rules from Programs

You can set up a project to inherit its asset integration rules from a program instead of from the business unit by entering the program name on the Asset Integration Rules page for a project. Use this functionality if there is a summary project or program that contains child projects, each of which need to contribute transaction costs to the same asset.

When you use the program asset integration rules for a project that belongs to the program, the system:

- Overrides all of the rules on the project to match the specified program.
- Overrides all of the rules for activities that are already associated with the project to match the parent project.
- Disables all of the integration rules, except for the rules in the **Asset Integration Defaults** group box on the Asset Integration Rules page.

  The disabled fields are available for editing again if you deselect the **Inherit from Program** field and save the page.
- Prevents a change to the identification option if assets are related to the project.

When you change the asset integration rules at the program level, the system also changes the corresponding project and activity rules to keep the rules synchronized across all projects that contribute to an asset.

End-of-Year Rule

The Express Capitalization process triggers end-of-year processing. You can select one of these options that determines how the system treats asset adjustments at the end of the fiscal year:

- Ignore end of year: The system creates asset adjustments as if there is no designated end of year.
- Create parent/child assets: The system creates new assets that are children to the original (now parent) assets if adjustments are sent from the project after the specified end of the year. All adjustments belong to the child assets.

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- Create new asset: The system creates new assets if adjustments are sent after the specified end of the year. All adjustments belong to new assets instead of child assets.
- Stop sending adjustments: The system does not send adjustments to PeopleSoft Asset Management after the specified end of year.

The system assigns the next available asset ID automatically when it creates a new asset during end-of-year processing. In this situation you cannot manually assign the asset ID.

The in-service date of an asset is used as the reference point to determine the end of a year. So, an asset in-service date of December 1, 2005, a last month of year of December, and a last day of year of 31, allows only one month before the end-of-year treatment occurs after December 31, 2005. An asset with an in-service date of January 1, 2006, however, has one year until the end-of-year treatment occurs after December 31, 2006.

The following table provides examples of how adjustments are treated for all four end-of-year rules. Assume in these examples that you use a 5-4-4 quarter and the current fiscal year ends on April 2, 2005:

Scenario	Ignore End of Year	Create Parent/ Child Assets	Create New Asset	Stop Sending Adjustments
Project Asset 1 created and sent to PeopleSoft Asset Management with an in-service date of February 24, 2005. The cost of the asset is 10,000.00 USD.	No adjustment is made at this time	No adjustment is made at this time	No adjustment is made at this time	No adjustment is made at this time
An adjustment of 2,000.00 USD is made to asset. The run date of the PC_EXPRSS_AM process is April 1, 2005.	2,000.00 USD is added to Asset 1	2,000.00 USD is added to Asset 1	2,000.00 USD is added to Asset 1	2,000.00 USD is added to Asset 1
An adjustment of 1,500.00 USD is made to asset. The run date of the PC_EXPRSS_AM process is April 16, 2005.	1,500.00 USD is added to Asset 1	New child asset with a cost of 1,500.00 USD is created with Asset 1 as its parent	New asset with a cost of 1,500.00 USD is created and does not have Asset 1 as its parent	No adjustment is sent to PeopleSoft Asset Management

Currency Summary Options

PeopleSoft Project Costing capitalization processes evaluate transaction currency when summarizing project transaction costs. During installation you can choose the level of currency detail to send to PeopleSoft Asset Management when you capitalize assets.

In a multicurrency environment, where the currency may vary between the transaction, the project, and the Asset Management book, you may want to retain the currency transaction details in PeopleSoft Asset Management. Use the multiple currency summarization option if you want the capitalization processes to summarize down to the five currency fields—Transaction Currency Code, Currency Effective Date, Rate Multiplier, Rate Divisor, and Rate Type.

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Alternatively, in a single currency environment, you have no need to maintain transaction currency detail in PeopleSoft Asset Management. You can select the single currency summarization installation option for the system to ignore the five currency fields and achieve a greater level of summarization.

Example of a Multiple Currency Environment

Assume that many transactions exist for a project in January 2007. Among the transactions there are two different transaction currency codes and two different currency effective dates. In this example the transactions have the same rate multiplier, rate divisor, and rate type. In a multicurrency environment, PeopleSoft Project Costing summarizes down to the detail currency level and sends three transactions to PeopleSoft Asset Management, as shown in this table:

Transaction Amount	Transaction Currency Code	Currency Effective Date
100	FRF	January 1, 2007
100	FRF	January 15, 2007
100	YEN	January 15, 2007

Example of a Single Currency Environment

Assume that these three transactions exist for a project in January 2007:

Transaction Amount	Transaction Currency Code	Project Amount	Project Currency Code	Currency Effective Date
50	USD	50	USD	January 1, 2007
60	USD	60	USD	January 15, 2007
140	USD	140	USD	January 31, 2007

In a single currency environment, PeopleSoft Project Costing sends one summarized transaction in the amount of 250 USD to PeopleSoft Asset Management, as shown in this table:

Transaction Amount	Transaction Currency Code	Currency Effective Date
250	USD	January 31, 2007

Related Topics

- Application Fundamentals: Installation Options - Project Costing Integration Page

Asset Review and Approval

This diagram illustrates the capitalization processes of summarizing costs, sending data to the PC to AM Staging table, sending data to PeopleSoft Asset Management loader tables, and loading the transactions into PeopleSoft Asset Management production tables:

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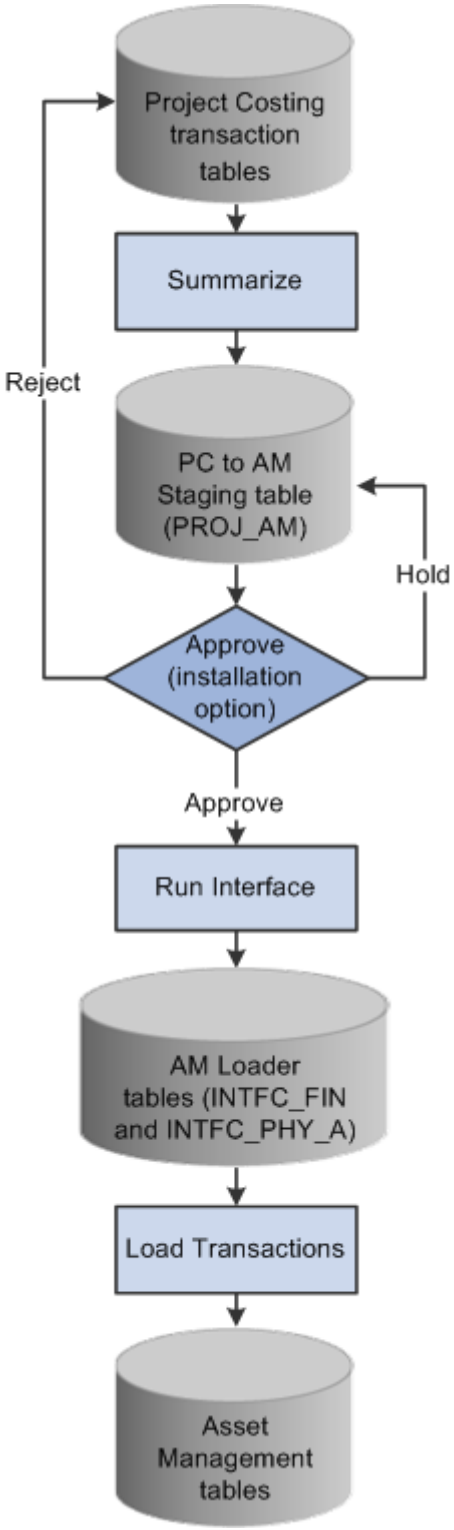

Prior to sending data to PeopleSoft Asset Management, you can review the summarized costs of assets and perform these actions:

- Review and approve asset transactions that are in the PC to AM Staging table before sending them to PeopleSoft Asset Management Loader tables.

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- Reject asset transactions that are in the PC to AM Staging table before sending them to PeopleSoft Asset Management Loader tables.
- Proceed with the capitalization process with no changes.

During installation you can select **Require Asset Approval** in the **Asset Management Integration** group box on the Installation Options - Project Costing Integration page to require approval of asset transactions before they are sent to the PeopleSoft Asset Management Loader tables.

Asset Reversals

You can reverse transaction rows that were incorrectly distributed to PeopleSoft Asset Management if the transactions are associated with projects that have an active processing status. For example, assume that cost data is sent to PeopleSoft Asset Management, after which you realize that an incorrect amount was used to capitalize the asset. The high level steps to reverse transaction rows are:

1. Access the Review Assets page, search for the erroneous asset, and determine which summarized row contains the incorrect amount.
2. Select the **Reverse** option on the Integration Summary page and run the process to send the reversal to PeopleSoft Asset Management.

You can view rows that are already distributed to PeopleSoft Asset Management in both summary and detail format, and reverse transactions as necessary. Reversing a row does not roll back to the original transaction, as doing so would not maintain an accurate audit trail. Instead, a reversal results in the creation of two additional rows—the reversing transaction that is sent to PeopleSoft Asset Management and a new, undistributed transaction in PeopleSoft Project Costing.

You cannot reverse asset transactions for projects with an inactive processing status. For this reason, on the Review Assets - Integration Summary page you can only view asset transactions for projects that are currently inactive. You cannot select or modify the review status of transactions for inactive projects. If an asset is associated with multiple projects and some of those projects are inactive, the rows that appear on the Review Assets - Integration Summary page are disabled (read-only) for the inactive projects and enabled for the active projects.

You cannot reverse temporary assets that have already been replaced by permanent assets. In other words, if you create temporary assets in PeopleSoft Asset Management by using the Summarize by Profile feature in PeopleSoft Project Costing, and subsequently create permanent assets by using the Summarize by Asset feature, you can no longer reverse the temporary assets.

Work Order-Managed Projects

PeopleSoft uses work orders to track the costs associated with maintaining or creating assets. In PeopleSoft Maintenance Management, a work order consists of one or more work order tasks. Each task specifies the asset that is being maintained and a related project and activity, and contains the transaction costs of performing asset maintenance. The transaction costs flow from PeopleSoft Maintenance Management into various PeopleSoft applications such as PeopleSoft Time and Expense, Inventory, and Payables, and from these systems into PeopleSoft Project Costing.

If you use PeopleSoft Maintenance Management, you can designate projects as *work order-managed.* Work order-managed projects is a term that refers to projects that are managed with work orders in PeopleSoft Maintenance Management, instead of by a project manager in PeopleSoft Project Costing. You can use work order-managed projects to capitalize, adjust, or

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retire assets in PeopleSoft Asset Management. For example, you can use a work order-managed project to track several unrelated maintenance tasks for an asset, or to track the cost of constructing an asset.

This is an example of a process flow for a work order-managed project that is used to track the cost of constructing an asset:

1. Plan and budget for construction of an asset.
2. Obtain approval for the construction.
3. Create a project plan and work orders to construct the asset.
4. Complete the work orders.
5. Capture the costs—labor, materials, and depreciation—that are associated with the effort.
6. Capitalize the project costs.

A work order task can specify only one asset, one project, and one activity. For work order-managed projects:

- You can create multiple assets from a single project.
- You can maintain a single asset from multiple projects.

The PeopleSoft Maintenance Management system creates assets from work order tasks and relates the assets to projects and activities. You can use the Define Assets and Relate by Project pages to view the details of asset definitions and the relationship of assets to projects for assets that are associated with work order-managed projects.

The system automatically updates certain fields on the Asset Integration Rules page during the life of a work order-managed project, such as:

- When you save a project as a work order-managed project, the system automatically selects the asset identification rule of **Derive from Work Order Task** and the adjustment trigger of **Automatic.**

  When **Derive from Work Order Task** is selected, the Express Retirement (PC_EXPRET_AM) or Express Capitalization processes begin with the closure of a work order task.
- When you change a work order task status to complete, the system updates the filter ID (filter identifier) and integration type at the activity level to reflect the criteria in PeopleSoft Maintenance Management.

Related Topics

- Understanding Integration with PeopleSoft Maintenance Management
  PeopleSoft Maintenance Management is a PeopleSoft Asset Lifecycle Management solution that gives you the tools to plan and schedule maintenance and construction, facilitate the accurate completion of the work, streamline the capture of the results, and automatically process the financial implications of the work. PeopleSoft uses work orders in PeopleSoft Maintenance Management to track the costs associated with maintaining or creating assets.
- Understanding Work Order Transaction Processing
  This topic discusses:
- Understanding Work Order Asset Capitalization and Retirement
  This topic lists prerequisites and discusses:
- Understanding Integration Setup
  You use pages in both PeopleSoft Maintenance Management and PeopleSoft Project Costing to set up the integration between these systems. This table lists the integration

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setup steps, the application pages used to accomplish the steps, and the applications that own the pages:

- Setting Up Rate Sets and Asset Integration Rules
  You use pages in PeopleSoft Maintenance Management and PeopleSoft Project Costing to set up the integration. This topic discusses the setup pages that are in PeopleSoft Project Costing only.
- Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing
- Pricing Work Order Costs

Asset Assignment To Multiple Projects

You can associate the same asset with multiple projects if any of these conditions exist:

- The projects are work order-managed.
- Asset integration is disabled on all but one of the projects.
- The projects belong to the same program, and the asset is not associated with projects that are asset integration enabled on a different program.

Use the assign assets to multiple projects functionality when:

- A summary project or program contains child projects that contribute transaction costs to the same asset.
- A project is complete and the related asset is capitalized, and later additional costs are accumulated for the same asset in a new project.

  You must disable integration on the project where the asset integration was previously completed.
- Multiple work order-managed projects are set up to accumulate costs for the same asset over time or simultaneously.

Transaction Assignment to Assets

Use the Assign Cost to Asset fluid page (or Assign Transactions to Assets classic page) to assign transactions to assets for projects that have an asset identification rule of **Manual Identification** on the Asset Integration Rules page. You can also view transactions that are eligible for asset assignment.

The purpose of assigning transactions to assets is to specify the transaction costs to include in the cost basis of the asset that is created. The assign process stamps the asset management business unit, profile ID, and asset ID on the transaction row in the Project Transaction table. Alternatively, you can enter the asset management business unit, profile ID, and asset ID on the transaction row by performing one of the following functions:

- Manually assigning transactions by using the Transaction Detail page.
- Using the allocation process.
- Using a system that feeds into PeopleSoft Project Costing.

  Under certain circumstances you can add asset information into the feeder system; thus, transaction rows may already have these values populated. If this is the case, you do not have to reenter the asset information in PeopleSoft Project Costing.

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Interunit Asset Transfers

In PeopleSoft Asset Management you can interunit transfer an asset from one business unit to create another asset in a different business unit. The transfer is recognized by the PeopleSoft Project Costing system if you subsequently try to adjust or retire the original asset in PeopleSoft Project Costing. In this situation the system detects the transfer, adds the new asset to PeopleSoft Project Costing, modifies the project to point to the new asset, and processes the adjustment or retirement on the new asset. The original asset is no longer available for you to adjust, retire, or relate it to a project.

For example, assume that Asset 1 was created from PeopleSoft Project Costing and sent to PeopleSoft Asset Management as Asset 1. Then Asset 1 was interunit transferred to create Asset 2. If you enter an adjustment for Asset 1 in PeopleSoft Project Costing, the system adds Asset 2 to Project Costing tables and applies the adjustment to Asset 2. In this example, you can no longer select Asset 1 to adjust or retire, and Asset 2 is eligible for asset capitalization and retirement processes.

Understanding Asset Retirement

This topic discusses:

- Manual asset retirement.
- Asset retirement for work order-managed project activities.
- Proceeds from sale and cost of removal.

Manual Asset Retirement

Asset retirement is a method of indicating that an asset is being removed from service. There are two kinds of retirement—partial and full. In partial retirement only a certain portion of the asset is retired. In full retirement the full value of the asset is retired. You can partially or fully retire assets that are managed in PeopleSoft Project Costing by using the Asset Retirement Integration Application Engine process (PC_RETIRE_AM).

Project Costing-managed project is a term that refers to a project that is managed by a project manager in PeopleSoft Project Costing, instead of with work orders in PeopleSoft Maintenance Management. You must use the manual asset retirement process to retire assets if PeopleSoft Maintenance Management is installed and the project is a Project Costing-managed project. You must also use the manual asset retirement process to retire assets if PeopleSoft Maintenance Management is not installed.

Retirement Process Flow - Project Costing-Managed Project Activities

The process flow for retiring assets for Project Costing-managed project activities is:

1. Create a retirement project

   On the Asset Integration Rules page, select the **Enable Integration** option and an integration type of Retirement.

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> **Note**
>
> If a project has a retirement integration type, then all of the project's activities must also have a retirement integration type.
>
> You must select the **Manual Identification** option on the Asset Integration Rules page for projects and activities to be eligible for asset retirement.

2. Accumulate transaction costs.

   Transactions with analysis types in the PC to AM Cost of Removal (AMCOR) and AM Proceeds from Sale (AMPFS) analysis groups are eligible for processing to PeopleSoft Asset Management.

3. Assign transactions to assets.

   Use the Assign Transactions to Assets page for projects that have an asset identification rule of **Manual Identification** on the Asset Integration Rules page.

4. Use the Asset Retirement page to run the Asset Retirement Integration process to:

   - Send the asset cost value, cost of removal, and proceeds from sale, to PeopleSoft Asset Management.
   - Update the AM Distribution Status field (AM_DISTRIB_STATUS) to *D* (distributed) in the Project Transaction table, indicating the transaction rows have been distributed to PeopleSoft Asset Management and cannot be updated in the Project Transaction table.

> **Note**
>
> The Asset Retirement Integration process does not use the PC to AM Staging table. The transactions go directly to the PeopleSoft Asset Management Loader tables.

Asset Retirement for Work Order-Managed Project Activities

You can use the Express Retirement process to fully retire assets that are associated with work order-managed projects. You cannot partially retire assets that are associated with work orders.

For project assets to be eligible for the Express Retirement process, you must:

- Select the **Work Order Managed Project** option for the project, and change the project processing status to *Active,* on the Project Definition - General Information page.
- Establish express asset filter criteria for the business unit on the Express Asset Filter Criteria page.
- Select **Derive from Work Order Task** for the project in the **Asset Identification** group box on the Asset Integration Rules page.
- Accumulate costs in PeopleSoft Project Costing directly (using online transaction entry in Project Costing) or indirectly (from feeder systems such as PeopleSoft Payables, Expenses, and Inventory).

You can retire an asset only once. If the same asset is assigned to multiple work order tasks, the Work Order Close Application Engine process (WM_CLOSE) restricts the system from processing two retirements for the same asset.

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Retirement Process Flow - Work Order-Managed Projects

The process flow for retiring assets for work order-managed project activities is:

1. Close the work order task.

   PeopleSoft Maintenance Management determines if the asset that is associated with the work order task is already retired, or if it is tagged for retirement in the Asset Management Loader table (INTFC_FIN). If either of these conditions exist, the Work Order Close process will not proceed for this work order task.

   Alternatively, you can retire the asset using the Asset Retirement Integration process.

2. PeopleSoft Maintenance Management updates these values for the project activity in the **Asset Integration Defaults** group box on the Asset Integration Rules page:
   - Selects the **Enable Integration** flag.
   - Selects an integration type of *Retirement.*
   - Enters a value for filter ID.
3. The work order closed status triggers the Express Retirement process and indicates to the system that the project activity is ready to process.
4. The Express Retirement process:
   a. Determines the assets, which are associated with work order-managed project activities in the Project Transaction table, to send to PeopleSoft Asset Management based on defined rules and criteria.
   b. Stamps Project Transaction table rows (cost of removal or proceeds from sale) with asset information.
   c. Calls the Asset Retirement Integration process.

You can submit an asset for retirement only once if you use the Express Retirement process. For example, assume that two work order tasks are associated with the same asset. When you close just one of the work order tasks, the Work Order Close process triggers the Express Retirement process to retire the asset.

Alternatively, you can enter adjustments directly in PeopleSoft Asset Management for assets that are distributed from PeopleSoft Project Costing to Asset Management.

Expenses

Expenses that are booked against work order-related projects interface with PeopleSoft Project Costing; however, PeopleSoft Expenses does not maintain work order-related fields. These transactions are not included in the Express Asset Retirement Integration process unless you manually update the transactions in PeopleSoft Project Costing with the work order-related fields.

You can, however, include expenses transactions in asset retirement for projects that are actively managed in PeopleSoft Project Costing.

Related Topics

- Understanding Work Order Asset Capitalization and Retirement
  This topic lists prerequisites and discusses:
- Retiring Work Order Assets

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Proceeds from Sale and Cost of Removal

By using the Asset Retirement Integration process you can send the cost of removing an asset or the proceeds from selling an asset to PeopleSoft Asset Management at the time that you retire the asset, or after you retire the asset. Transactions are eligible for the retirement process if they are assigned to the asset on the Assign Transactions to Assets page, and the analysis type belongs to the PC to AM Cost of Removal (AMCOR) or AM Proceeds from Sale (AMPFS) analysis groups. Transactions with analysis types in the AMCOR analysis group post to PeopleSoft Asset Management as a transaction removal cost. Transactions with analysis types in the AMPFS analysis group post to PeopleSoft Asset Management as proceeds from sale.

To send costs for removing an asset or the proceeds from selling an asset to PeopleSoft Asset Management, assign transactions to the asset and use the Asset Retirement page to retire the asset. The asset's quantity and retirement quantity determine what proportion of the asset's cost is calculated as the retirement amount. For example, assume that the asset's quantity is *2* and you enter a value of *1* as the retirement quantity on the Asset Retirement page. The retirement quantity is 50 percent of the asset quantity, and the system uses this percentage to calculate the asset's retirement amount. If the cost is *500.00,* the retirement amount is calculated as 50 percent of 500.00, which is *250.00.* These calculations appear in the following table:

Quantity	Retirement Quantity	Percentage	Cost	Retirement Amount
2	1	50%	500.00	250.00

You can also send the cost of removing an asset and the proceeds from selling an asset to PeopleSoft Asset Management after the asset is retired from PeopleSoft Project Costing. For example, assume that on January 1 you retire Asset 123 from PeopleSoft Project Costing with a cost value of 2,240.00, cost of removal of 5,435.00, and proceeds from sale of 1500.00. On January 2 through 6, transaction costs that are eligible for cost of removal accumulate in the Project Transaction table totaling 7500.00. You can assign the transactions to the asset and use the Asset Retirement page to send the transactions to PeopleSoft Asset Management.

Prerequisites to Integrate with Asset Management

Set up these installation options to integrate with PeopleSoft Asset Management:

- Specify on the Installation Options - Project Costing Integration page if asset approval is required prior to sending assets to PeopleSoft Asset Management.

  You can require approval of asset capitalization transactions before they are sent to the PeopleSoft Asset Management Loader tables (INTFC_FIN and INTFC_PHY_A). This option applies to assets that you create or adjust in PeopleSoft Project Costing. It does not apply to asset retirement transactions.

- Specify on the Integration Options - Project Costing Integration page if departments are derived from the cost transactions that come into PeopleSoft Project Costing from feeder systems.

  This enables the system to breakdown costs by department based on the department that is specified on the transaction row in the PeopleSoft Project Costing transaction table. Otherwise, there can be only one department included per asset, and the department is derived from the Department field on the Define Assets page.

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- Specify on the Integration Options - Project Costing Integration page if cost types are derived from cost transactions that come into PeopleSoft Project Costing from feeder systems.

  This enables the system to breakdown costs by cost type for assets based on the cost type specified on the transaction row in the Project Transaction table. Otherwise, there can be only one cost type included per asset, which you enter on the Define Assets page.

See Application Fundamentals: Installation Options - Project Costing Integration Page.

Common Elements Used to Manage Assets

Field or Control	Description
Asset Business Unit	Enter the asset business unit. The default value is the asset business unit that is defined for the operator ID, and it can be overridden. The default value is blank if the operator ID does not have an asset management business unit assigned as a default. This field is required to create assets from PeopleSoft Project Costing.
Asset ID or **Asset Identification**	Enter an existing asset ID, enter a new asset value, or retain the default value of *NEXT*. If you retain the default value of *NEXT*, the system assigns an asset ID to the row when you save the page. This field is required to create assets from PeopleSoft Project Costing.

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Field or Control	Description
Asset Processing Destination	Select the functions that the system performs when the asset integration process runs. The asset processing destination determines the tables that the system updates with asset information during the asset integration process. Based on the asset integration rules, the options may be: *Asset Integration Rule Default:* Select for the processing options in the express capitalization rules to take precedence for each asset. You can, however, override and apply one run option for all assets by selecting any of the other values that are in this list. *Summarize:* Select this asset processing destination to summarize asset transaction rows in the PC to AM Staging table. You can view the summarized rows in the Approve Review Assets component (PC_AM_APPROVE). This is the only available option if you require asset transaction approval before sending them to PeopleSoft Asset Management. In this case the assets must be approved in the Approve Review Assets component before they can proceed. If asset approval is not required, assets with statuses of new and approved are eligible to be sent to PeopleSoft Asset Management. *Summarize and Run Interface:* Select this asset processing destination to summarize asset transaction rows in the PC to AM Staging table and send them to the PeopleSoft Asset Management Loader tables. *Sum, Run and Load Transactions:* Select this asset processing destination to summarize asset transaction rows in the PC to AM Staging table, send them to the PeopleSoft Asset Management Loader tables, and call the Load Transactions into Asset Management Application Engine process (AMIF1000) that loads the assets from the PeopleSoft Asset Management Loader tables into PeopleSoft Asset Management production tables, such as ASSET, BOOK, COST, and so on. This is the fastest method to move asset data from PeopleSoft Project Costing into Asset Management production tables. *Run Interface:* Select this asset processing destination to use the Send to Asset Management Application Engine process (PC_AM) to move data previously sent to the PC to AM Staging table via the Summarize process, into the PeopleSoft Asset Management Loader tables with summarized transaction data. *Run Interface and Load:* Select this asset processing destination to use the Send to Asset Management process to move data previously sent to the PC to AM Staging table via the Summarize process, into the PeopleSoft Asset

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Field or Control	Description
	Management Loader tables, and call the Load Transactions into Asset Management process to load the assets from PeopleSoft Asset Management Loader tables into Asset Management.
Capitalize	(For Classic page users only) Select to create assets from the selected activity when the Express Capitalization process runs. Asset capitalization is the process to record a change in the value of an asset—either a new asset or modification of an existing asset. PeopleSoft Project Costing collects costs from feeder systems and online PC entry to use for asset capitalization.
Category	Enter a category, which is an PeopleSoft Asset Management ChartField. You can override the default value that is based on the asset profile.
Department	Enter the department that owns the asset. If the **Department ID From Transaction** option is selected on the Integration Options - Project Costing Integration page, transactions with different departments can come in from feeder systems, which enables cost breakdown by department for assets that are created from those transactions. If the installation **Department ID From Transaction** option is not selected, only one department is included per asset. In this case, the department is derived from the Department field (DEPTID) on the Define Assets page instead of the cost transactions. **Note:** To ensure data integrity in PeopleSoft Asset Management, after you specify the **Department ID From Transaction** option during installation, do not change it.
Group	Enter an existing group ID from PeopleSoft Asset Management to which to include this asset as a member. You can select a group only if the profile is a group profile.
In Service Date	Enter the date on which the asset is placed in service.
Location	Enter the asset location. The system ignores the value in this field if the **Activity** option is selected in the **Asset Location Source** group box on the Asset Integration Rule page for the activity that is related to this asset.
Manufacturer	Enter the manufacturer that is assigned to the asset. Available values are from the Manufacturer Maintenance table (MANUFACTURER).

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Field or Control	Description
Parent	Enter the parent asset or select the asset from the list of available parent assets. If the asset is designated as a parent asset on the asset definition, the system automatically populates this field with the current asset ID when you save the page.
Profile ID	Select a value for this field. A profile ID is required to create an asset in PeopleSoft Project Costing. Asset profiles are set up in PeopleSoft Asset Management. If Asset Management is not installed, you must set up asset profiles in PeopleSoft Project Costing before you can summarize transactions either by profile or by asset.
Quantity	Enter the asset quantity in PeopleSoft Asset Management. For example, an asset could be modems with a quantity of 200. During the integration process that sends the asset to PeopleSoft Asset Management, the system divides the quantity proportionally among transaction rows based on the monetary amounts in each row after they are converted to the base currency of the project business unit. If you modify the asset quantity on an asset definition page, the change is incremental for the asset. For example, if you change an asset quantity from 1 to 4, the total asset quantity is 5.
Serial ID (serial identifier)	Enter the asset serial number ID.
Tag Number	Enter a tag number that you assign to the asset for tracking purposes.
Work Order	A document that authorizes work to be performed and costs to be incurred. Typically, you generate work orders to dispatch labor resources to perform construction tasks and maintenance-related activities.

Setting Up and Using Express Capitalization

To set up and use express capitalization, use these components:

- Express Asset Transaction Filter (PC_AM_FLTR).
- Projects Options (PC_BUS_UNIT_OPT).
- Project General (PROJECT_GENERAL).
- Activity General (PROJECT_ACTIVITY).
- Project Costing - Asset Management Express (PC_AM_EXPRESS).

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Pages Used to Set Up and Use Express Capitalization

Page Name	Definition Name	Usage
Express Asset Filter Criteria Page	PC_AM_FLTR	Define the filter criteria that the system uses to select the project transactions that make up an asset.
Select Field Values Page	PC_AM_FLTR_FLD_VAL	Select field values that define the filtering criteria on the Express Asset Filter Criteria page.
Project Costing Options - Asset Integration Rules Page	PC_AM_RULE_BU	Set up integration with PeopleSoft Asset Management at the business unit level to define how the system uses project transaction costs to create assets for integration with Asset Management.
Project Definitions - Asset Integration Rules Page	PC_AM_RULE_PRJ	Set up integration with PeopleSoft Asset Management at the project level to define how the system uses project transaction costs to create assets for integration with Asset Management.
Activity Definitions - Asset Integration Rules Page	PC_AM_RULE_ACT	Set up integration with PeopleSoft Asset Management at the activity level to define how the system uses project transaction costs to create assets for integration with Asset Management.
Express Asset Definition Page (one asset per activity)	PC_AM_EXPRESS1	Create a single asset definition from each selected activity's cost transactions (one asset per activity).
Express Asset Definition Page (one asset from many activities)	PC_AM_EXPRESS2	Create a single asset definition from cost transactions from multiple activities (one asset from many activities).
Express Asset Definition Page (many assets to many activities)	PC_AM_EXPRESS3	Create multiple asset definitions from cost transactions from multiple activities (many assets from many activities).
Select Activities Page	PC_AM_SELECT_ACTS	Select the activities from which cost transactions are used to create assets.
Express Asset Definition Page (percentage distribution at the project level)	PC_AM_EXPRESS4	Enter percent values to specify how transaction costs are spread across multiple assets that are from a project (percentage distribution - project level).

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Page Name	Definition Name	Usage
Express Asset Definition Page (percentage distribution at the activity level)	PC_AM_EXPRESS5	Enter percent values to specify how transaction costs are spread across multiple assets that are from each activity (percentage distribution - activity level).
Express Asset Definition Page (quantity distribution at the project level)	PC_AM_EXPRESS6	Enter quantity values to specify the number of assets that are created from a project (quantity distribution - project level).
Express Asset Definition Page (quantity distribution at the activity level)	PC_AM_EXPRESS7	Enter quantity values to specify the number of assets that are created from each activity (quantity distribution - activity level).

Understanding the Express Asset Definition Pages

The Express Capitalization process distributes project costs to assets according to asset integration rules. For example, when multiple assets are created from a project, cost distribution can take place at the project or activity level as percentages of the project costs spread across each asset.

After you define filter criteria and asset integration rules for express capitalization, you define express assets and relate them to projects by using an Express Asset Definition page. The Express Asset Definition page that appears when you enter the Project Costing - Asset Management Express component (PC_AM_EXPRESS) is based on the asset identification rule that you select on the Asset Integration Rules page.

When you save an Express Asset Definition page, the system:

- Creates an asset definition.
- Relates the specified assets to the selected activities.
- Automatically assigns an asset ID if the **Asset ID** field contains the default value of *NEXT.*
- Enables the system to create express assets.
- Removes a previously saved relationship of an asset to an activity for each activity that you deselected in the **Capitalize** column.

Most of the Express Asset Definition pages contain three tabs that you use to define asset details: **Basic Asset, Asset Detail 1,** and **Asset Detail 2.** All of the Express Asset Definition pages contain a link to the Define Assets page to view the details of a project asset. Additionally, all of the pages display the program name if the project is inheriting asset integration rules from a program.

Many of the Express Asset Definition page fields that appear in this topic are defined in the Common Elements Used to Manage Assets topic.

Related Topics

- Project Costing Options - Asset Integration Rules Page
  Use the Project Costing Options - Asset Integration Rules page (PC_AM_RULE_BU) to set up integration with PeopleSoft Asset Management at the business unit level to define how

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the system uses project transaction costs to create assets for integration with Asset Management.

- Express Capitalization Process Page
  Use the Express Capitalization Process page (RUN_PC_EXP_CAP) to specify run control parameters to run the Express Capitalization process, which creates and sends PeopleSoft Project Costing assets to PeopleSoft Asset Management.
- Define Assets Page
  Use the Define Assets page (PC_AM_DEFN) to specify basic information about a project asset.

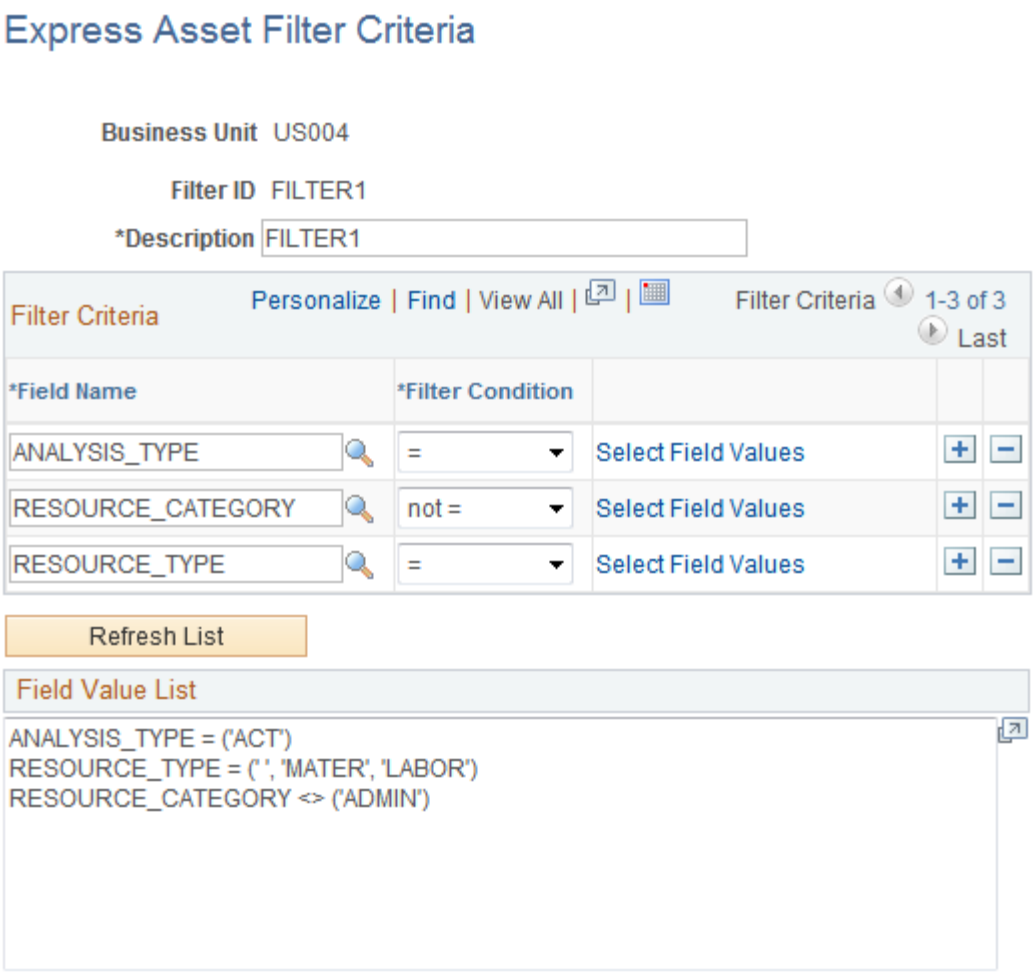
Express Asset Filter Criteria Page

Use the Express Asset Filter Criteria page (PC_AM_FLTR) to define the filter criteria that the system uses to select the project transactions that make up an asset.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Express Asset Filters**

This example illustrates the fields and controls on the Express Asset Filter Criteria page. You can find definitions for the fields and controls later on this page.



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Create a filter that the system uses to select the transaction costs that are eligible for express capitalization. Add rows to designate additional parameters to narrow selections to the appropriate set of transactions. The filter that you create is available for selection on the Asset Integration Rules page at the business unit, project, and activity levels.

Field or Control	Description
Field Name	Enter the field name to use as filter criteria. You must select *ANALYSIS_TYPE* as part of the filter criteria or you will receive an error message when you try to save the page.
Filter Condition	Select the operand that determines if the filter criteria is = or *not* = to the selected field values.
Select Field Values	Click to access the Select Field Values page and select one or more values to use as filter criteria.
Refresh List	Click to update the **Field Value List** grid that displays the parameters that the system uses to uses to select the transactions that are eligible for express capitalization.
Field Value List	Displays the parameters that you create to filter transactions for express capitalization.

> **Note**
>
> If the integration template is different than the Project Costing business unit, the Express Asset Filter Criteria uses the General Ledger business unit for accounting periods, which is specified on the Project Costing Business Unit Options page.

Select Field Values Page

Use the Select Field Values page (PC_AM_FLTR_FLD_VAL) to select field values that define the filtering criteria on the Express Asset Filter Criteria page.

Navigation:

Click the **Select Field Values** link on the Express Asset Filter Criteria page.

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

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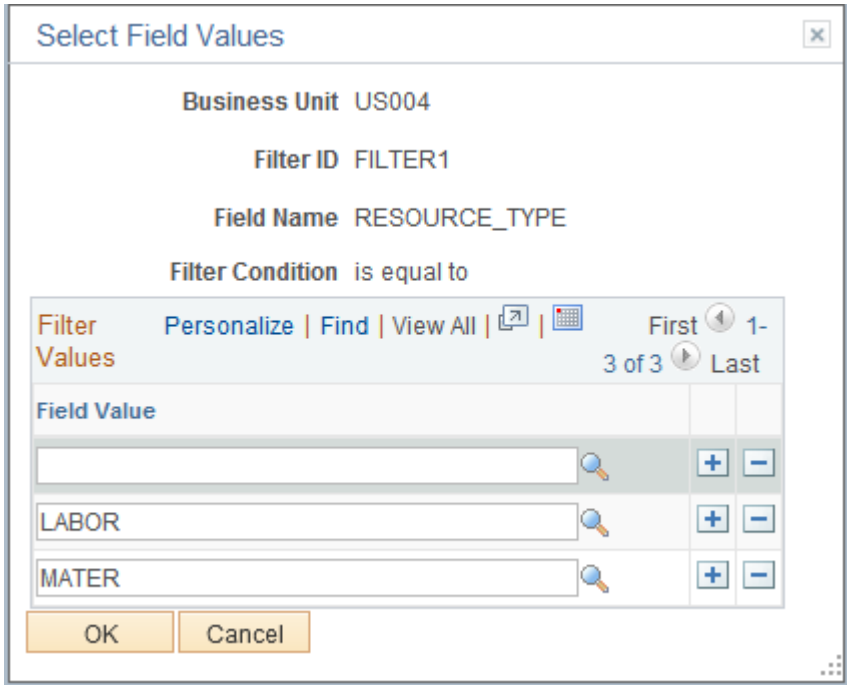

Field or Control	Description
Field Value	Select one or more field values that defines the filter criteria on the Express Asset Transaction Filter page. Leave the field value blank to specify a blank value as valid filter criteria. Blank values appear in the field value list in the Express Asset Transaction Filter page as an empty pair of single quotes. The values that are available for the *ANALYSIS_TYPE* field name are based on the analysis types with positive multipliers in analysis groups PC to AM Asset Summary (CLOSE), PC to AM Proceeds from Sale (AMPFS), and PC to AM Cost of Removal (AMCOR).
OK	Click to return to the Express Asset Filter Criteria page, where you can click **Refresh List** to view the updated list of parameters that the system uses to uses to select eligible transactions. **Note:** Click **Save** on the Express Asset Filter Criteria page to save the changes that you make on the Select Field Values page.

Project Costing Options - Asset Integration Rules Page

Use the Project Costing Options - Asset Integration Rules page (PC_AM_RULE_BU) to set up integration with PeopleSoft Asset Management at the business unit level to define how the system uses project transaction costs to create assets for integration with Asset Management.

Navigation:

Setup Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Project Costing Options**. Select the **Asset Integration Rules** tab.

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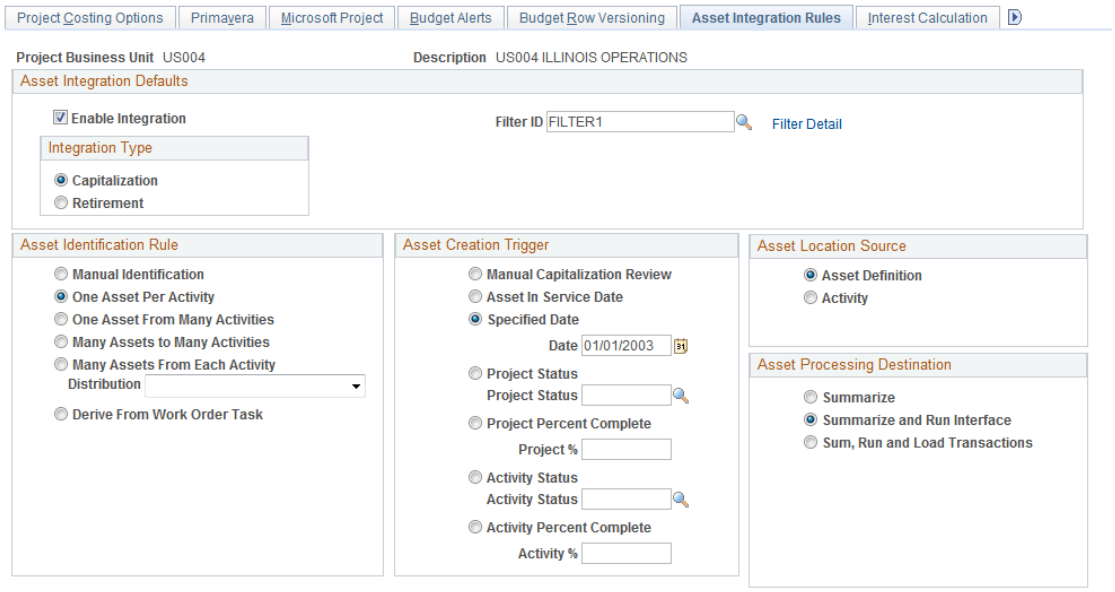
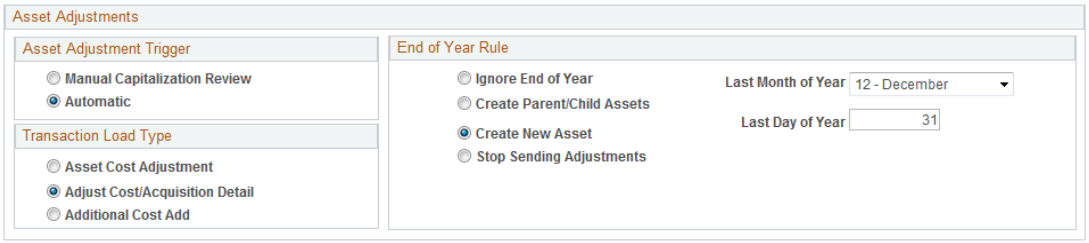
> **Note**
>
> There are three Asset Integration Rules pages in PeopleSoft Project Costing—one at the business unit level, project level, and activity level. The navigation path to these pages is based on whether you are defining the integration rules for the business unit, project, or activity. The field definitions that appear in this section are applicable for all three pages.

This example illustrates the fields and controls on the Asset Integration Rules page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Asset Integration Rules page (2 of 2). You can find definitions for the fields and controls later on this page.



If you enable integration for the business unit, projects inherit asset integration rules that you establish at the business unit level. You can override business unit default values at the project level. Activities also inherit asset integration rules from the project level. Based on the project's capitalization rule, you can override some of the asset integration rules at the activity level.

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Asset Integration Defaults

Field or Control	Description
Enable Integration	Select this option to enable PeopleSoft Asset Management integration processes (manual or express) to create assets from the business unit's project activities. **Note:** You must enable integration at the business unit level and the project level for a project to be eligible for asset capitalization. To enable integration on a project that contains an asset that is related to another project, first perform either of these actions: • Use the Inherit from Program functionality. Enter the same program ID in the **Inherit from Program** field on the Asset Integration Rules page for all projects that you want to relate to the asset. This enables you to relate an asset to multiple projects in the same program. • Disable asset integration on the other project that is related to the asset. For example, assume that Project A is related to Asset A. The asset has already been created and capitalized, and the project is closed. Now you want to create Project B for the purpose of entering capital adjustments to Asset A. You must first disable integration on Project A to relate Asset A to Project B.
Filter ID	Select a user-defined filter that determines what transactions in a project are eligible for asset integration processing. This field is required for all asset identification rules except the **Manual** option. The system clears the value in the **Filter ID** field if you capitalize assets manually. You define filters on the Express Asset Filter Criteria page.
Filter Detail	Click to access a read only view of the Express Asset Filter Criteria page where you defined the filter criteria for the system to use to select the project transactions that make up an asset when you use the Express Capitalization process.

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Field or Control	Description
Inherit from Program	Enter an active summary project or program that contains child projects, each needing to contribute transaction costs to the same asset. This field is enabled at the project level, and view only at the activity level. When you enter a summary project or program and click **Restore Defaults,** the system disables the asset integration rules at the project and activity levels, except for the fields in the **Asset Integration Defaults** group box. If you change the asset integration rules for the program, the system applies the changes to the project and activity to keep the rules consistent across all projects that contribute to an asset. To enable the disabled fields so that you can modify the asset integration rules, deselect the **Inherit from Program** field and save the page. Programs that are available for selection are those with an active processing status and the **Program** option selected on the Project Definition - General Information page.
Restore Defaults	Click to populate and override the asset integration rules with the rules that are established at the parent level. This button is available at the project and activity levels only. If you enter a program in the **Inherit from Program** field, the **Restore Defaults** button populates and overrides the asset integration rules for the project and its activities with the rules that are established at the program level. If you do not use the Inherit from Program feature and you modify the project level asset integration rules, click **Restore Defaults** to revert back to the business unit default values. If you modify the activity level asset integration rules and want to restore the project asset integration rules, click **Restore Defaults** to revert back to the project values. **Note:** You can modify the activity level asset integration rules only if you do not use the Inherit from Program feature and the asset identification rule is **One Asset Per Activity.** Regardless of the Inherit from Program feature, if assets are already related to the project using a different capitalization rule, you can only change the asset identification rule to **Manual.** **Note:** After you click **Restore Defaults,** you must save the page to commit the changes to the database. To undo the changes without saving, exit the page.

Integration Type

Select an option to specify if the project activity is for retiring or capitalizing assets. The default value at the project level is from the business unit. The default value at the activity level is from

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the project. After you create a project or activity, changes to the value at a higher level do not change existing projects or activities at a lower level.

Asset Identification Rule

Select the method for distributing project costs and creating assets. The available asset creation triggers and location sources are based on the asset identification rule that you select.

> **Note**
>
> The system disables most of the asset integration rules at the activity level when you select any asset identification rule, except for the **One Asset Per Activity** and **Derive From Work Order Task** options. This prevents confusion from options such as **One Asset from Many Activities** where each activity can specify a different rule. Regardless of the asset identification rule that you select, the enable integration, filter, and integration type options in the **Asset Integration Defaults** group box remain enabled.

Field or Control	Description
Manual Identification	Select to capitalize assets by using components that require manual steps. This option does not use express capitalization functionality to create assets for this project. You must select this option to retire an asset that is associated with this project or its activity.
One Asset Per Activity	Select to distribute the cost of a single activity to a single asset by using express capitalization. All of the asset creation triggers and location sources are available when the capitalization rule option is one asset per activity.
One Asset From Many Activities	Select to distribute the cost of multiple activities to a single asset by using express capitalization.
Many Assets to Many Activities	Select to distribute the cost of multiple activities to multiple assets by using express capitalization.
Many Assets From Each Activity	Select to distribute the cost of each activity to multiple assets by cost percentage or quantity by using express capitalization. Cost distribution takes place at the project level or the activity level based on the method that you select in the required **Distribution** field.

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Field or Control	Description
Distribution	Select a distribution method. Available options are: *Activity Percent Distribution:* Create assets by distributing cost percentages at the activity level. *Activity Quantity Distribution:* Create assets by distributing quantities at the activity level. *Project Percent Distribution:* Create assets by distributing cost percentages at the project level. *Project Quantity Distribution:* Create assets by distributing quantities at the project level. This field is required if you select a capitalization rule of many assets from each activity.
Derive From Work Order Task	Select to enable the Express Capitalization process to identify the transaction rows in activities that belong to assets. If the **Work Order Managed Project** flag is active for a project, the system automatically selects this asset identification rule. This option is: • Available only if you use PeopleSoft Maintenance Management. • Used only to adjust or retire assets that already exist in PeopleSoft Asset Management. • Required for work order-managed projects and activities. • Optional for Project Costing-managed projects and activities. **Note:** If the integration type is **Retirement,** the **Derive from Work Order Task** option is available only if the project is work order-managed. See Understanding Integration with PeopleSoft Maintenance Management.

Asset Creation Trigger

Select the event that causes asset integration to occur automatically. You must select an asset integration trigger if you enable integration.

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Field or Control	Description
Manual Capitalization Review	Select if the asset integration process requires manual intervention. The manual integration trigger requires that assets are reviewed before they are sent to PeopleSoft Asset Management. **Manual Capitalization Review** is the only valid asset creation trigger that is recognized by the Asset Retirement Integration process if you select an integration type of **Retirement.** Asset creation triggers are not applicable for work order-managed projects.
Asset In Service Date	Select for asset integration to occur on the in-service date that is specified in the asset definition.
Specified Date	Select for asset integration to occur on the date that you specify in the **Date** field.
Project Status	Select for asset integration to occur when the project status matches the value that you specify in the **Project Status** field.
Project Percent Complete	Select for asset integration to occur when the project completion percentage meets or exceeds the value that you specify in the **Project %** (project percentage) field.
Activity Status	Select for asset integration to occur when the activity status matches the value that you specify in the **Activity Status** field. This field is available only when you select the capitalization rule option of one asset per activity.
Activity Percent Complete	Select for asset integration to occur when the activity completion percentage meets or exceeds the value that you specify in the **Activity %** (activity percentage) field. This field is available only when the capitalization rule option is one asset per activity.

When you save the page, a message appears indicating that the system will ignore the unselected asset integration triggers and the system clears their values from the page.

Asset Location Source

You must select an asset location source if you enable integration.

Field or Control	Description
Asset Definition	Select for the asset integration process to use the asset definition location code to determine the asset location. All capitalization rules must use this location source except the one asset per activity option, which can use either the asset definition or the activity option.

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Field or Control	Description
Activity	Select for the asset integration process to use the activity definition location code to determine the asset location. This option is available only if you select the capitalization rule option of one asset per activity.

Asset Processing Destination

Select the default option that determines what tables that the system updates with asset information during the asset integration process.

If you require asset approval before sending assets to PeopleSoft Asset Management, the available option is *Summarize.*

If you do not require asset approval before sending assets to PeopleSoft Asset Management, the available options are:

Summarize

Summarize and Run Interface

Sum, Run and Load Transactions

You must select an asset processing destination if you enable integration.

Asset processing destination options are discussed in the Common Elements Used to Manage Assets topic.

Asset Adjustment Trigger

Select if you want to create asset adjustments manually or automatically. You must select an adjustment trigger if you enable integration.

Field or Control	Description
Manual Capitalization Review	Select if the asset integration process requires manual intervention. The manual integration trigger requires that assets are reviewed before they are sent to PeopleSoft Asset Management.
Automatic	Select for the system to adjust assets automatically when you run the integration process from the Express Capitalization Process run control page. If the **Work Order Managed Project** flag is activated for a project, the system selects an asset adjustment trigger of **Automatic.**

> **Note**
>
> The transaction date of an adjustment that you make after an asset is created must be equal to or greater than the previous transaction date.

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Transaction Load Type

The system uses transaction load types to determine the types of transactions that occur when the Load Transaction into Asset Management process loads rows into the PeopleSoft Asset Management transaction tables. Different load types set different attributes of an asset, perform different asset processing, or load different asset tables.

See PeopleSoft Asset Management: Understanding the Loader Tables.

These transaction load type options enable different processing to occur when cost adjustments are sent to PeopleSoft Asset Management. You must select a transaction load type if you enable integration.

Field or Control	Description
Asset Cost Adjustment	Select for asset processing to occur for adjustment transactions using the ADJ load type. This load type adjusts the cost of an existing asset, and is the load type that PeopleSoft Project Costing typically uses to send adjustments to PeopleSoft Asset Management. The system updates the Asset Cost Transactions (COST), and AM Open Transactions (OPEN_TRANS) tables.
Adjust Cost/Acquisition Detail	Select for asset processing to occur for adjustment transactions using the ADQ load type. This load type adjusts the cost and acquisition details of an existing asset. The system updates the Asset Cost Transactions, AM Open Transactions, and Asset Acquisition Detail (ASSET_ACQ_DET) tables. If the **Work Order Managed Project** flag is activated for a project, the system selects a transaction load type of **Adjust Cost/ Acquisition Detail.**
Additional Cost Add	Select for asset processing to occur for adjustment transactions using the AAD load type, which adds additional cost information to an asset. This load type is rarely used, and is primarily for joint venture and composite roll-ups. The system updates the Asset Cost Transactions and AM Open Transactions tables.

End of Year Rule

You must select an end-of-year rule if you enable integration.

Field or Control	Description
Ignore End of Year	Select to continue creating asset adjustments as if there is no designated end of year. If the **Work Order Managed Project** flag is activated for a project, the system selects an end of year rule of **Ignore End of Year.**
Create Parent/Child Assets	Select to create new assets that are children to the original assets if adjustments are sent from the project after the specified end of the year.

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Field or Control	Description
Create New Asset	Select to create new assets if adjustments are sent after the specified end of the year.
Stop Sending Adjustments	Select for PeopleSoft Project Costing to no longer send adjustments to PeopleSoft Asset Management after the specified end of year.
Last Month of Year and **Last Day of Year**	Indicate the end of the year for adjustment purposes by selecting a month and a date. These fields are required for all end-of-year rules, except for the **Ignore End of Year** option.

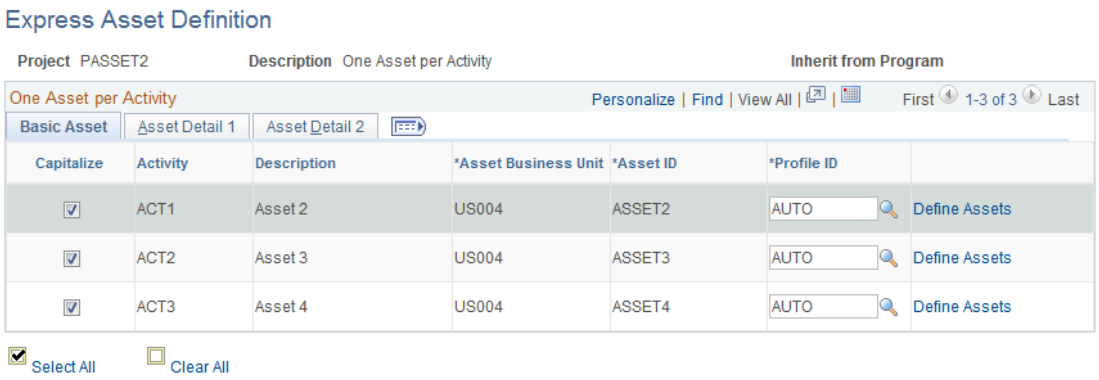
Express Asset Definition Page (one asset per activity)

Use the Express Asset Definition page (PC_AM_EXPRESS1) to create a single asset definition from each selected activity's cost transactions (one asset per activity).

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Definition**, and then **Express Asset Definition**

This example illustrates the fields and controls on the Express Asset Definition page (one asset per activity). You can find definitions for the fields and controls later on this page.



This page appears when the project capitalization rule is one asset per activity.

This page displays a list of every activity under a project, matching every activity to an asset ID and additional asset details.

When you save the page, the system creates an asset definition for each activity that you selected in the **Capitalize** column and relates that asset to each activity.

Express Asset Definition Page (one asset from many activities)

Use the Express Asset Definition page (PC_AM_EXPRESS2) to create a single asset definition from cost transactions from multiple activities (one asset from many activities).

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Definition**, and then **Express Asset Definition**

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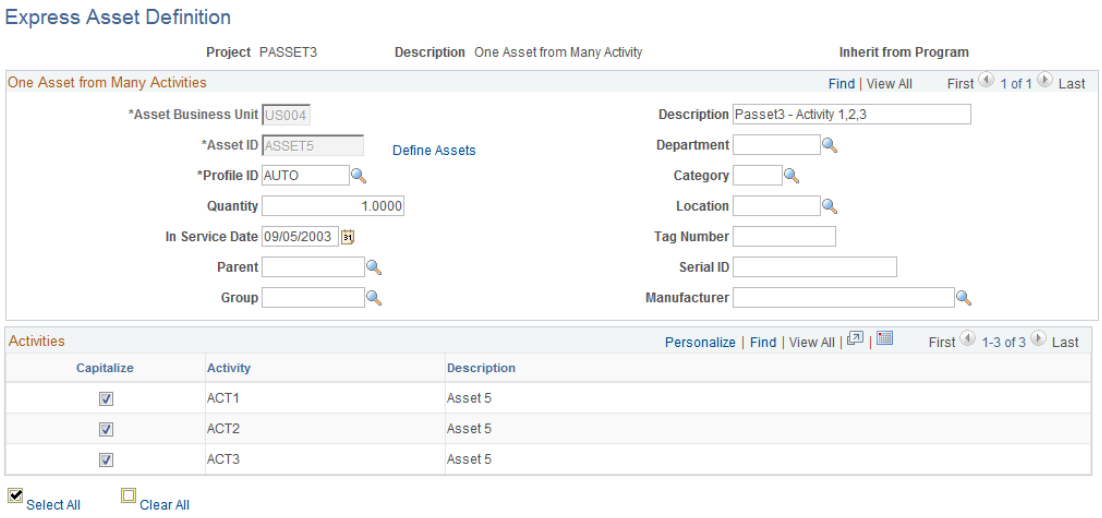
This example illustrates the fields and controls on the Express Asset Definition page (one asset from many activities). You can find definitions for the fields and controls later on this page.



This page appears when the project capitalization rule is one asset from many activities.

Field or Control	Description
Capitalize	Select activities that you want to relate to the asset that is identified in the **Asset ID** field.

The system creates a single asset definition when you save the page and relates the asset to each activity that you select in the **Capitalize** column.

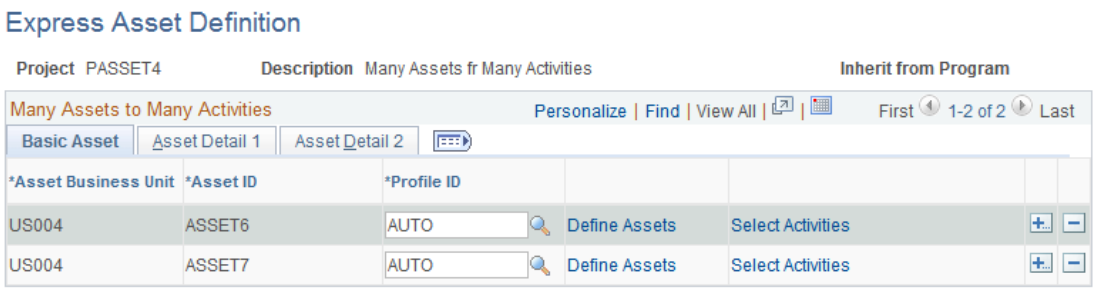
Express Asset Definition Page (many assets to many activities)

Use the Express Asset Definition page (PC_AM_EXPRESS3) to create multiple asset definitions from cost transactions from multiple activities (many assets from many activities).

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Definition**, and then **Express Asset Definition**

This example illustrates the fields and controls on the Express Asset Definition page (many assets to many activities). You can find definitions for the fields and controls later on this page.



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This page appears when the project capitalization rule is many assets to many activities.

Add a row for each asset that will be created, and enter the necessary values to define express assets and relate them to a project and project activities.

Field or Control	Description
Select Activities	Click to access the Select Activities page to select the activities that contribute transaction costs to an asset.

When you save the page the system creates asset definitions and relates the assets to the activities that you select on the Select Activities page.

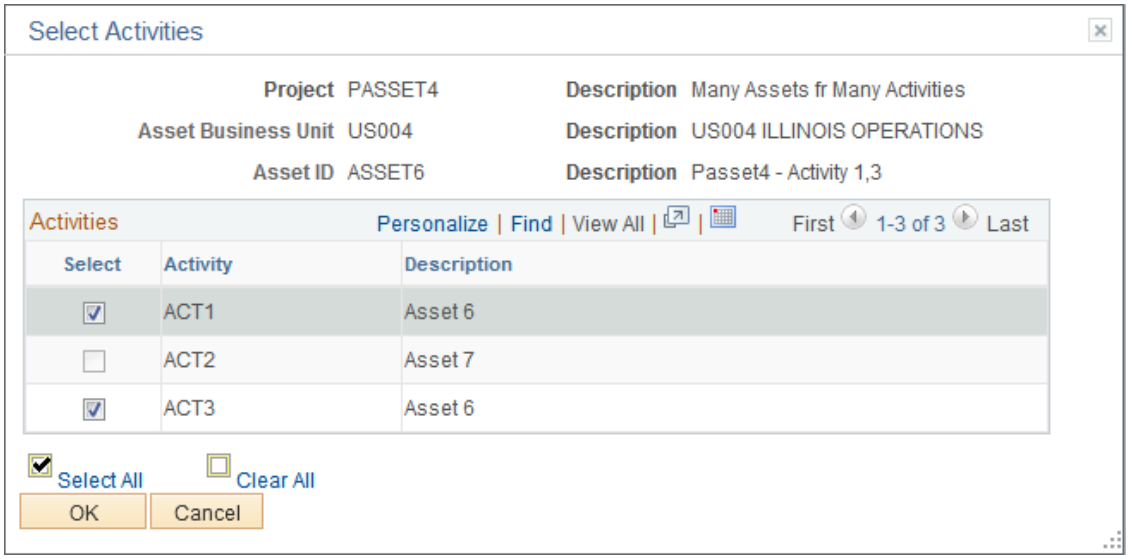
Select Activities Page

Use the Select Activities page (PC_AM_SELECT_ACTS) to select the activities from which cost transactions are used to create assets.

Navigation:

Click the **Select Activities** link on the Express Asset Definition - Many Assets from Many Activities page.

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



Select the activities that contribute costs to the asset that is defined on the Express Asset Definition page (many assets from many activities). You can select an activity for only one asset definition.

Express Asset Definition Page (percentage distribution at the project level)

Use the Express Asset Definition page (PC_AM_EXPRESS4) to enter percent values to specify how transaction costs are spread across multiple assets that are from a project (percentage distribution - project level).

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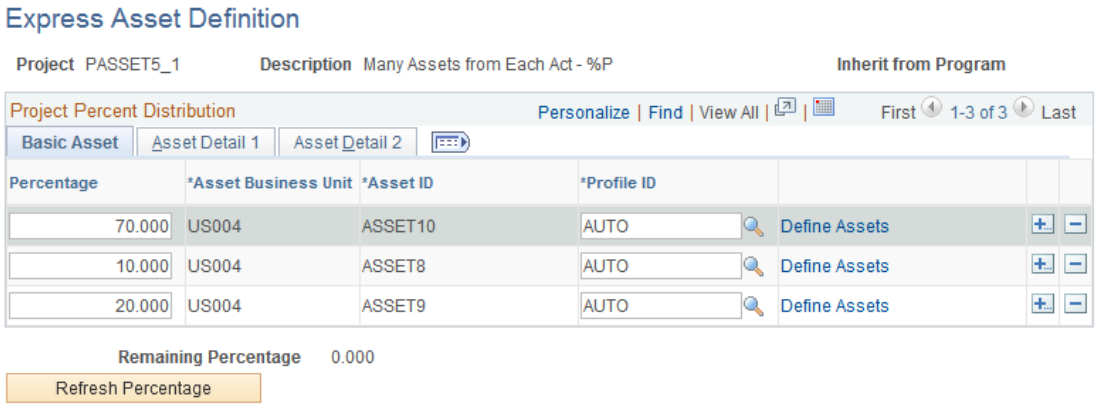
Navigation:

Project Costing, and then **Assets**, and then **Express Asset Definition**, and then **Express Asset Definition**

This example illustrates the fields and controls on the Express Asset Definition page (percentage distribution at the project level). You can find definitions for the fields and controls later on this page.



This page appears when the project capitalization rule is many assets from each activity, and the distribution option is project percent distribution.

Add a row for each asset that will be created, and enter the necessary values to define express assets and relate them to a project and project activities.

Field or Control	Description
Percentage	Enter a value that reflects the proportion of project costs to distribute to this asset. When cost is distributed at the project level, the system applies the percentage value to all activities that are in the project and that have integration enabled on the Activity Definition - Asset Integration Rules page.
Refresh Percentage	Click this button to sum the values from the **Percentage** field in each row, subtract the sum from 100, and display the result in the **Remaining Percentage** field.

When you save the page the system creates asset definitions and relates the assets to each activity under this project that has integration enabled at the activity level on the Asset Integration Rules page.

This distribution method relates assets to the entire project. Because of this relationship, each activity in the project contributes the same percentage that is specified on the asset row to the asset. This table illustrates an example in which a project with three activities distributes cost to two express assets:

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Percentage at the Project Level	Asset 1	Asset 2
Asset 1 to receive 75%	75% of Activity 1	25% of Activity 1
Asset 2 to receive 25%	75% of Activity 2	25% of Activity 2
	75% of Activity 3	25% of Activity 3

In this example, distributing cost percentages at the project level results in creating two assets with each activity contributing 75 percent of its cost to Asset 1 and 25 percent of its cost to Asset 2.

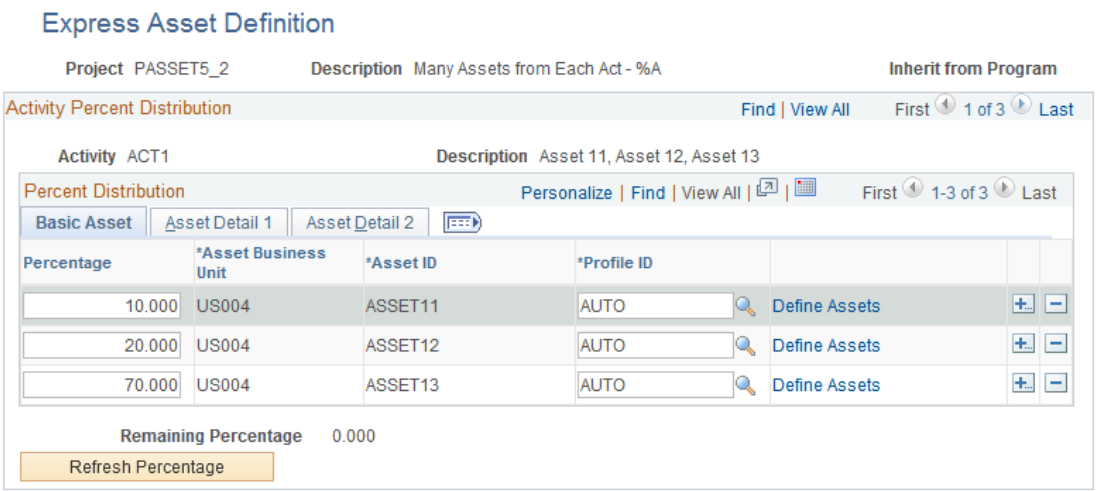
Express Asset Definition Page (percentage distribution at the activity level)

Use the Express Asset Definition page (PC_AM_EXPRESS5) to enter percent values to specify how transaction costs are spread across multiple assets that are from each activity (percentage distribution - activity level).

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Definition**, and then **Express Asset Definition**

This example illustrates the fields and controls on the Express Asset Definition page (percentage distribution at the activity level). You can find definitions for the fields and controls later on this page.



This page appears when the project capitalization rule is many assets from each activity, and the distribution option is activity percent distribution.

Add a row for each asset that will be created, and enter the necessary values to define express assets and relate them to a project and project activities.

Field or Control	Description
Percentage	Enter a value that reflects the proportion of activity costs to distribute to the asset.

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Field or Control	Description
Refresh Percentage	Click this button to sum the values from the **Percentage** field in each row, subtract the sum from 100, and display the result in the **Remaining Percentage** field.

Using this distribution method, assets are related to activities within the designated project. Because of this relationship, each activity contributes the specified percentage on the asset row to the asset. This table illustrates an example in which a project with two activities distributes cost to each activity's respective assets:

Activity	Percentage	Asset 1	Asset 2	Asset 2	Asset 3	Asset 4
Activity 1	Asset 1 to receive 75% Asset 2 to receive 25%	75% of Activity 1	25% of Activity 1			
Activity 2	Asset 2 to receive 50% Asset 3 to receive 40% Asset 4 to receive 10%			50% of Activity 2	40% of Activity 2	10% of Activity 2

In this example, distributing cost percentages at the activity level results in each activity contributing a specified percentage of its cost to its respective assets. Note that the same asset (Asset 2 in this example) can draw its costs from more than one activity.

Express Asset Definition Page (quantity distribution at the project level)

Use the Express Asset Definition page (PC_AM_EXPRESS6) to enter quantity values to specify the number of assets that are created from a project (quantity distribution - project level).

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Definition**, and then **Express Asset Definition**

This example illustrates the fields and controls on the Express Asset Definition page (quantity distribution at the project level). You can find definitions for the fields and controls later on this page.

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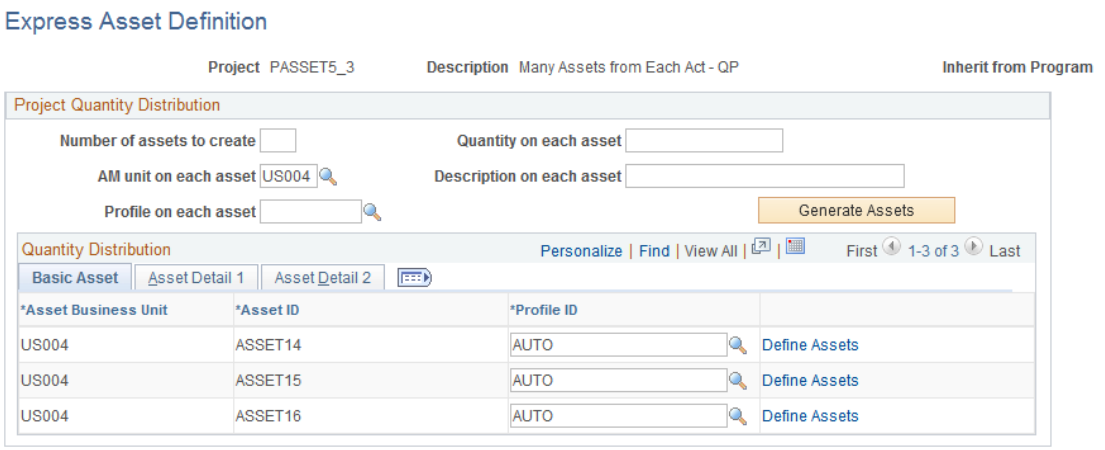

This page appears when the navigation menu and the project capitalization rule is many assets from each activity, and the distribution option is project quantity distribution.

Enter parameters to indicate the number of assets to create from the designated project. After generating the list of assets that will be created, enter the necessary values to define express assets and relate them to a project and project activities.

Field or Control	Description
Number of assets to create	Enter the number of asset rows that the system will generate for the project. After rows are created, you can change this value to increase or decrease the number of rows. At least one row must always appear.
AM unit on each asset, Profile on each asset, Quantity on each asset, and **Description on each asset**	Enter values that will populate the corresponding fields on asset rows that appear in the **Quantity Distribution** grid after you click the **Generate Assets** button. The asset management business unit and profile appear on the **Basic Asset** tab. The asset description and quantity appear on the **Asset Detail 1** tab.
Generate Assets	Click this button to create the number of asset rows that you specified in the **Number of assets to create** field. The system populates the new asset rows with the field values from the **Project Quantity Distribution** group box. When you change the **Number of assets to create** field value, click **Generate Assets** to update the number of rows that appear. To clear all asset rows, enter a zero in the **Number of assets to create** field and click **Generate Assets.**

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> **Warning**
>
> If you click **Generate Assets** after asset rows are created, the system deletes all existing rows and replaces them with the number of new rows that are specified in the **Number of assets to create** field.

When you save the page, the system relates the assets to each activity under this project that has integration enabled on the Asset Integration Rules page at the activity level. Additionally, the system distributes the project costs equally across the assets.

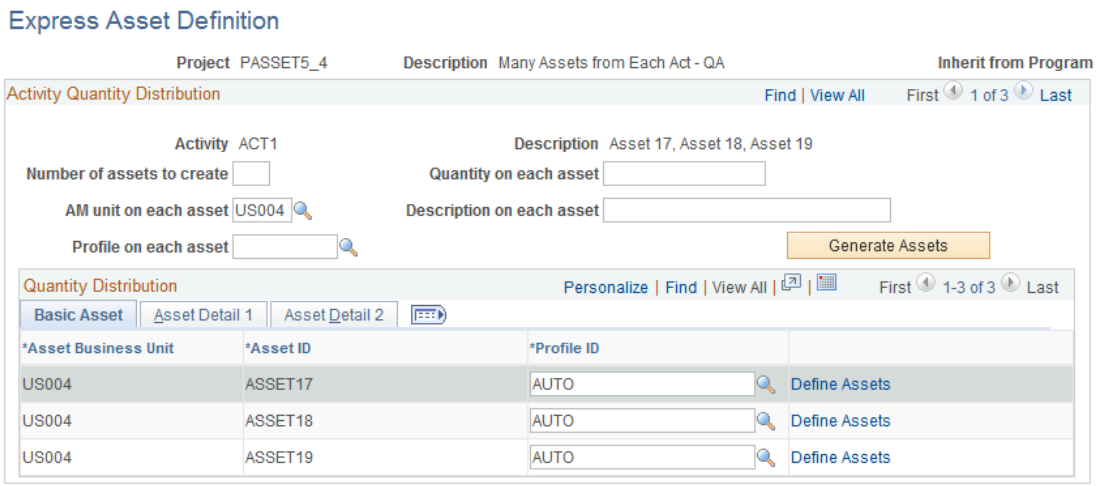
Express Asset Definition Page (quantity distribution at the activity level)

Use the Express Asset Definition page (PC_AM_EXPRESS7) to enter quantity values to specify the number of assets that are created from each activity (quantity distribution - activity level).

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Definition**, and then **Express Asset Definition**

This example illustrates the fields and controls on the Express Asset Definition page (quantity distribution at the activity level). You can find definitions for the fields and controls later on this page.



This page appears when the project capitalization rule is many assets from each activity and the distribution option is activity quantity distribution.

Enter parameters to indicate the number of assets that are created from each of the designated project's activities. After generating the list of assets that will be created, enter the necessary values to define express assets and relate them to a project and project activities.

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Field or Control	Description
Number of assets to create	Enter the number of asset rows that the system will generate for the project. After rows are created, you can change this value to increase or decrease the number of rows. At least one row must always appear.
AM unit on each asset, Profile on each asset, Quantity on each asset, and **Description on each asset**	Enter values that will populate the corresponding fields on asset rows that appear in the **Quantity Distribution** grid after you click the **Generate Assets** button. The asset management business unit and profile appear on the **Basic Asset** tab. The asset description and quantity appear on the **Asset Detail 1** tab.
Generate Assets	Click this button to create the number of asset rows that you specified in the **Number of assets to create** field. The system populates the new asset rows with the field values from the **Activity Quantity Distribution** group box. When you change the **Number of assets to create** field value, click **Generate Assets** to update the number of rows that appear. To clear all asset rows, enter a zero in the **Number of assets to create** field and click **Generate Assets.**

> **Warning**
>
> If you click **Generate Assets** after asset rows are created, the system will delete all existing rows and replace them with the number of new rows that are specified in the **Number of assets to create** field.

When you save the page, the system distributes the activity costs equally across the assets.

Running the Express Capitalization Process

Pages Used to Run the Express Capitalization Process

Page Name	Definition Name	Usage
Manual Capitalization Review Page	PC_AM_MAN_CAP	Review and select assets to capitalize from a list of assets that have either the manual asset creation or the manual adjustment trigger selected. Run the Express Capitalization process to create and send PeopleSoft Project Costing assets to PeopleSoft Asset Management.

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Page Name	Definition Name	Usage
Express Capitalization Process Page	RUN_PC_EXP_CAP	Specify run control parameters to run the Express Capitalization process, which creates and sends PeopleSoft Project Costing assets to PeopleSoft Asset Management.

Manual Capitalization Review Page

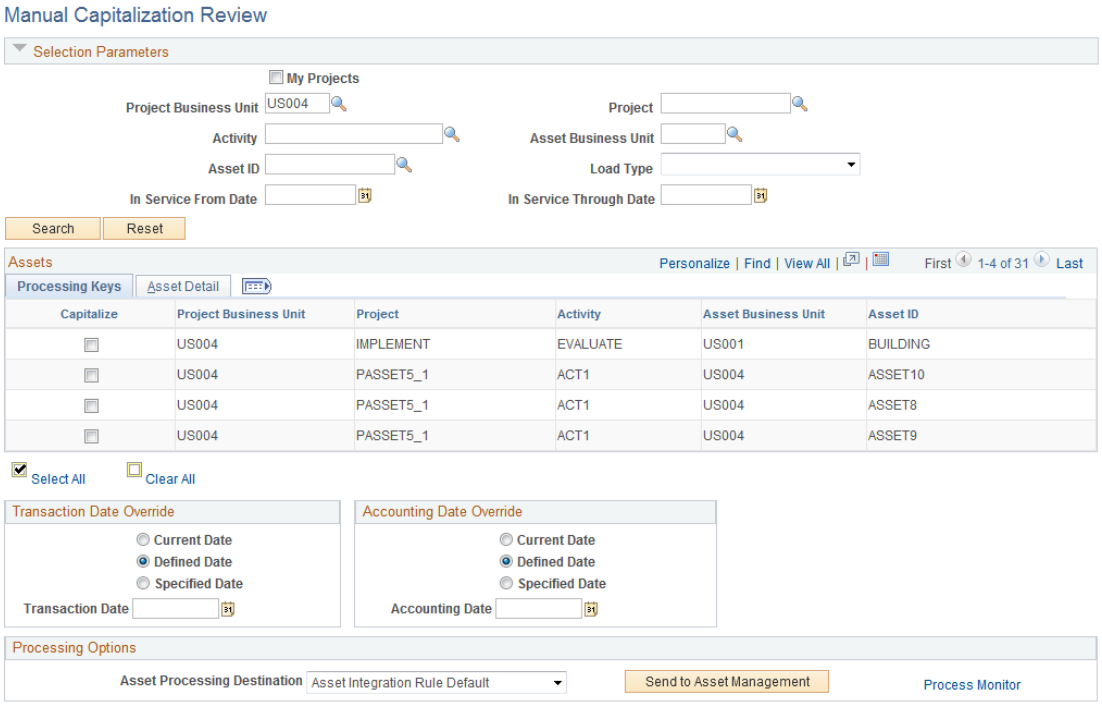
Use the Manual Capitalization Review page (PC_AM_MAN_CAP) to review and select assets to capitalize from a list of assets that have either the manual asset creation or the manual adjustment trigger selected.

Run the Express Capitalization process to create and send PeopleSoft Project Costing assets to PeopleSoft Asset Management.

Navigation:

Project Costing, and then **Assets**, and then **Manual Capitalization Review**, and then **Manual Capitalization Review**

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



When the asset creation trigger is **Manual Capitalization Review** on the Asset Integration Rules page, assets that are created from project transactions must be reviewed before they are sent to PeopleSoft Asset Management. When the asset adjustment trigger is **Manual Capitalization Review,** asset adjustments must be reviewed before they are sent to PeopleSoft Asset Management.

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On this page you can retrieve the list of assets either by selecting the **My Projects** option or by entering a project business unit. Click **Reset** to clear the search criteria.

After you select the appropriate selection criteria, click **Search** to display a list of assets that require a review.

Field or Control	Description
Transaction Date Override and **Accounting Date Override**	Select the date type that the system uses as the transaction date or the accounting date on all assets that are processed in this run control. Available options are: *Current Date:* The system stamps the Application Engine processing date on all assets that are processed in the run control. *Defined Date:* The system uses the transaction date and accounting date that are specified on the Define Assets page as the dates for this run control. This is the default value. **Note:** If you select the defined date for the transaction date override, you must also select defined date for the accounting date override. This ensures that you enter an accounting date on the run control page that is later than the transaction date. Additionally, you cannot select defined date as a transaction date override, and current date as an accounting date override, when you run the integration process. *Specified Date:* Enter a date that the Send to Asset Management process uses to apply the appropriate date treatment to all assets that are capitalized in this run control. **Note:** If you override the dates at run time that deviate from the defined dates, the system updates the values on Define Assets page.
Asset Processing Destination	Select the option that determines how far the asset data flows into PeopleSoft Asset Management when you click **Send to Asset Management.** If you require asset approval before sending assets to PeopleSoft Asset Management, the available options are: *Asset Integration Rule Default* *Summarize* If you do not require asset approval before sending assets to PeopleSoft Asset Management, the available options are: *Asset Integration Rule Default* *Summarize* *Summarize and Run Interface* *Sum, Run and Load Transactions* Asset processing destination options are discussed in the Common Elements Used to Manage Assets topic.

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Field or Control	Description
Send to Asset Management	Click to run the Express Capitalization process based on the asset processing destination for the selected assets.

Express Capitalization Process Page

Use the Express Capitalization Process page (RUN_PC_EXP_CAP) to specify run control parameters to run the Express Capitalization process, which creates and sends PeopleSoft Project Costing assets to PeopleSoft Asset Management.

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Capitalization**

The Express Capitalization process runs at the business unit level and performs the following:

- Processes the PeopleSoft Project Costing activities whose asset integration trigger event has occurred, when the Express Capitalization process is initiated from a run control page or a scheduled process.

  The process does not occur for activities with manual asset integration triggers.
- Assigns the cost transactions to their respective assets, and applies the end-of-year rule for adjustments and the remaining integration rules.

Field or Control	Description
Asset Processing Destination	Select the option that determines how far the asset data flows into PeopleSoft Asset Management when you run the process. If you require asset approval before sending assets to PeopleSoft Asset Management, the available options are: *Asset Integration Rule Default* *Summarize* If you do not require asset approval before sending assets to PeopleSoft Asset Management, the available options are: *Asset Integration Rule Default* *Summarize* *Summarize and Run Interface* *Sum, Run and Load Transactions*
Date Option	Select the required date range for running the Express Capitalization process. The date options are *Accounting Date*, *All*, and *Transaction Date*. You can enter the *From* and *To* dates if you select the Accounting and Transaction date options. The Express Capitalization process picks up the transactions within the date range and runs the process. If you select *All*, the run control process considers all the transactions.

Asset processing destination options are discussed in the Common Elements Used to Manage Assets topic.

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> **Note**
>
> You can initiate the Express Capitalization process from the Manual Capitalization Review page to process PeopleSoft Project Costing activities with an asset integration trigger of manual capitalization review.
>
> PeopleSoft Project Costing does not perform open period validation when sending transactions to PeopleSoft Asset Management.

Setting Up and Using Manual Capitalization

To set up and use manual capitalization, use these components to create an asset, project, activity and higher-level configuration:

- Asset Profile (PROFILE_PC)
- Project Costing Options (PC_BUS_UNIT_OPT)
- Project General (PROJECT_GENERAL)
- Activity General (PROJECT_ACTIVITY)
- Project Costing Asset Definition (PC_AM_DEFN).

These pages are used to relate assets to specific project activities and assign transactions to the asset using the classic interface:

- Relate Assets by Project ID (PC_PCAM_DEFN)
- Assign Resources to an Asset component (PC_AM_RESOURCES)
- Selection Criteria component (PC_SEL_CRITERIA).

These pages are used to relate assets to specific project activities and assign transactions to asset using fluid:

- Relate Asset to Activities (PC_AMPC_REL_FL)
- Assign Cost to Asset (PC_AM_CAP_CRIT_FL)
- Capitalization Template page (PC_AM_CAP_TPL_FL).

Pages Used to Set Up and Use Manual Capitalization

Page Name	Definition Name	Usage
Asset Profile Page	PROFILE_DEFN_PC	Create asset profiles in PeopleSoft Project Costing if you do not use PeopleSoft Asset Management.
Project Costing Options - Asset Integration Rules Page	PC_AM_RULE_BU	Set up integration with PeopleSoft Asset Management at the business unit level.
Project Definitions - Asset Integration Rules Page	PC_AM_RULE_PRJ	Set up integration with PeopleSoft Asset Management at the project level.

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Page Name	Definition Name	Usage
Activity Definitions - Asset Integration Rules Page	PC_AM_RULE_ACT	Set up integration with PeopleSoft Asset Management at the activity level.
Define Assets Page	PC_AM_DEFN	Specify basic information about a project asset.
Relate by Project Page	PC_PCAM_DEFN	(For Classic page users only) Associate assets with a specific project.
Relate by Asset Page		(For Classic page users only) Associate projects and activities for to an asset for manual capitalization.
Assign Transactions to Assets Page	PC_AM_RES_SUM	(For Classic page users only) You can view the list of assets or profiles that are related to a project, and drill down into the asset or profile to assign transactions.
Assign Transactions Page	PC_AM_RESOURCES	(For Classic page users only) Assign or clear transactions to a profile or asset. View transactions that are eligible for asset assignment.
Define Filter Criteria - Standard 1 Page	PC_SEL_CRITERIA1	(For Classic page users only) Define selection criteria for date, activity, and transaction fields.
Define Filter Criteria - Standard 2 Page	PC_SEL_CRITERIA2	(For Classic page users only) Define selection criteria for department, activity location, and asset profile. This is an extension of the Define Filter Criteria - Standard 1 page.
Define Filter Criteria - Custom Page	PC_SEL_CRITERIA3	(For Classic page users only) Include or exclude transaction fields from the criteria definition.
Relate Assets to Activities Page	PC_AMPC_REL_FL	Associate assets with specific projects and activities using fluid.
Assign Cost to Asset Page	PC_AM_CAP_CRIT_FL	Define criteria for assigning project transactions and process updates to assign transactions to specific assets using fluid.
Asset Capitalization Template Page	PC_AM_CAP_TPL_FL	Define templates with predefined criteria for assigning cost to assets using fluid.

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Asset Profile Page

Use the Asset Profile page (PROFILE_DEFN_PC) to create asset profiles in PeopleSoft Project Costing if you do not use PeopleSoft Asset Management.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Asset Profile**

Define templates that contain standard depreciation criteria for an asset type and its corresponding asset books.

Asset profiles are discussed in the Asset Profiles and the Asset Profile Page topics.

Project Costing Options - Asset Integration Rules Page

Use the Project Costing Options - Asset Integration Rules page (PC_AM_RULE_BU) to set up integration with PeopleSoft Asset Management at the business unit level.

Navigation:

Setup Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Project Costing Options**

Select the **Asset Integration Rules** tab.

To enable the manual asset integration processes to create assets from the business unit's project activities:

1. Select **Enable Integration** in the **Asset Integration Defaults** group box.
2. Select an integration type of **Capitalization.**
3. Select an asset identification rule of **Manual Identification.**

After you select the manual identification rule on the Asset Integration Rules page you will perform other manual steps to define assets, relate assets to projects, and assign transactions to assets. After those manual steps are complete, the values that you specify on this page for timing triggers, asset location source, destination of asset rows, and asset adjustment rules can be used for the manual capitalization process.

Define Assets Page

Use the Define Assets page (PC_AM_DEFN) to specify basic information about a project asset.

Navigation:

Project Costing, and then **Assets**, and then **Define Assets**, and then **Define Assets**

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

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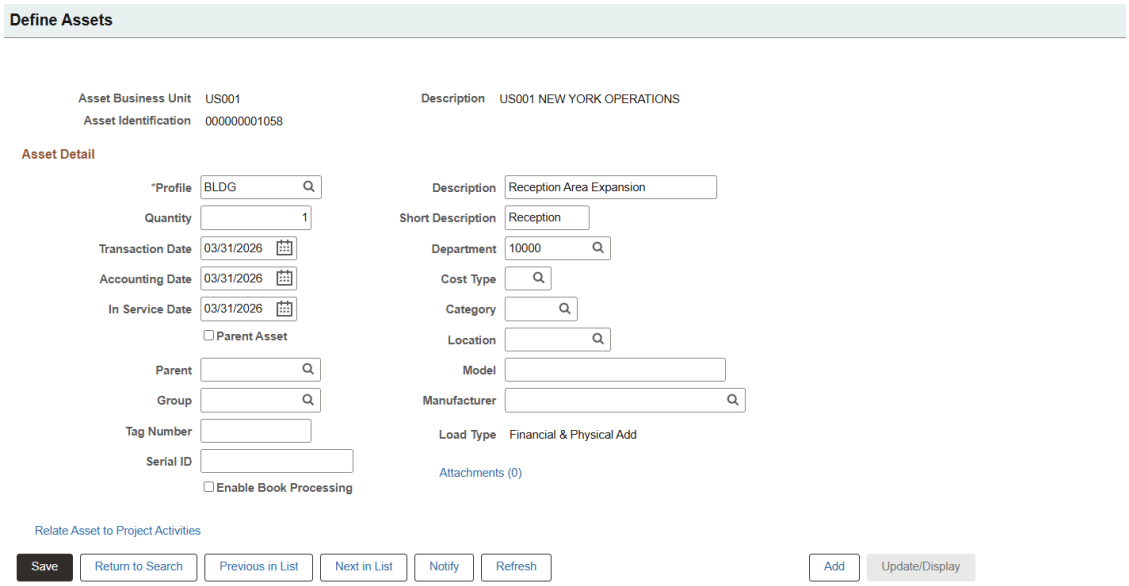

Some of the fields that appear in this topic are defined in the Common Elements Used to Manage Assets topic.

> **Note**
>
> PeopleSoft Project Costing can create capitalized rows and distribute them without integrating with PeopleSoft Asset Management. You can use the PeopleSoft Asset Management Loader tables, but you must create a custom process that PeopleSoft does not support to extract data from the tables.

When an asset definition is created in PeopleSoft Asset Management, information such as depreciation method, useful life, category, or group asset ID are inherited from the asset profile. You can override default values from the profile on this page.

Field or Control	Description
Transaction Date	Enter the date that the asset transaction occurs. This date is used as the default value for the transaction date override on the Manual Capitalization Review page. The transaction date of an adjustment that you make after an asset is created must be equal to or greater than the previous transaction date.
Accounting Date	Enter the date for which the asset transaction is accounted. This date is used as the default value for the accounting date override on the Manual Capitalization Review page.
Parent Asset	Select to indicate the asset as a parent asset.

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Field or Control	Description
Cost Type	Enter the cost type for the asset. The Cost Type field (COST_TYPE) resides in the Project Transaction table as well as in the PeopleSoft Payables and PeopleSoft Purchasing systems that feed data to PeopleSoft Project Costing. Breakdown by cost type can occur for assets that are created from those transaction rows if the installation option **Cost Type from Transaction** is selected. If the **Cost Type from Transaction** installation option is not selected, only the cost type that you enter in this field is included with the asset. **Note:** To ensure data integrity in PeopleSoft Asset Management, after you specify the **Cost Type from Transaction** option during installation, do not change it.
Model	Enter the model identifier that is assigned to the asset.
Load Type	Displays the transaction load type that PeopleSoft Asset Management uses to determine the types of transactions that occur when the Load Transaction into Asset Management process loads rows into the Asset transaction tables.
Interface Status	Displays the status of the integration from PeopleSoft Project Costing to Asset Management, such as *Pending* or *Generated.*
Enable Book Processing	Select to enable the asset's transaction costs to be tracked by book in the PeopleSoft Asset Management system.
Attachments	Click to access the Define Asset Attachments page where you can add/ remove attachments. The number of attachments added to an asset is displayed next to the Attachments link. **Note:** For PeopleTools release 8.59 and later, you can select multiple files (maximum limit is 20) at a time to be included as attachments.
Relate Asset to Project Activities	Select to open Relate Assets to Activities Page to associate assets with projects and its activities.

Related Topics

- Asset Lifecycle Management Fundamentals: Defining Financial Processing for PeopleSoft Asset Management
- PeopleSoft Asset Management: Maintaining Asset Book Information

Capitalizing Assets in the Early Phases of Projects

This topic applies to the Classic page users only.

Costs that a project incurs can be depreciated during the early phases of a project's life cycle even before you know exactly what assets the project will create. By using the Summarize by Profile feature in PeopleSoft Project Costing to integrate with PeopleSoft Asset Management,

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the system automatically reverses profile summaries and creates permanent assets when you process the actual asset information.

To set up this integration process:

1. Create a project and a work breakdown structure (WBS) that contains one or more activities.

   You must select an asset identification rule of **Manual Identification** on the Asset Integration Rules page.

2. Define a temporary asset by using the Define Assets page.

   When you define the permanent asset, assign the same asset profile to the permanent asset as you assign to the temporary asset.

3. Relate the temporary asset to the appropriate project activities.

   You must select a **Summarization Type** of *By Profile* on the Relate by Project page or Relate by Asset page.

4. Accumulate transaction costs against the project activities.

   Transactions with an analysis type that belongs to the *PRECL* (PC to AM Profile Summary) analysis group are eligible for assignment during this process.

5. Assign transactions to the temporary asset.

   You must select an **Assign Type** of *Profile* on the Assign Transactions to Assets page.

6. Run the Send to Asset Management process.

   You must select a **Summarize Type** of *By Profile* on the Send to Asset Management page.

Use the manual capitalization process when you are ready to capitalize the permanent asset. On the Relate by Project page, select a summarization type of *By Asset.* On the Assign Transactions to Assets page, select an assign type of *Asset.*

Before you run the Send to Asset Management process you must change the accounting date of the temporary asset to match the accounting date of the permanent assets. Additionally, you must change the transaction date of the permanent assets to match the original transaction date of the temporary asset. This ensures that the system reverses the temporary asset capitalized value and uses the correct final capitalized amount to create the permanent assets.

Relate by Project Page

This topic applies to the Classic page users only.

Use the Relate by Project page (PC_PCAM_DEFN) to associate assets with a specific project.

Navigation:

Project Costing, and then **Assets**, and then **Relate by Project**, and then **Relate Asset to Project**

> **Note**
>
> You can relate a single asset to multiple projects and activities.

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

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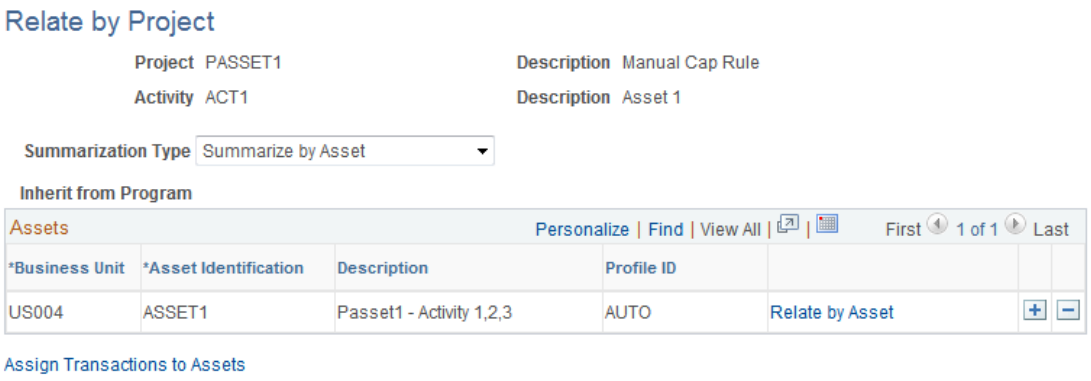

This page displays a project's view of the data. Add rows to associate the project activity with additional assets.

Field or Control	Description
Summarization Type	Select whether to summarize *By Asset* or *By Profile*.
Relate by Asset	Click the **Relate by Asset** link after saving a row to access the Relate by Asset page, which provides a different view of the relationship between the project and asset.
Assign Transactions to Assets	Click to access the Assign Transactions to Assets page, which contains a list of assets for assignment to transactions.

Relate by Asset Page

This topic applies to the Classic page users only.

Use the Relate by Asset page to associate projects and activities to an asset for manual capitalization.

Navigation:

Project Costing, and then **Assets**, and then **Relate by Project**, and then **Relate by Project**. Click the **Relate by Asset** link on the Relate by Project page

> **Note**
>
> You can relate a single asset to multiple projects and activities.

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

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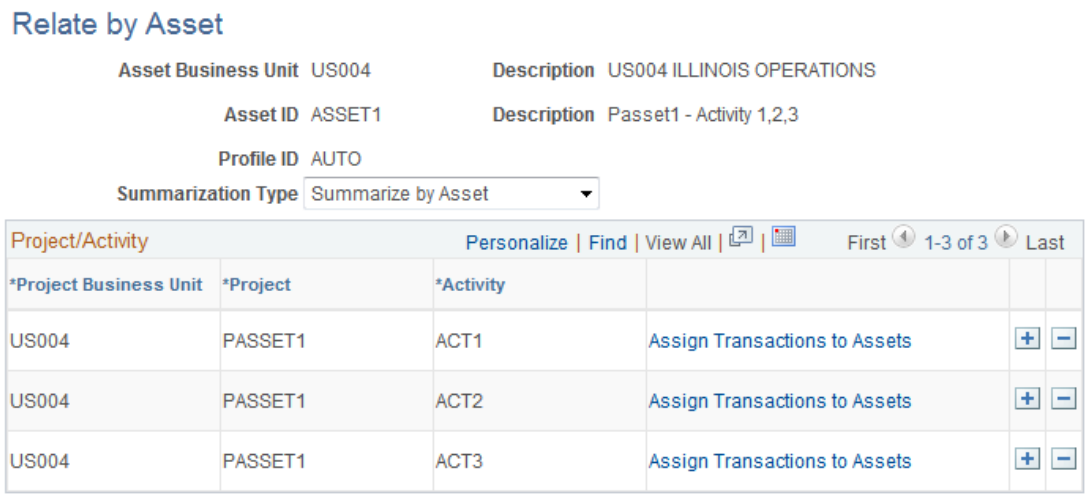


This page displays an asset's view of the data and it is used to associate an asset with project activities. Add rows to associate the asset with additional project activities.

Field or Control	Description
Assign Transactions to Assets	Click to access the Assign Transactions to Assets page, which contains a list of assets for assignment to transactions. This link appears when you save the row.

Assign Transactions to Assets Page

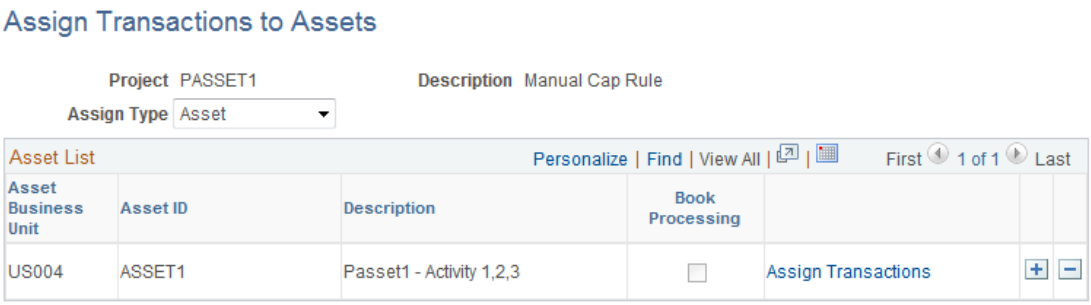
This topic applies to the Classic page users only.

Use the Assign Transactions to Assets page (PC_AM_RES_SUM) to view the list of assets or profiles that are related to a project, and drill down into the asset or profile to assign transactions.

Navigation:

Project Costing, and then **Assets**, and then **Assign Transactions to Assets**, and then **Assign Transactions to Assets**

This example illustrates the fields and controls on the Assign Transactions to Assets page. You can find definitions for the fields and controls later on this page.



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Projects appear on this page if the project's asset identification rule is **Manual Identification** on the Asset Integration Rules page.

Field or Control	Description
Assign Type	Select *Asset* or *Profile*. These options determine the fields that appear on the asset list rows. *Retire* appears as the assign type if the project has an integration type of Retirement on the Asset Integration Rules page.
Book Processing	Displays the value that is inherited from the **Enable Book Processing** field on the Define Assets page.
Save	Click to enable the **Assign Transactions** link.
Assign Transactions	Click to access the Assign Transactions page where you can complete the transaction assignment process. This link is available after you save the row.

Assign Transactions Page

This topic applies to the Classic page users only.

Use the Assign Transactions page (PC_AM_RESOURCES) to assign or clear transactions to a profile or asset.

View transactions that are eligible for asset assignment.

Navigation:

Click the **Assign Transactions** link on the Assign Transactions to Assets page after you save the row.

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

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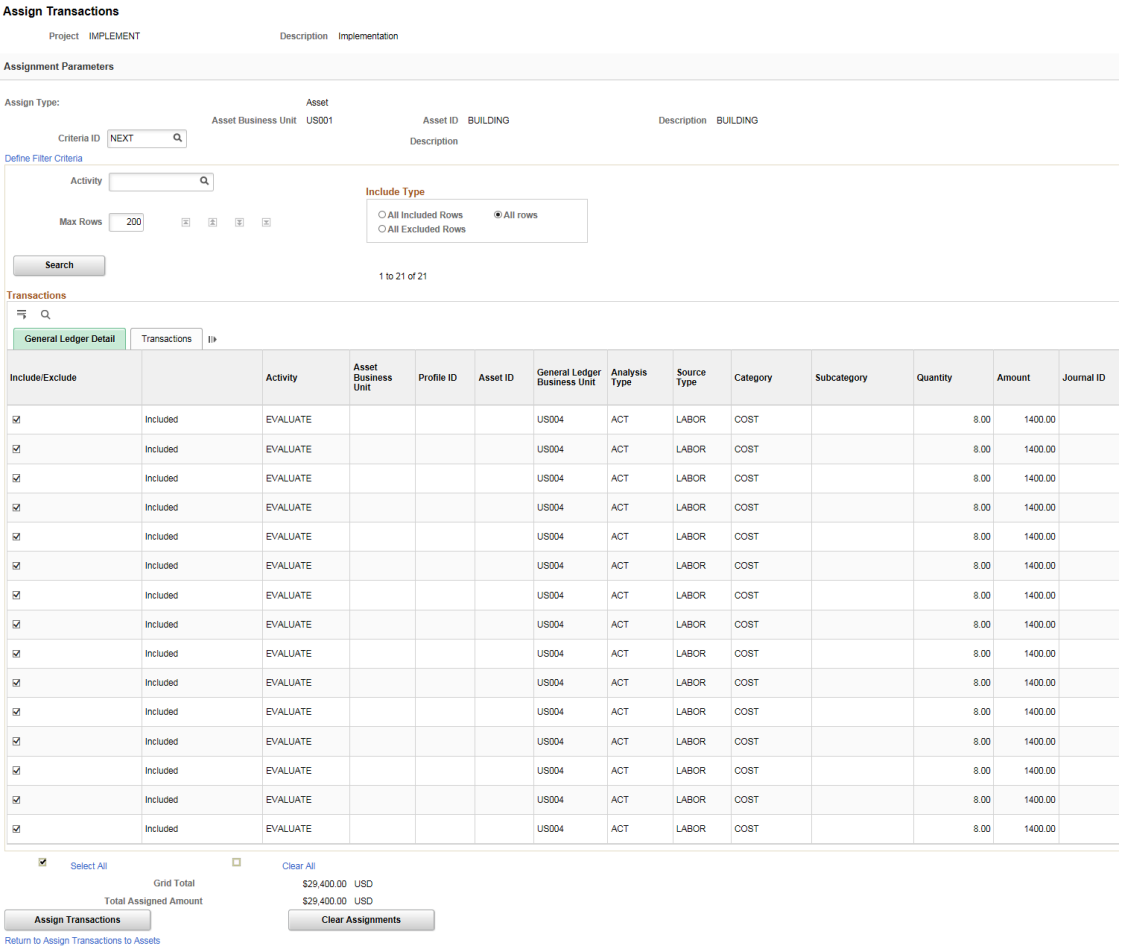

Use this page to:

- Assign a group of transactions to a profile or an asset.
- Clear a group of transactions from the profile or asset.
- View transactions that are eligible or ineligible for asset assignment based on specific criteria.
- Selectively override the criteria for individual transactions.

Field or Control	Description
Criteria ID	Select a value or create a new criteria ID. To create a new ID, either enter a new ID or keep the default value of *NEXT* and let the system assign the criteria ID.

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Field or Control	Description
Define Filter Criteria	Click to access the Selection Criteria component, where you can view and edit existing filter criteria that determine which project activity costs to include in the asset. **Note:** The system determines which transactions are eligible for assignment based on the filter criteria and the value of the Asset Management Distribution Status field . Only transactions that have not been distributed to PeopleSoft Asset Management are eligible for assignment by using the Assign Transactions page. Transactions with an Asset Management distribution status value of *D* (distributed) are not eligible for assignment.
Activity	Enter an activity to display only the transactions that are associated with the specified activity. To display all transactions that are associated with the project, leave the **Activity** field blank.
Max Rows (maximum rows)	Enter the maximum number of rows to appear in the **Transactions** grid. This may result in fewer rows appearing in the grid than the number of transactions that are actually assigned to the asset.
Include Type	Select a filter that operates in conjunction with the **Activity** and **Max Rows** fields to determine the rows that appear in the grid. Available options are: *All Included Rows:* Displays transactions that meet the selection criteria and any manually included rows to be processed. *All Excluded Rows:* Displays transactions that do not meet the criteria or are manually excluded and are not to be processed. *All Rows:* Displays all transactions that meet the selection criteria.
Search	Click to retrieve all transactions that match the selected criteria and **Include Type** option.

> **Note**
>
> The **Activity, Max Rows,** and **and Include Type** fields define only which rows appear in the grid. These fields are used for viewing only, whereas the **Criteria ID** field is used to filter rows. For example, assume that the filter criteria returns transaction rows with activities of PLAN, DEVELOP, and BUILD. You can enter a value of *PLAN* in the **Activity** field to view only the transaction rows in the PLAN activity. If you click the **Assign Transactions** button, the system stamps the asset information on all transactions from the PLAN, DEVELOP, and BUILD activities that the system returned based on the criteria ID.

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Field or Control	Description
Include/Exclude	Select check box to include or exclude transactions for asset capitalization. Initially when transactions are loaded for the first time, the *Include/Exclude* check box is selected by default for all transactions. After changes are done and saved for this field, the values are retained. In the subsequent column corresponding status will be displayed.
Save	Click to store the selections that are on this page.

> **Warning**
>
> You must save the selections on this page before you click the **Assign Transactions** or **Clear Assignments** buttons. Otherwise, you will lose any unsaved actions when the assign or clear event occurs.

Field or Control	Description
Grid Total	Displays the total value based on the Transactions grid output.
Total Assigned Amount	Displays the total amount that will be assigned for capitalization.
Assign Transactions	Click to assign and stamp an asset business unit, profile ID, and asset ID in the Project Transaction table for eligible transactions. This process defines how the system distributes project costs to assets. **Note:** When you click the **Assign** button, the system stamps and assigns all eligible rows, not just rows that are visible in the **Transactions** grid. You must relate assigned rows to the asset before they can be used to create an asset. You can assign a row then relate it to the asset after the asset is already created. Rows that are sent to an existing asset are treated as adjustments in the asset management system. **Note:** This button is not applicable for all rows excluded from processing.
Clear Assignments	Click to clear the asset business unit, profile ID, and asset ID from the grouped transactions. **Note:** This button is not applicable for all rows excluded from processing.

Apart from the fields included for General Ledger Detail, there are additional fields such as Voucher, Supplier ID, PO ID, Report ID, Time Report ID, Work Order, Empl ID, and Invoice included for Transactions. Click the Transactions tab to access these fields.

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> **Note**
>
> If an activity has transactions with a pending action, no additional transactions can be assigned to that activity until the pending transactions are interface to Asset Management. In other words, you must interface pending transactions to Asset Management before assigning additional transactions to the same activity.

Define Filter Criteria - Standard 1 Page

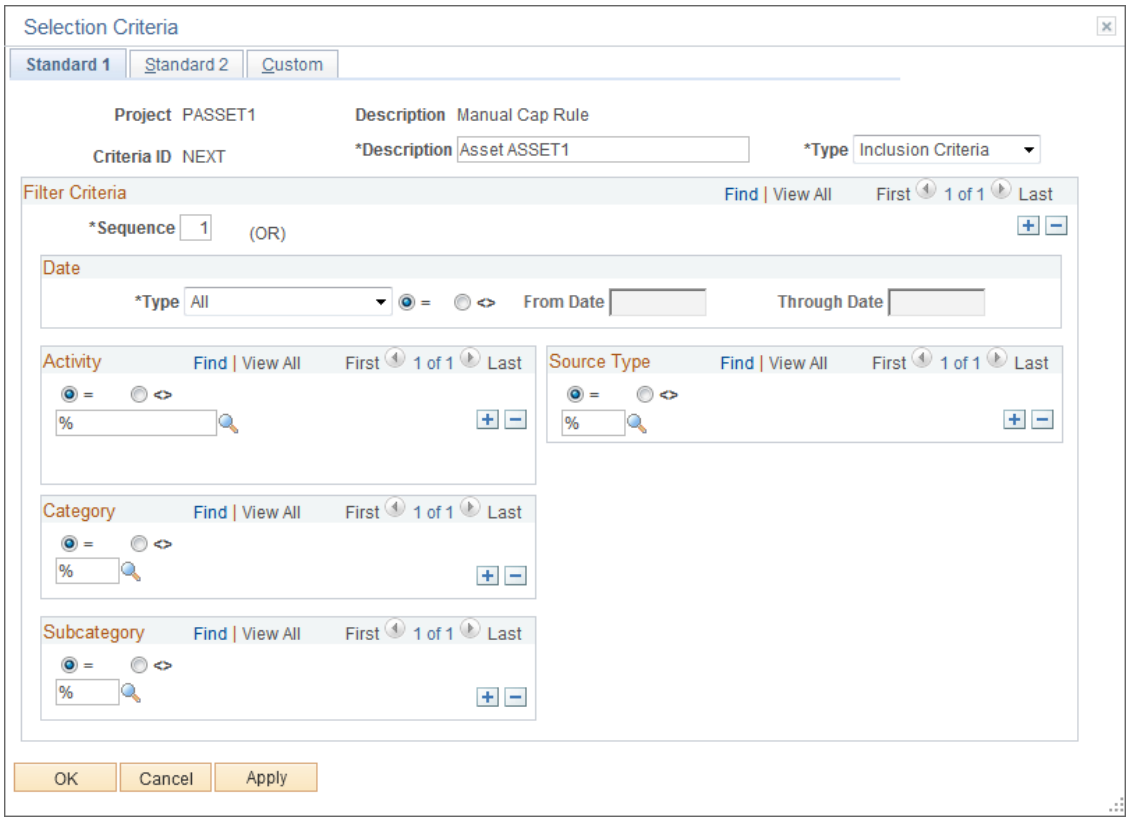
This topic applies to the Classic page users only.

Use the Define Filter Criteria - Standard 1 page (PC_SEL_CRITERIA1) to define selection criteria for date, activity, and transaction fields.

Navigation:

Click the **Define Filter Criteria** link on the Assign Transactions page.

This example illustrates the fields and controls on the Define Filter Criteria - Standard 1 page. You can find definitions for the fields and controls later on this page.



Define criteria to determine what transactions are eligible to select transactions for asset assignment. You must define filter criteria each time that you create a new project for the manual capitalization process. The system stores manual capitalization filters at the project level, and the express capitalization filters at the project business unit level.

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Field or Control	Description
Type (criteria)	Choose to *Include* or *Exclude* transactions that meet the criteria.
Sequence	Enter the sequence number. A row that does not meet the criteria that is in sequence 1 is still included if it meets the criteria in a subsequent sequence. For each sequence, all field values must be met for the system to include a transaction row.
Type (date)	Select *Accounting Date, Transaction Date,* or the default value of *All.*
= or <>	Choose the operand to specify if transactions are included in the selection criteria if their date is equal to (=) or not equal to (<>) the selected date range.
From Date and **Through Date**	Select a date range if the date type is *Accounting Date* or *Transaction Date.* These fields are not available if you select a date type of *All.*
Activity, Source Type, Category, and **Subcategory**	Select operands and enter valid values for this project.

Define Filter Criteria - Standard 2 Page

This topic applies to the Classic page users only.

Use the Define Filter Criteria - Standard 2 page (PC_SEL_CRITERIA2) to define selection criteria for department, activity location, and asset profile.

This is an extension of the Define Filter Criteria - Standard 1 page.

Navigation:

Select the **Standard 2** tab on the Define Filter Criteria - Standard 1 page.

This example illustrates the fields and controls on the Define Filter Criteria - Standard 2 page. You can find definitions for the fields and controls later on this page.

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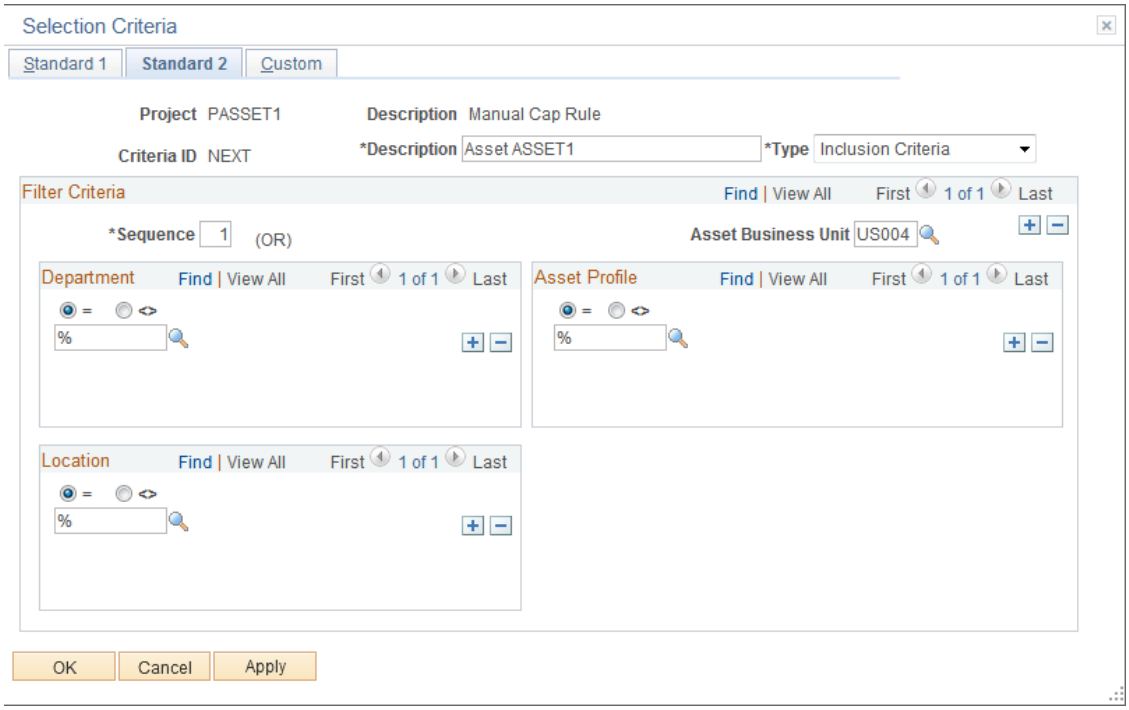

Field or Control	Description
Description (criteria)	Enter a description in the field or leave the default description from the Define Filter Criteria - Standard 1 page.
Department	Select from the list of departments that are defined for this business unit and project.
Location	Specify the location of each activity when defining the activity. This field refers to the location of the activity, not the location of the asset in PeopleSoft Asset Management. If you exclude location from the selection criteria, the system excludes all transactions that are associated with the activity.
Asset Profile	Select from the list of asset profiles that are based on the value in the **Asset Business Unit** field.

Define Filter Criteria - Custom Page

This topic applies to the Classic page users only.

Use the Define Filter Criteria - Custom page (PC_SEL_CRITERIA3) to include or exclude transaction fields from the criteria definition.

Navigation:

Select the **Custom** tab on the Define Filter Criteria - Standard 1 or Standard 2 page.

This example illustrates the fields and controls on the Define Filter Criteria - Custom page. You can find definitions for the fields and controls later on this page.

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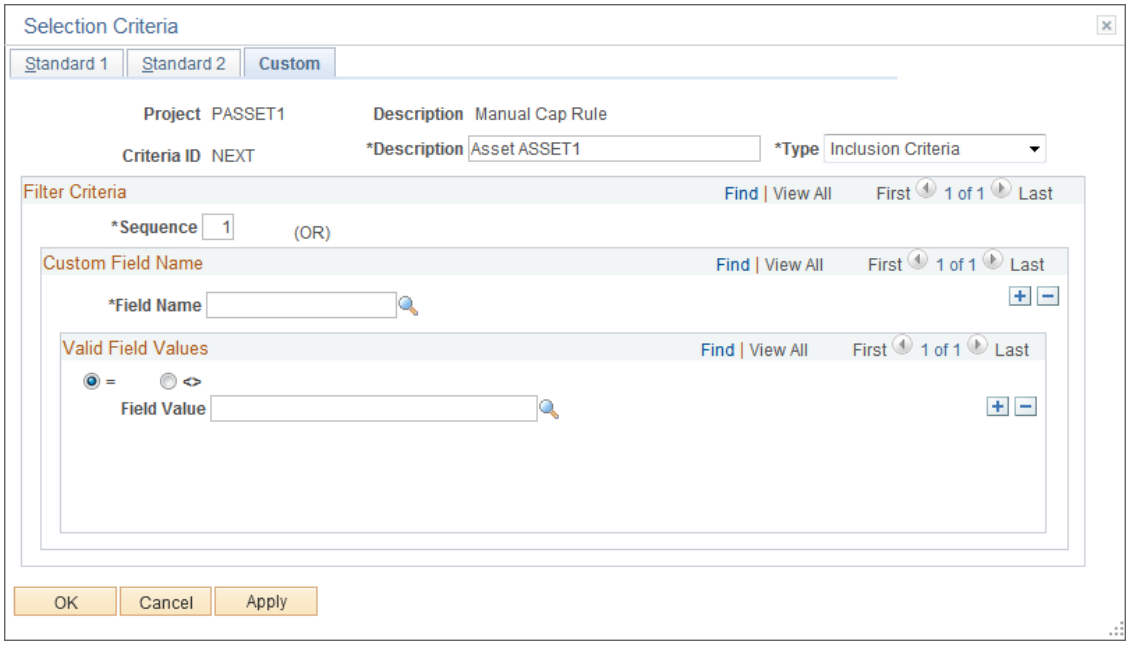

Field or Control	Description
Custom Field Name	Select a field from the drop-down list box that is unique from the fields that are available on the Define Filter Criteria - Standard 1 and Standard 2 pages.
Valid Field Values	Select the operand to specify if the field name and its associated value is included (=) or excluded (<>) from the definition.

Related Topics

- Assign Transactions Page
  This topic applies to the Classic page users only.

Relate Assets to Activities Page

Use the Relate Assets to Activities page (PC_AMPC_REL_FL) to associate assets with specific projects and activities.

Navigation:

My Home landing page, and then **Project Assets navigation collection**, and then **Relate Assets to Activities**

This example illustrates the fields and controls on the Relate Assets to Activities page.

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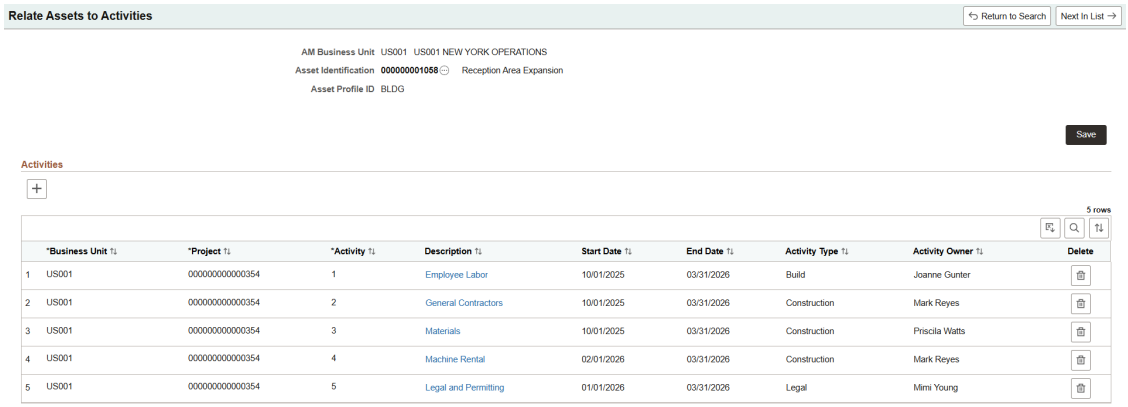

Users can add a Project and its activities to an asset. An asset is generally linked to one project and one or more activities of the project. A single project activity can be associated with multiple assets.

The asset can be linked to multiple projects when program projects are being used.

Select **Save** to link the activities to the asset.

Select the three dots icon next to the **Asset Identification** number to open the **Actions** menu. Users can navigate to the **Assign Cost to Asset** page using the Actions menu.

Assign Cost to Asset Page

Use the Assign Cost to Asset page (PC_AM_CAP_CRIT_FL) to define a criteria for assigning transaction cost to an asset.

Navigation:

My Home landing page, and then **Project Assets navigation collection**, and then **Assign Cost to Asset**

This page can also be accessed from the action icon next to the Asset ID on the **Relate Asset to Activities page**.

This example illustrates the fields and controls on the Assign Cost to Asset page.

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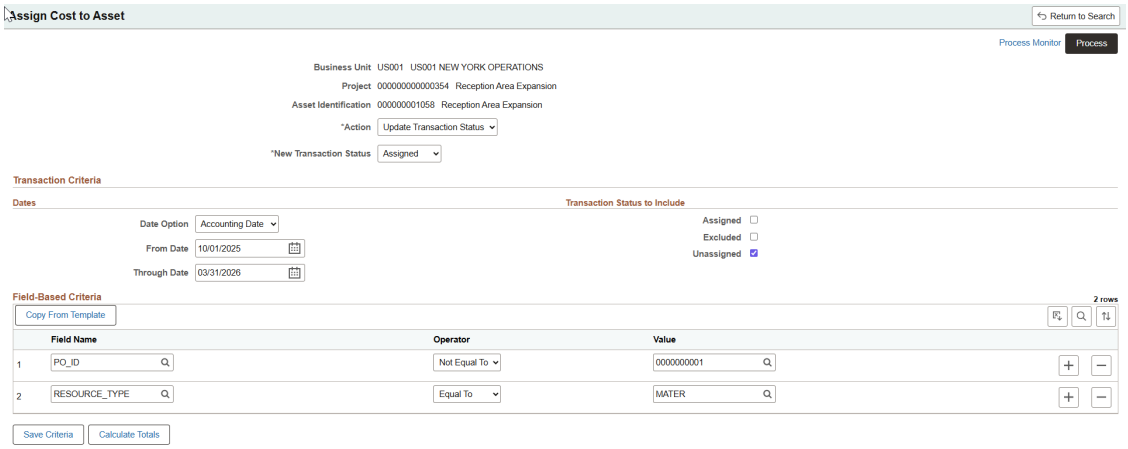

Users can review and update the transactions using the **Actions** field. The **Review Transaction Detail** option allows you to run the process and review an excel file detailing the transactions that meet the criteria on the page.

Select **Update Transaction Status** and the **New Transaction Status** to update transactions meeting criteria with a new status. Transaction status can be updated to *Assigned, Excluded* or *Unassigned*.

The From Date and *Through Date* are default dates from the **Define Project General Info** page.

The **Transaction Status to include** is set to **Unassigned** by default since this page is primarily used to update unassigned transactions. This includes the transactions with AM distribution statuses with *N* or blank which means it is not yet assigned to an asset.

Select **Excluded** to review and update transactions with AM distribution statuses set to *I* or *Ignore*.

Select **Assigned** to include transactions with AM distribution status set to *Y*.

The **Field Based Criteria** allows users to add multiple fields from PROJ_RESOURCE and use operators to work with the entered values. The system evaluates all criteria and updates the AM Distribution status for only those transactions that meet all the listed criteria.

Use the **Copy From Template** button to import predefined criteria from the Asset Capitalization Template page. This replaces any existing criteria with the imported criteria.

Select the **Calculate Totals** to apply the criteria to PROJ_RESOURCE and display the total value to the user.

Select **Process** and an application engine will update rows that meet criteria and generate an excel file showing the updated information in Report Manager.

> **Note**
>
> If a process running for a specific project and you try to request another, a warning is displayed to wait until the process is done.

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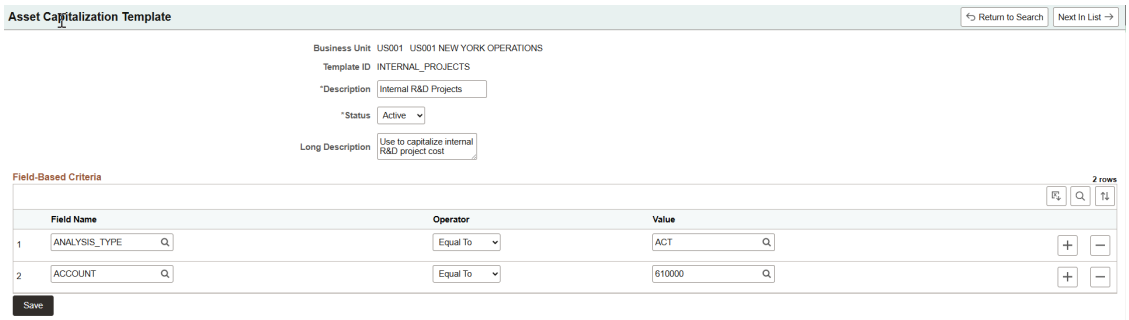
Asset Capitalization Template Page

Use the Asset Capitalization Templates page (PC_AM_CAP_TPL_FL) to define templates with predefined criteria for assigning costs to assets. Criteria templates are created by business unit and may be used as a starting point for criteria on specific assets.

Navigation:

My Home landing page, and then **Project Assets navigation collection**, and then **Asset Capitalization Template**

This example illustrates the fields and controls on the Asset Capitalization Template page.



Use the **Field-Based Criteria** to define your template.

Users can add any fields from the Project Transaction table (PROJ_RESOURCE) to include in the criteria.

The **Operator** field provides *Equal to*, *Not Equal to*, *In*, and *Not In* as options to control the values entered.

You can add comma separated multiple values in one field when using *In* and *Not In* operators.

Use the **Status** field to make the template active or inactive.

Running the Manual Capitalization Process

This topic discusses how to initiate the manual capitalization process.

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Page Used to Run the Manual Capitalization Process

Page Name	Definition Name	Usage
Send to Asset Management Page	RUN_PC_AM	Run the Send to Asset Management process to send information from PeopleSoft Project Costing to Asset Management and capitalize project assets.

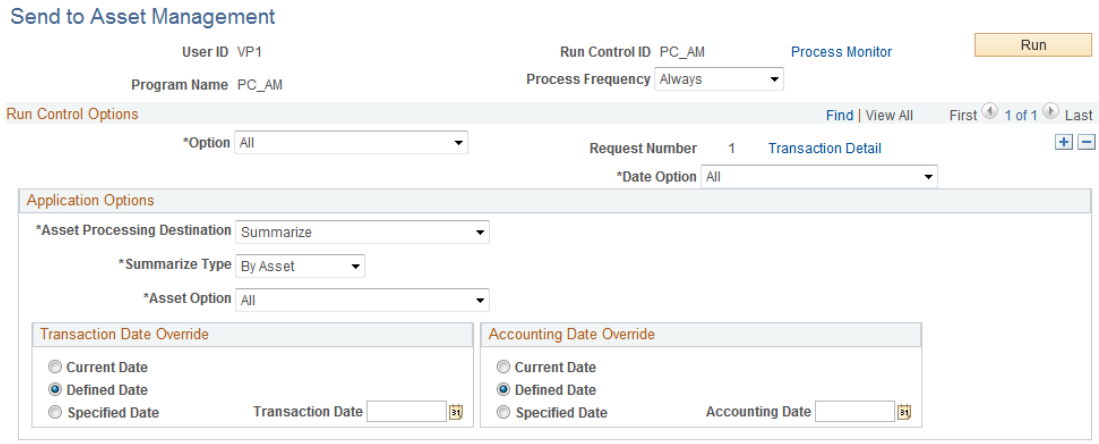
Send to Asset Management Page

Use the Send to Asset Management page (RUN_PC_AM) to run the Send to Asset Management process to send information from PeopleSoft Project Costing to Asset Management and capitalize project assets.

Navigation:

Project Costing, and then **Assets**, and then **Sent Assets to AM**

This example illustrates the fields and controls on the Send to Asset Management page. You can find definitions for the fields and controls later on this page.



Run the Send to Asset Management process periodically to send information to PeopleSoft Asset Management.

You must use this page if you want to summarize transactions by profile, or process asset information at the book level.

Based on asset integration rules and the options that you select on this page, the process can accomplish these tasks that are associated with capitalizing project assets:

- Summarize transactions by profile or asset.
- Populate PeopleSoft Asset Management Loader tables with summarized profile or asset data.
- Reverse summarized profiles when summarizing by asset, if needed.

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Field or Control	Description
Option	Select an option to run the process for all activities or for specific ones. Available options are: *All:* Brings in transactions that are associated with all activities. *Business Unit:* Specifies transactions that are for the selected business unit. *Business Unit/Project:* Specifies transactions that are for the selected business unit and project. *Business Unit/Project/Activity:* Specifies transactions that are for the selected business unit, project, and activity.
Asset Processing Destination	Select the option that determines how far the asset data flows into PeopleSoft Asset Management when you click **Send to Asset Management.** If you require asset approval before sending assets to PeopleSoft Asset Management, the available options are: *Run Interface* *Run Interface and Load* *Summarize* If you do not require asset approval before sending assets to PeopleSoft Asset Management, the available options are: *Run Interface* *Run Interface and Load* *Sum, Run and Load Transactions* *Summarize* *Summarize and Run Interface* Asset processing destination options are discussed in the Understanding Asset Capitalization Processes, Common Elements Used to Manage Assets topic.
Summarize Type	Specify a summary type if one of the summarize run options is selected. This determines how the process summarizes transactions. *By Profile:* Select to summarize all transactions with the same profile. Transactions with an analysis type that belongs to the *PRECL* analysis group are eligible for this process. **Note:** You do not have to summarize by profile in order to summarize by asset. *By Asset:* Select to summarize all transactions with the same asset ID. Transactions with an analysis type that belongs to the *CLOSE* analysis group are eligible for this process.

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> **Note**
>
> You can modify which costs are included in the summarization by adding analysis types to analysis groups.

Field or Control	Description
Asset Option	Select from these options to further define the process: *All:* Select to process all transactions that are associated with assets or profiles. *Selected AM Unit:* Select to process all transactions that are associated with assets or profiles that belong to a specific asset business unit. *Selected AM Unit / Asset ID:* Select to process transactions that are associated with a specific asset ID and asset business unit.

If data does not load into any of the PeopleSoft Asset Management production tables after you run the integration process, check for these possibilities:

- You cannot send acquisition detail for group assets to PeopleSoft Asset Management.

  Group assets coming from PeopleSoft Project Costing should not have acquisition detail functionality.
- If the system does not load cost rows into the asset management system, verify that the **Group Asset Processing** option is selected on Installation Options - Asset Management page (INSTALLATION_AM).

  The cost rows for group assets load only if this option is selected.

> **Note**
>
> PeopleSoft Project Costing does not perform open period validation when sending transactions to PeopleSoft Asset Management.

See the product documentation for *PeopleTools: Process Scheduler*

Related Topics

- Asset Lifecycle Management Fundamentals: Previewing Data in the Loader Tables
- Application Fundamentals: Installation Options - Asset Management Page

Reviewing and Approving Assets

You can review and approve asset transactions before transferring them to the asset management system when you create or adjust assets in PeopleSoft Project Costing.

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> **Note**
>
> The pages discussed in this topic apply only to assets that you create or adjust in PeopleSoft Project Costing. The Approve Review Assets component does not apply to asset retirement transactions.

Pages Used to Review and Approve Assets

Page Name	Definition Name	Usage
Review Assets Page	PC_AM_APPROVE	Search for asset transaction rows to send to PeopleSoft Asset Management, hold for later processing, or reject for the capitalization process.
Integration Summary Page	PC_AM_APPRV_ASSTS	Review summarized amounts for assets that met the search criteria on the Review Assets page and select rows to process.
Integration Detail Page	PC_AM_PND_ASSTS2	Analyze detail (nonsummarized) transaction rows in the PC to AM Staging table that have not been sent to PeopleSoft Asset Management.
Integration Detail Page	PC_AM_PND_ASSTS1	Analyze detail (nonsummarized) transaction rows in the PC to AM Staging table that have not been sent to PeopleSoft Asset Management. This page appears if you use book processing and includes a book scroll area.

Review Assets Page

Use the Review Assets page (PC_AM_APPROVE) to search for asset transaction rows to send to PeopleSoft Asset Management, hold for later processing, or reject for the capitalization process.

Navigation:

Project Costing, and then **Assets**, and then **Review Assets**, and then **Review Assets**

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

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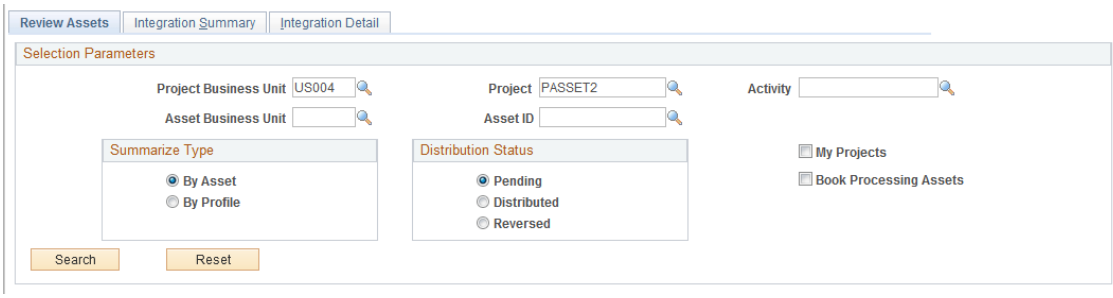

Enter search criteria to retrieve the list of assets that you want to review. You must select at least one of these fields:

- **Project Business Unit**
- **Asset Business Unit**
- **My Projects**

Field or Control	Description
Project Business Unit	Enter a project business unit to limit the assets retrieved to those related to the specified value.
Project	Enter a project to limit the assets retrieved to those related to the specified value. Available projects are based on the project business unit.
Activity	Enter an activity to limit the assets retrieved to those related to the specified value. Available activities are based on the project.
Asset Business Unit	Enter an asset business unit to limit the assets retrieved to those related to the specified value.
Asset ID	Enter an asset ID to limit the assets retrieved to those related to the specified value. Available activities are based on the asset business unit.
My Projects	Select to retrieve assets that are listed in your My Projects page.
Book Processing Assets	Select to retrieve assets that you are creating by using PeopleSoft Project Costing's book processing functionality.
Search	Click to access the Integration Summary page where rows that meet your search criteria appear in the **Approve Assets** grid.
Reset	Click to clear the search parameters on this page except for **Summarize Type,** and to clear all grids in the Approve Review Assets component.

Summarize Type

Select to limit the assets retrieved to those that are either summarized by asset or summarized by profile. The default value is **By Asset.**

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Distribution Status

Field or Control	Description
Pending	Select to limit the assets retrieved to those that have been summarized in the PC to AM Staging table. This is the default value.
Distributed	Select to limit the assets retrieved to those that have been distributed to PeopleSoft Asset Management.
Reversed	Select to limit the assets retrieved to those that were previously sent to PeopleSoft Asset Management and subsequently reversed.

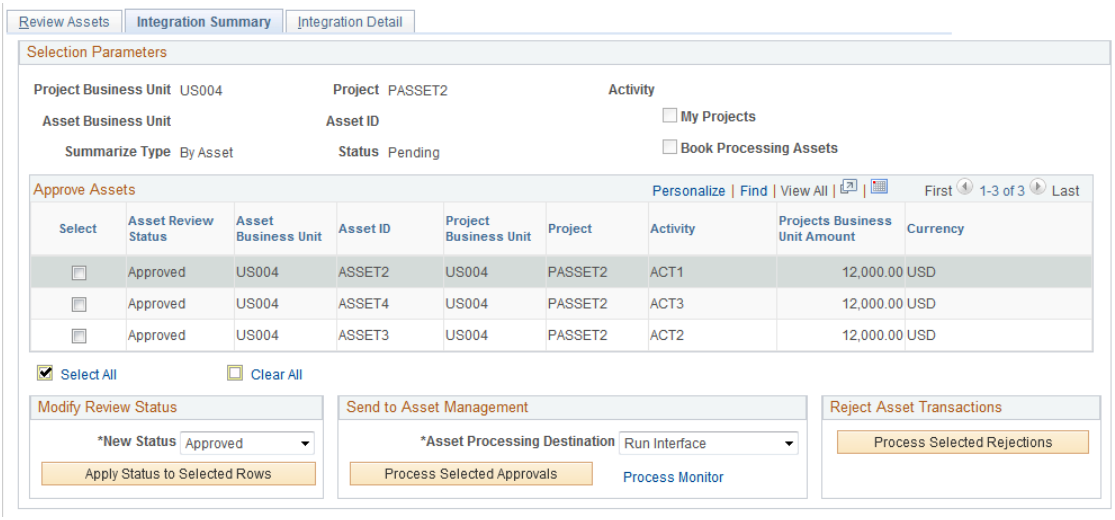
Integration Summary Page

Use the Integration Summary page (PC_AM_APPRV_ASSTS) to review summarized amounts for assets that met the search criteria on the Review Assets page and select rows to process.

Navigation:

Project Costing, and then **Assets**, and then **Review Assets**, and then **Integration Summary**

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



The selection criteria from the Review Assets page appears at the top of this page. If you use project level security, the system retrieves only the projects to which you have security access. If you don't use project level security, the system returns all projects that match the search criteria. Additionally, using PeopleTools security, you can grant full access to this page to users who approve and reject assets, and grant read-only access to users who need to enter search parameters and retrieve data, but do not need to change asset status or run the integration process.

Assets that are associated with inactive projects appear as read-only rows on this page.

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Approve Assets

Asset transaction rows have an interface status of *New* when they are first sent to the PC to AM Staging table. If assets require approval prior to sending them to PeopleSoft Asset Management, rows with a *New* status will not be sent to the PeopleSoft Asset Management Loader tables until the interface status is Approved.

If assets do not require approval prior to sending them to PeopleSoft Asset Management, the system assigns an Approved status to asset transaction rows when they are first sent to the PC to AM Staging table.

Field or Control	Description
Asset Review Status	Displays the existing status of transaction rows when you enter the page. Possible values are: *Approved:* The transaction is reviewed and ready to send to PeopleSoft Asset Management. This value may appear if you selected a *Pending* distribution status on the Review Assets page. *Distributed:* The transaction has been successfully sent to PeopleSoft Asset Management. This value may appear if you selected a *Distributed* distribution status on the Review Assets page. *New:* Status of rows when they first enter the PC to AM Staging table. Rows with a New status are not processed further if you require asset approval prior to sending them to PeopleSoft Asset Management. This value may appear if you selected a *Pending* distribution status on the Review Assets page. **Note:** You cannot change an asset review status to New from any other status. Use the Hold status if you want to prevent rows from being processed further. *Hold:* Review of the data is started, but the transaction is not yet approved. This value may appear if you selected a *Pending* distribution status on the Review Assets page. *Reject:* The transaction is rejected and will not be sent to PeopleSoft Asset Management. This value may appear if you selected a *Pending* distribution status on the Review Assets page. *Reverse:* Send an offset row to PeopleSoft Asset Management to reverse an erroneous transaction. This value may appear if you selected a *Distributed* distribution status on the Review Assets page. *Reversed:* An offsetting reversal has been sent to PeopleSoft Asset Management. You cannot process rows with a *Reversed* asset review status. This value appears if you selected a *Reversed* distribution status on the Review Assets page.
Asset Business Unit, Asset ID, Project Business Unit, Project, and **Activity**	Displays transaction key values showing the relationship of an asset to a project activity. The data on this page will be summarized to these five key fields.

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Field or Control	Description
Projects Business Unit Amount	Displays the dollar amount in the base currency for the project business unit.
Currency	Displays the base currency code for the project business unit.
Default Book	Displays the default book for each row of data. This column appears if you select **Book Processing Assets** as a search criteria in the Review Assets page. The project amount that appears on this page is only for the default book. The amount does not include other books that may exist in the staging table for the asset. **Note:** If you assign a status value for a book processing row, the system applies the status to all books, not just the default book.

Modify Review Status

The action that you take in the **Modify Review Status** group box applies only to the rows that you select in the **Approve Assets** grid.

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Field or Control	Description
New Status	Select a new status to apply to selected rows in the **Approve Assets** grid. Available values are based on the row's current status. Options are: *Approved:* Apply to rows that are reviewed and ready to send to PeopleSoft Asset Management. You can then either select an option in the **Send to Asset Management** group box to continue processing the transaction to PeopleSoft Asset Management, or exit the page. This value is available if you selected a *Pending* distribution status on the Review Assets page. *Distributed:* Apply to rows if you accidentally assigned a new status of *Reverse* and changed your mind. This value is available if you selected a *Distributed* distribution status on the Review Assets page. *Hold:* Apply to rows that are not yet approved and should not be sent to PeopleSoft Asset Management. This value is available if you selected a *Pending* distribution status on the Review Assets page. *Reject:* Apply to rows that are rejected and should not be sent to PeopleSoft Asset Management. Use this option if there is an issue with the data and you want to return to the source transaction to make corrections prior to sending the data to PeopleSoft Asset Management. This value is available if you selected a *Pending* distribution status on the Review Assets page. *Reverse:* Apply to rows that you want to reverse in PeopleSoft Asset Management to correct erroneous transactions. This value is available if you selected a *Distributed* distribution status on the Review Assets page.
Apply Status to Selected Rows	Click to apply the new status to all selected rows in the **Approve Assets** grid.

> **Note**
>
> After you apply the new status to selected rows, click **Save** to save the changes to the PC to AM Staging table.

Send to Asset Management

The action that you take in the **Send to Asset Management** group box applies only to the rows that you select in the **Approve Assets** grid. The system processes all selected rows in the grid, even if they do not appear in the current view.

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Field or Control	Description
Asset Processing Destination	Select the option that determines how far the asset data flows into PeopleSoft Asset Management when you click **Process Selected Approvals.** Available options are: *Run Interface* *Run Interface and Load* Asset processing destination options are discussed in the Common Elements Used to Manage Assets topic.
Process Selected Approvals	Click to initiate the Send to Asset Management process to send the selected approved transactions to PeopleSoft Asset Management based on the selected asset processing destination. This button is available if you selected a *Pending* distribution status on the Review Assets page. **Note:** The system processes only selected assets with an asset review status of *Approved.* Use the **Modify Review Status** group box to change the status of selected rows to *Approved* before you initiate the Send to Asset Management process.

Reject Asset Transactions

The action that you take in the **Reject Asset Transactions** group box applies only to the rows that you select in the **Approve Assets** grid. The system processes all selected rows in the grid, even if they do not appear in the current view.

Field or Control	Description
Process Selected Rejections	Click for the system to process the selected assets with an asset review status of *Reject.* The system removes the rows from PC to AM Staging table and changes the Asset Management distribution status to *N* on the Project Transaction table, which enables you to adjust the transactions in PeopleSoft Project Costing. The system processes all selected rows in the grid, even if they do not appear in the current view. This button is available if you selected a *Pending* distribution status on the Review Assets page. After you adjust the rows and are ready to send them to PeopleSoft Asset Management, run the Send to Asset Management process and repeat the steps to review and approve the transactions.

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Reversing Asset Transactions

Use the Review Assets page (PC_AM_APPROVE) to reverse asset transactions.

Navigation:

Project Costing, and then **Assets**, and then **Review Assets**, and then **Review Assets**

To reverse transactions:

1. Enter search criteria to retrieve the list of assets that you want to reverse.
2. Select a distribution status of *Distributed* and click **Search.**
3. Select rows on the Integration Summary page that you want to reverse.

   The Integration Summary page appears with a list of transactions that match your search criteria.
4. In the **Modify Review Status** group box, select *Reverse* and click **Apply Status to Selected Rows.**
5. Select the date type that the system uses as the transaction date or the accounting date on all assets that are processed in this run control.

   The **Transaction Date Override and Accounting Date Override** group boxes are available if you selected a *Distributed* distribution status on the Review Assets page.

   See Manual Capitalization Review Page.
6. Select the asset processing destination and click **Process Selected Reversals.**

   The **Process Selected Reversals** button is available if you selected a *Distributed* distribution status on the Review Assets page.

These steps trigger the Reverse Distributed Assets Application Engine process (PC_REVERS_AM) that creates two additional rows—a negative offset transaction row that is sent to PeopleSoft Asset Management as a reversal, and the original, undistributed transaction in PeopleSoft Project Costing.

To view the reversed summarized transactions, select the *Reversed* distribution status as selection criteria on the Review Assets page. Use the Transaction List page to view the detailed reversed transactions.

You can modify the express filter criteria for the new, undistributed transactions in PeopleSoft Project Costing as required, and send the transactions back through the asset assignment and capitalization processes.

> **Note**
>
> You cannot reverse temporary assets that you created by using the Summarize by Profile feature if you already replaced them with permanent assets by using the Summarize by Asset feature.

Integration Detail Page

Use the Integration Detail page (PC_AM_PND_ASSTS2) to analyze detail (nonsummarized) transaction rows in the PC to AM Staging table that have not been sent to PeopleSoft Asset Management.

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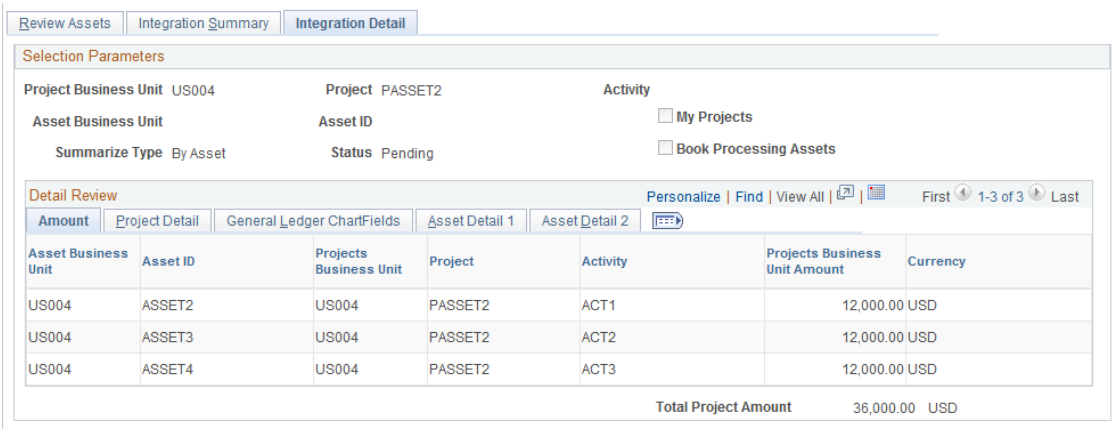
Navigation:

Project Costing, and then **Assets**, and then **Review Assets**, and then **Integration Detail**

This example illustrates the fields and controls on the Integration Detail page.



This page displays details of the transactions that were summarized on the previous tab.

Additional tabbed pages that appear on this page in the **Detail Review** group box provide more details about the asset. These fields are display only to ensure that required changes to the asset are made at the data source.

Project Detail

Field or Control	Description
Transaction Cost	Displays the amount in the transaction currency of the original source transaction.
Transaction Currency	Displays the original source transaction currency.

Book

The **Book** grid appears on this page if you select **Book Processing Assets** as a search criteria in the Review Assets page. You can scroll through and analyze detail data that is grouped by book.

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Retiring Assets

Pages Used to Retire Assets

Page Name	Definition Name	Usage
Asset Retirement Page	PC_AM_RETIRE	Run the Asset Retirement Integration process to fully or partially retire assets that are associated with Project Costing-managed projects and activities, even if the assets do not originate from the PeopleSoft Project Costing system.
Express Retirement Process Page	RUN_PC_EXP_RET	Run the Express Retirement process to retire assets that are associated with work order-managed projects if you use PeopleSoft Maintenance Management.

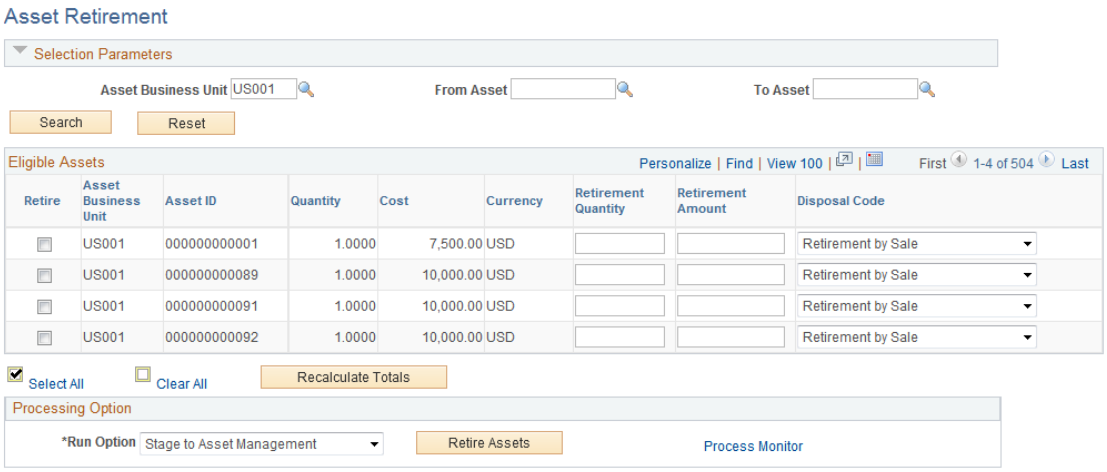
Asset Retirement Page

Use the Asset Retirement page (PC_AM_RETIRE) to run the Asset Retirement Integration process to fully or partially retire assets that are associated with Project Costing-managed projects and activities, even if the assets do not originate from the PeopleSoft Project Costing system.

Navigation:

Project Costing, and then **Assets**, and then **Express Asset Retirement**

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



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> **Note**
>
> Prior to retiring an asset in PeopleSoft Project Costing, process all unprocessed transaction rows pertaining to this asset out of PeopleSoft Asset Management's staging table and into production. This ensures that you have updated asset status and cost information.

Enter the asset management business unit and a range of asset IDs, if appropriate, to view a list of assets that are eligible for retirement. The system retrieves assets that meet the search criteria and:

- Exist in PeopleSoft Asset Management as financial assets, and not as group assets.
- Have an asset status that does not equal transferred, which indicates that the asset has been transferred from one business unit to another within PeopleSoft Asset Management.
- Are capitalized assets.

Field or Control	Description
Reset	Click to clear all search criteria fields.

Eligible Assets

Field or Control	Description
Retire	Select an asset row to fully or partially retire the asset when you click **Retire Assets.** You must select the row for the system to process the retirement amount.
Quantity	Displays the asset's quantity which, along with the retirement quantity that you enter, is used to determine what proportion of the asset's cost is calculated and appears in the **Retirement Amount** field.
Cost	Displays the asset's cost which, along with the retirement amount that you enter, is used to determine what proportion of the asset quantity is calculated and appears in the **Retirement Quantity** field.
Retirement Quantity	Enter a retirement quantity up to the value that appears in the **Quantity** field for the asset. You cannot enter a retirement quantity that is greater than the asset's quantity.
Retirement Amount	Enter a retirement amount up to the value that appears in the **Cost** field for the asset. You cannot enter a retirement amount that is greater than the asset's cost value. Even if the asset quantity and retirement quantity equal zero, indicating that the asset was previously retired, you can enter additional proceeds from sale or cost of removal that occurred after you retired the asset.

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Field or Control	Description
Disposal Code	Select the code to track the type of disposition for this asset. Available values are: *Blank* *Abandoned:* This code prevents the retirement process from sending the proceeds from sale to PeopleSoft Asset Management. *Cannibal* *Casualty* *Disappear:* This code prevents the retirement process from sending the proceeds from sale or cost of removal to PeopleSoft Asset Management. *Donated* *Inventory* *Missing* *Sale* *Scrap* *Theft:* This code prevents the retirement process from sending the proceeds from sale or cost of removal to PeopleSoft Asset Management. *Trade-In*
Recalculate Totals	Click to calculate a new value when you enter a retirement quantity or retirement amount.

Processing Option

Field or Control	Description
Run Option	Select the function that the system performs when the asset retirement process runs. The run option determines the tables that the system updates with asset information during the asset retirement process. Options are: *Stage to Asset Management:* Select to populate the PeopleSoft Asset Management Loader table. This is the default value. *Stage and Load Transactions:* Select to populate the PeopleSoft Asset Management Loader table and the PeopleSoft Asset Management production tables.
Retire Assets	Click to run the Asset Retirement Integration process to retire the selected assets.

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> **Note**
>
> The system does not update the Asset Retirement page until after the AM Transaction Loader process runs in PeopleSoft Asset Management and the retirement transaction is loaded into Asset Management production tables. Run the AM Transaction Loader process to keep the Asset Retirement page current and to avoid creating duplicate retirement transactions in the PeopleSoft Asset Management Loader table.

Express Retirement Process Page

Use the Express Retirement Process page (RUN_PC_EXP_RET) to run the Express Retirement process to retire assets that are associated with work order-managed projects if you use PeopleSoft Maintenance Management.

Navigation:

Project Costing, and then **Assets**, and then **Express Retirement Process**, and then **Express Retirement Process**

Use this page to fully retire assets that are associated with work order-managed projects. This page is accessible only if PeopleSoft Maintenance Management in installed. Otherwise, an error message appears when you try to access the page.

Select the project business unit and click **Run Retire Asset Option** to launch the Express Retirement process. The process:

- Retrieves the related costs (removal cost and proceeds for sale) for all eligible project activities from the Project Transaction table.
- Retrieves the asset data from the work order task.
- Automatically runs the Asset Retirement Integration process to send the assets to PeopleSoft Asset Management.

You can send assets to the PeopleSoft Asset Management Loader table only, which is the default value. Alternatively, you can send assets to both the PeopleSoft Asset Management Loader table and the PeopleSoft Asset Management production tables.

Related Topics

- PeopleSoft Maintenance Management: Understanding Service Request and Work Order Close
- PeopleSoft Maintenance Management: Running WM_CLOSE for Service Requests, Work Order Tasks, and Work Orders
- PeopleSoft Maintenance Management: Running the Cost Summarization Process

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Integrating with PeopleSoft Contracts and PeopleSoft Billing

Understanding Integration with PeopleSoft Contracts and PeopleSoft Billing

PeopleSoft Project Costing works with PeopleSoft Contracts to generate project-related customer billing. This is called rate-based project billing. For rate-based billing, PeopleSoft Contracts pulls information from project transactions and populates the PeopleSoft Billing interface tables with the billing information.

PeopleSoft Contracts stores contractual terms and conditions. You can:

- Select a product with a rate price type on a contract line,
- Associate the contract line with a project business unit and rate,
- Specify retainage and discount information for standard contracts, or withholding information for government contracts, which is optional.
- Link project activities to the contract line.

PeopleSoft Contracts enables you to establish billing plans and revenue plans. These plans enable you to manage when and how much to bill and recognize for the amounts that are associated with one or more contract lines.

When you bill rate-based contract lines, the flow of data is controlled by PeopleSoft Contracts, and the data source is PeopleSoft Project Costing. Project Costing tracks the work performed, accumulates costs against a project, and stores the information in the Project Transaction table (PROJ_RESOURCE). The system drives rate-based project billing by applying the rates that you identified in PeopleSoft Contracts against the unbilled rows in the Project Transaction table. The analysis types belong to the analysis group that is specified in the **Billing** field on the Installation Options - Project Costing page. The default analysis group is PSWKS (Billing Worksheet Grouping). PeopleSoft Billing generates invoices for the contract lines and sends information regarding the invoices back to PeopleSoft Project Costing and PeopleSoft Contracts.

You can link a contract line to a specific project activity or to all activities for that project. This enables you to link a single project with multiple activities to multiple contracts or contract lines. You can link a rate-based contract line to activities from multiple projects that are in the same project business unit. You cannot link a project activity to more than one rate-based contract or contract line.

When you bill fixed-amount, value-based, and recurring contract lines, PeopleSoft Contracts provides both the data source and the control over billing. You can associate these contract lines with a single project activity.

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> **Note**
>
> You must associate a project activity with a contract line to use PeopleSoft Project Costing to accumulate, store, and report on project costs for contracts. For example, you must associate an activity with a contract line if you want to use the Project Transaction table as the source for rate-based project billing. You must also select one of the associated project activities for a contract line to use when creating fee and withholding transactions.

When you run the Process Project Accounting Application Engine process (PSA_ACCTGGL), the system selects those rate-based contract lines that are tied to *As Incurred* revenue recognition plans. For each project linked to a contract line that is associated with a selected *As Incurred* revenue recognition plan, the process selects the undistributed Project Transaction table rows where the analysis types are included in the PSREV analysis group. If you use the Government Contracting feature and select the **Separate Billing and Revenue** option on the Installation Options - Contracts page, the process selects the undistributed Project Transaction table rows where the analysis types are included in the PSREV or PSRV2 analysis groups. The system then books revenue for these projects based on the accounting rules. The exception to this rule is having a contract line in a government contract with a fee type of *None* and the **Separate Billing and Revenue** option is selected on the Installation Options - Contracts page. For these contract lines, the Process Project Accounting process uses the PSREV analysis group to process the revenue.

Set Up and Process Project-Related Contract Lines

This table lists the high level steps to set up and process project-related contract lines, and provides links to the topic locations that discuss the steps:

Step	Topic Documentation
Set up rates.	See Defining Rate Set Categories, Rate Sets, and Rate Plans.
(Optional) Set up tiered pricing.	See Defining Tiered Pricing.
(Optional) Set up rules and exceptions for organizational sharing.	See Understanding Accounting for Projects and Defining the Sharing Structure.
Set up contracts and contract lines.	See PeopleSoft Contracts: Understanding Contracts, PeopleSoft Contracts: Defining General Contract Information, and PeopleSoft Contracts: Defining Contract Lines.
Assign projects and activities to contracts.	See PeopleSoft Contracts: Assigning Projects and Activities to Contracts and Maintaining Projects Using the Contracts Workbench.
Accumulate and price project transactions from feeder systems.	See Understanding the Pricing Process, Understanding Integration with PeopleSoft Time and Labor, Understanding Integration with Expenses, and Understanding Third-Party Data Integration.
(Optional) Update project progress.	See PeopleSoft Contracts: Processing Project Progress and Percent Complete.
(Optional) Approve transactions eligible for billing.	See Summarizing Transactions for Project Manager Review.

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Step	Topic Documentation
Bill for projects.	See PeopleSoft Contracts: Understanding the Contracts Billing Process and PeopleSoft Contracts: Running the Contracts Billing Interface Process.
Recognize revenue for projects.	See PeopleSoft Contracts: The Rate-based Revenue (Accounting Rules Engine) Process (PSA_ACCTGGL). See Processing Transactions Using Accounting Rules.

> **Note**
>
> You can use streamlined billing to reduce the number of steps for invoicing bills. Streamlined billing enables you to process transactions from PeopleSoft Contracts to PeopleSoft Billing and back to Contracts with one job.

Related Topics

- PeopleSoft Contracts: Understanding the Relationship Between PeopleSoft Contracts and PeopleSoft Project Costing
- Manager Transaction Review - Billing Review Page
  Use the Manager Transaction Review - Billing Review page (PC_PM_SUMM_BILL) to review detailed or summarized project billing transactions.
- PeopleSoft Contracts: Streamlined Billing

Understanding the Billing Process Flow

The subsequent billing cycle diagram shows the flow of the billing process for rate-based contract lines. The numbered steps that are on the diagram correspond to updates that occur to these tables:

- PeopleSoft Contracts control tables—Billing Plans (CA_BILL_PLAN) and Billing Events (CA_BP_EVENTS).

  The Billing Plans table defines high-level information about the billing plan. The Billing Events table defines when payments are due.
- Contracts-Billing Cross-reference table (CA_BP_XREF).

  The Contracts-Billing Cross-reference table provides visibility of all billing activity that relates to contracts, regardless of where the billing activity originates.
- Project Transaction table (PROJ_RESOURCE).

The numbered steps are discussed in more detail in the following diagram:

This diagram illustrates the billing cycle flow for rate-based contract lines.

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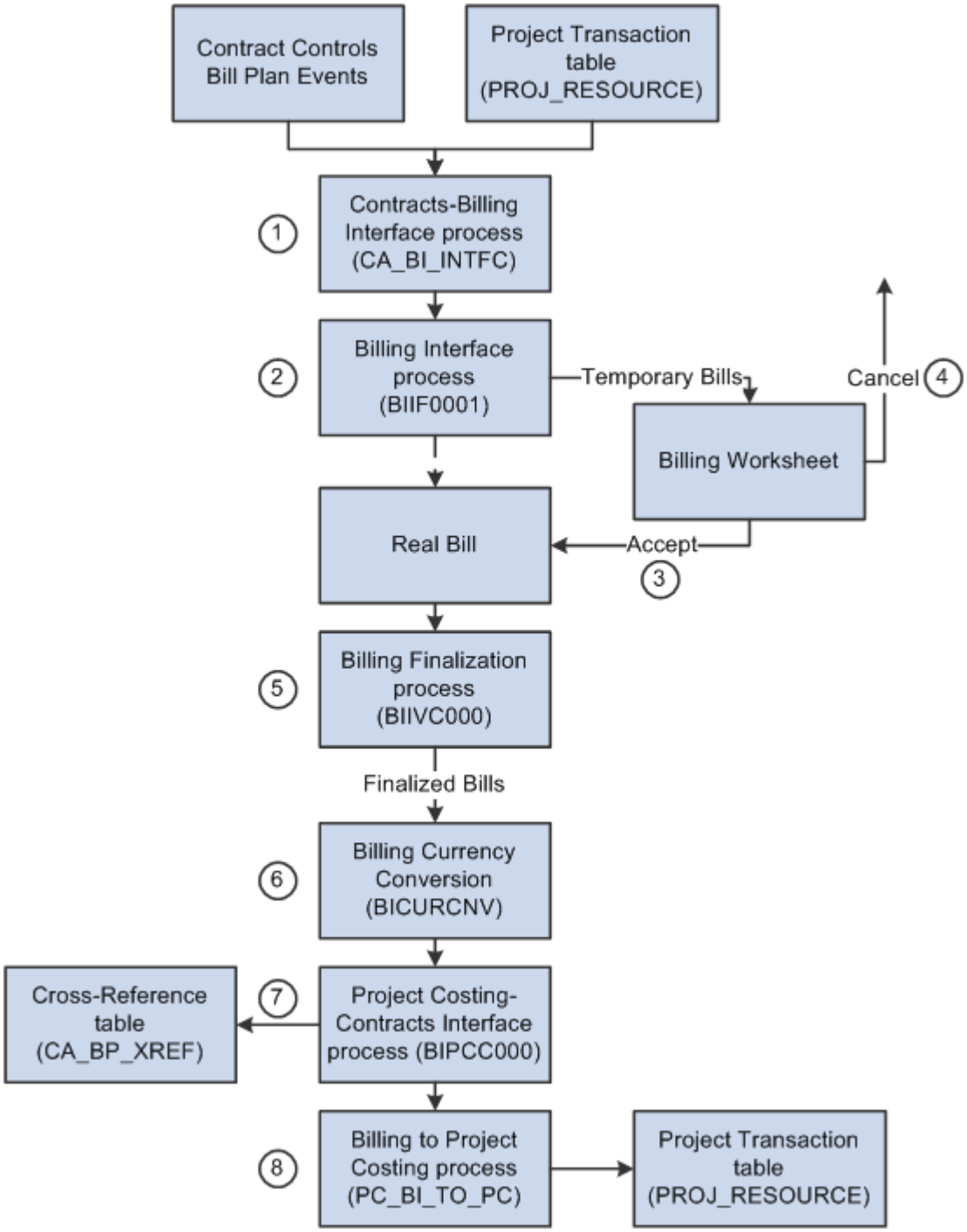

Contract Limits

Costs are subject to transaction and contract line-level limits. Transaction limits, which the system applies before contract line level limits, are based on limits that you establish by contract line and transaction identifier and comprise combinations of transaction sources, categories, and subcategories.

The system applies the transaction and contract line limits against corresponding direct and indirect cost transactions. The system creates billable transactions (rows with an analysis type of BIL) for cost transactions that completely pass limit checking or over-the-limit transactions

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(rows with an analysis type of OLT) for transactions that exceed applicable limits. If the **Separate Billing and Revenue** option on the Installation Options - Contracts page is selected, the system creates revenue transactions (rows with an analysis type of REV) for cost transactions for cost-plus contract lines that completely pass limit checking, or over-the-revenue-limit transactions (rows with an analysis type of ROL) for transactions that exceed applicable limits. The system splits cost transactions into separate billing and revenue and over-the-limit transactions in the amount of the remaining limit and excess, respectively, if the **Split to Match Limit Exactly** option on the Installation Options - Contracts page is selected. The system excludes OLT and ROL rows from billing and revenue processing.

The Pricing Application Engine process (PC_PRICING) calls limit processing, which examines each Project Transaction table row that represents a contract line for which you have enabled bill limits. Additionally, you can run the Limits Application Engine process (CA_LIMIT) as a standalone process and select specific run control criteria to apply limits to specific contracts, recalculate limit amounts when totals are changed, or apply limits to billing and revenue transactions.

If a discount amount exists for a project, the transaction row amount is decreased by the discount amount prior to comparing the transaction row against the limit. Discounts do not apply to government contracts.

See PeopleSoft Contracts: Understanding the Contracts Billing Process.

Contracts-Billing Interface Process (CA_BI_INTFC)

Run the Contracts-Billing Interface Application Engine process, also called the Billing Engine, in PeopleSoft Contracts for the appropriate billing methods to send Contracts-related and Project Costing-related billing activity to PeopleSoft Billing.

This process selects transaction rows (for rate-based billing methods) or billing plan lines (for fixed-amount billing methods) that are marked in PeopleSoft Contracts as ready to bill, and creates bill rows in the PeopleSoft Billing Interface tables (INTFC_BI and its related tables). After the Contracts-Billing Interface process stages billing data in these tables, the Billing Interface Application Engine process creates bills.

See the PeopleSoft Contracts: Running the Contracts Billing Interface Process and PeopleSoft Contracts: Understanding the Contracts Billing Process.

Direct Invoicing

You can select the **Pre Approved** and **Direct Invoice** billing options in the Billing Plan - Billing Plan General page in PeopleSoft Contracts to bypass the invoice approval process in PeopleSoft Billing.

For additional product information about direct invoicing and interunit billing see the PeopleSoft Contracts: Understanding the Contracts Billing Process topic.

For additional information about the Contracts to Billing Interface process, see PeopleSoft Contracts: Running the Contracts Billing Interface Process.

For additional information about billing plans, seePeopleSoft Contracts: Defining Billing Plans.

Interunit Billing

The system uses accounting rules to send data to the Contracts-Billing Interface process to forward to PeopleSoft Billing. You set up the revenue distribution and the offsetting contract asset account for rate-based contract lines on the Accounting Rules page. If the general ledger business unit for the debit side of a transaction is different from the general ledger business

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unit for the credit side of a transaction, the system generates interunit entries when you run the Process Project Accounting process.

See PeopleSoft Contracts: Accounting Distributions for Interunit Transfers.

Billing Interface Process (BIIF0001)

The Billing Interface process can create two types of bills from the Contracts-Billing Interface process activity—temporary bills and real bills. You deselect or select the **Pre Approved** option to create temporary or real bills for individual billing plans on the Billing Plan - Billing Plan General page in PeopleSoft Contracts.

When interfacing billing data, the system checks for billing plans that are associated with the bill rows to determine whether they are designated as pre-approved. The system creates real bills for bill rows that are associated with pre-approved billing plans. Real bills become invoices that are sent to the customer.

The system creates temporary bills for bill rows that are not associated with pre-approved billing plans. Temporary bills are routed to the billing worksheet, where you can review and, for rate-based bills, approve or delete the entire worksheet, or bill, defer, delete, or write-off a bill line based on your review. Temporary bills or billing worksheets are grouped by invoice and display applicable tax information.

The system updates the Project Transaction Temporary Billing table (PROJ_RES_TMP_BI) when you approve a billing worksheet with bill options of defer, over-the-limit, and write-off, because none of these actions results in creating a bill for the customer. The data exits the staging table when the Billing to Project Costing process (PC_BI_TO_PC) runs and successfully moves the data from the staging table to the Project Transaction table.

Related Topics

- PeopleSoft Contracts: Defining Billing Plans
- PeopleSoft Billing: Processing Billing Worksheets
- PeopleSoft Billing: Running the Billing Interface Process (BIIF0001)

Accepting the Billing Worksheet

When you approve a billing worksheet, the system:

- Creates a real bill with an assigned invoice number for the approved worksheet.
- Updates the Project Costing Distribution Status field value (PC_DISTRIB_STATUS) on the Bill Header table (BI_HDR) to *I* (ignore) to prevent the temporary bill from reappearing on the billing worksheet.
- Updates the Contracts Prepaid table (CA_PREPAID_TBL) for all of the deleted rows that have a line type of UTL (utilization).

  The system adds the line's original amount (prior to any billing worksheet changes) back to the committed amount.
- For rate-based bill rows, updates the Project Transaction table, by way of the Project Transaction Temporary Billing table, for any rows with an analysis type of DEF (defer), WTO (write off), DEL (delete), or OLT (over the limit), that do not have a line type of UTL.
- For fixed-amount bill rows, updates the Cross-reference Status field value (XREF_STATUS) to *ACP* (accepted) in the Contracts-Billing Cross-reference table for all of the lines that originated in PeopleSoft Contracts.

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> **Note**
>
> The system inserts rate-based bill rows into the Contracts-Billing Cross-reference table after the invoice is finalized.

Related Topics

- PeopleSoft Billing: Processing Billing Worksheets

Deleting the Billing Worksheet

When you delete a billing worksheet, the system:

- For rate-based bill rows, resets the Billing Distribution Status field (BI_DISTRIB_STATUS) in PeopleSoft Project Costing to *P* (priced) for all of the lines that originate in the Project Costing system with a line type other than UTL. This enables you to send each line to PeopleSoft Billing again at a later time.
- Updates the Contracts Prepaid table (CA_PREPAID_TBL) for any lines that originate from PeopleSoft Project Costing with a line type of UTL.

  The system resets the committed amount on the Contracts Prepaid table to the deleted amount of a utilization bill line and the utilization amount that is available for future billing activities.

For fixed-amount bill rows, the system changes the Billing Plan Event Status field value to *RCL* (recycled) if one or more of the billing plan lines associated with the event is canceled in the billing worksheet.

Individual billing plan lines are processed if an event is marked as recycled and the billing plan line is canceled in the Contracts-Billing Cross-reference table. The Cross-reference Status field value is updated to *DEL* in the Contracts-Billing Cross-reference table. PeopleSoft Billing is able to process these types of rows differently because of the System Source field value (SYSTEM_SOURCE)—*PBI* (Project Costing to Billing Interface) for rate-based rows that originate in PeopleSoft Project Costing and *CBI* (Contracts to Billing Interface) for rows that originate in PeopleSoft Contracts.

Billing Finalization Process (BIIVC000)

Run the Billing Finalization process on the real bills that you created. The Billing Finalization process:

- Calculates taxes.
- Sets the invoice date.
- Calculates the due date for real bills.

Billing Currency Conversion Process (BICURCNV)

Billing Currency Conversion process (BICURCNV) must be run prior to running the Billing to Project Costing/Contracts Interface process (BIPCC000) to ensure that correct conversion rates are sent to project costing/contracts. For more information on Billing Currency Conversion process, see PeopleSoft Billing: Running the Currency Conversion Process (BICURCNV).

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> **Note**
>
> You must run the Billing Currency Conversion process prior to running the Billing to Project Costing/Contracts Interface process even if you are not using multiple currencies.

Project Costing-Contracts Interface Process (BIPCC000)

Run the Project Costing-Contracts Interface process after you run the Billing Finalization process. The Project Costing-Contracts process updates the Contracts-Billing Cross-reference table and the Project Transaction table with the finalized bill information from PeopleSoft Billing.

> **Note**
>
> Rate-based row amounts are subject to change throughout the billing process. For this reason, the system sends the rate-based rows and their final invoice amounts to the Contracts-Billing Cross-reference table only when you run the Project Costing-Contracts Interface process.

All rate-based rows and their associated discounts and retainages are written to the Project Transaction Temporary Billing table. The process includes rows with these analysis types:

- Billing adjustment (BAJ)
- Billable amount (BIL)
- Billing retainage (BRT)
- Billing discount (DSC)
- Released retainage adjustment (RAJ)
- Released billing retainage (RRT)

The Contracts-Billing Interface process inserts fixed-amount bill rows into the Contracts-Billing Cross-reference table. This is because fixed-amount rows are not modifiable; you can only accept or delete them. The system updates the bill row status throughout the Billing Interface process, worksheet cancellation or acceptance, and the Billing Finalization process. Fixed-amount rows that specify a project are sent to PeopleSoft Project Costing with an analysis type of FBD (fixed cost billed amount).

The PeopleSoft Billing: Running the Billing to Project Costing/Contracts Interface Process (BIPCC000) topic discusses the fields that the Billing Finalization process updates in PeopleSoft Contracts.

> **Note**
>
> Although only certain project activities pertain to particular contract lines, the system does not store project activities in the Contracts-Billing Cross-reference table. Activities are summarized by project and billing currency.

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Billing to Project Costing Process (PC_BI_TO_PC)

Run the Billing to Project Costing process for rate-based contract lines to update the Project Transaction table with results from PeopleSoft Contracts and PeopleSoft Billing processes, including adjustments, discounts, retainages, withholdings, and so forth.

PeopleSoft Billing processes write bill rows to the Project Transaction Temporary Billing table. The Billing to Project Costing process moves the rows from the Project Transaction Temporary Billing table to the Project Transaction table, either in the form of updates to existing rows or as new inserted rows. The process uses the PSBLD (Billing to Projects) analysis group to determine which rows to process and how to process the rows coming from PeopleSoft Billing.

This table lists how transactions are handled:

Description	Analysis Type of Source Transaction Row	Analysis Type of New or Updated Transaction Row	Billing Distribution Status After Billing to Project Costing Process
Bill row	BIL (billable amount)	BLD (billed amount)	D (distributed)
Write off	WTO (see note)	WTO	I (ignore)
Deferral	DEF (see note)	DEF	P (priced)
Over limit	OLT (see note)	OLT	P
Billing retainage	BRT	BRT (multiplier of –1)	P
Billing adjustment	BAJ	BAJ	D
Released billing retainage	RRT	RRT	D
Released retainage adjustment	RAJ	RAJ	D
Billing discount	DSC	DSC (multiplier of –1)	D
Prepaid bill row	BIL - with source type of CBI (Contracts to Billing Interface)	BLD	D
Prepaid utilization for billing	UTL	UTL (multiplier of –1)	I
Prepaid utilization adjustment	UAJ	UAJ (multiplier of –1)	I
Prepaid utilization adjustment	UTL	UAJ (multiplier of –1)	I
Fixed fee	BIL - with source type of CBI	BLD	D
Withholding	WTH	WTH (multiplier of –1)	D
Withholding adjustment	WAJ	WAJ (multiplier of –1)	D
Withholding release	WRL	WRL	D
Withholding release adjustment	WRJ	WRJ	D
Withholding write-off	WWO	WWO	D
Sales/use tax	SUT	SUT	D
Nonrecoverable VAT	VIN	VIN	D

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> **Note**
>
> If the source of a WTO, DEF, or OLT row is a retainage (BRT in the Project Transaction table, or RRT in the billing worksheet) rather than a BIL, the system does not follow the preceding logic. Instead, the system updates the **Billing Distribution Status** field for the BRT row to *D* (distributed) and inserts three new rows: RRT row with billing distribution status of *I* (ignore), RAJ row with billing distribution status of **I,** and either a WTO row with billing distribution status of *I,* a DEF row with billing distribution status of *P* (priced), or an OLT row with billing distribution status of *P.*

You can determine billed and unbilled amounts by appropriately grouping analysis types within the Project Transaction table. Analysis types and analysis groups can be user-defined. PeopleSoft delivers these sample analysis groups that contain analysis types for billed and unbilled amounts:

Analysis Group	Analysis Types
BLD (billed transactions)	BAJ (billing adjustment) BLD (billed amount) BRT (billing retainage) DSC (billing discount) FBD (fixed cost billed amount) RAJ (released retainage adjustment) RRT (released billing retainage) SUT (sales/use tax) UTL (prepaid utilization for billing)
UNBLD (unbilled transactions)	BIL (billable amount) BRT (billing retainage) DEF (deferred amount) OLT (over limit amount) RRT (released billing retainage)

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Analysis Group	Analysis Types
PSBLD (Billing to Projects)	BAJ (billing adjustment) BIL (billable amount) BRT (billing retainage) DEF (billing deferral) DSC (billing discount) FBD (fixed cost billed amount) OLT (over limit) PMR (proposal management reversal) RAJ (released retainage adjustment) RRT (released billing retainage) SUT (sales/use tax) UAJ (prepaid utilization adjustment) UTL (prepaid utilization billing) WAJ (withholding adjustment) WRJ (withholding release adjustment) WRL (withholding release) WTH (withholding) WTO (write off) WWO (withholding write off)

On the source transaction row, the system updates the billing distribution status to:

- *P* (priced) when the row is priced.
- *D* (distributed) when the row is successfully billed.

On the target row, the system updates the billing distribution status to:

- *W* (billing worksheet) while the row is in the billing process or in the worksheet.
- *P* when it is created from the Pricing Engine.
- *W* when PeopleSoft Contracts selects it for billing.
- *D* when the row is successfully billed.

> **Note**
>
> After the Billing to Project Costing process finishes, run the Refresh Summary Tables Application Engine process (PC_SUM_RFSH) to synchronize the PC_SUMMARY_TBL and CA_PR_SUMM summary tables with new data in the Project Transaction table.

Understanding Data Originating from PeopleSoft Project Costing (PBI System Source)

This table shows the life cycle of project transaction rows that are eligible for billing. This table starts after the transaction is priced:

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Process	Billing Distribution Status	Cross-reference Status	Analysis Type Rows Inserted into the Project Transaction Temporary Billing Table
Start	P (priced)	NA (not applicable)	NA
Contracts-Billing Interface (Billing Engine)	W, if action finishes S, if action ends abnormally	NA	NA
Billing Interface	NA	NA	NA
Accept Worksheet	NA	NA	OLT (over the limit) DEF (defer) WTO (write off) WWO (withholding write-off)
Delete Worksheet	P	NA	NA
Billing Finalization	NA	NA	NA
Project Costing-Contracts Interface (see note)	D (distributed)	FIN (finalized)	BAJ (billing adjustment) BRT (billing retainage) DSC (billing discount)

Note

The Project Costing-Contracts Interface process calls the Contracts Billing Update Application Engine process (CA_BI_UPD), which updates the **Billing Plan Event Status** field to *DON* (completed) if all rows for the event have a Cross-reference Status field value of *FIN* in the Contracts-Billing Cross-reference table. The system updates the **Billing Plan Status** field to *DON* if all events are completed.

Moving Costs and Revenue Data into PeopleSoft Project Costing

Pages Used to Move Costs and Revenue Data into PeopleSoft Project Costing

Page Name	Definition Name	Usage
Retrieve Billing Items Page	PC_BI_TO_PC	Run the Billing to Project Costing process for rate-based contract lines to update the Project Transaction and summary tables with results from PeopleSoft Contracts and PeopleSoft Billing processes. See Understanding the Billing Process Flow.

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Page Name	Definition Name	Usage
Summarize Revenue and Billing Page	PC_REVBI_SUM	Run the Billing and Revenue Management Application Engine process (PC_REVBI_SUM) to update the Billing and Revenue Summary table (PC_BI_MNGMT).
Retrieve Revenue from Contracts Page	PC_CA_TO_PC	Run the Contracts to Project Costing Application Engine process (PC_CA_TO_PC) for fixed-amount contract lines to update the Project Transaction table with results from PeopleSoft Contracts and PeopleSoft Billing processes.

Summarize Revenue and Billing Page

Use the Summarize Revenue and Billing page (PC_REVBI_SUM) to run the Billing and Revenue Management Application Engine process (PC_REVBI_SUM) to update the Billing and Revenue Summary table (PC_BI_MNGMT).

Navigation:

Project Costing, and then **Revenue Collection**, and then **Collect Revenue Summarization**

Use this page to update the Billing and Revenue Summary table (PC_BI_MNGMT). The system copies rows from the Project Transaction table and summarizes them by business unit, project, activity, customer, and contract number. Amounts are in transaction currencies. The process restricts the rows to analysis types that are included in the analysis groups BLD, UNBLD, PSBLD, PSREV, and PSRV2.

Related Topics

- PeopleSoft Contracts: PeopleSoft Contracts Reports: A to Z

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Understanding Integrating with Contracts for Government Contracting

Understanding PeopleSoft Project Costing and Government Contracting Integration

The Government Contracting feature enables contractors to effectively manage government contracts in accordance with governmental rules and regulations. The Government Contracting system uses project, activity, and transaction data that is stored in PeopleSoft Project Costing to calculate costs and fees for billing, and to create accounting entries for revenue recognition for rate-based products or services. Transactions that the Government Contracting feature creates, such as fees and withholding transactions, are sent back to PeopleSoft Project Costing for analysis purposes.

This topic discusses:

- Terminology that is relevant to the integration between PeopleSoft Project Costing and the Government Contracting feature.
- Cost-plus contract lines.
- Government contract pricing.
- Government contract limits processing.
- Government contract withholding.
- Government contract progress payments
- Government contract variance pricing.

Terminology

This table describes terms that are relevant to the integration between PeopleSoft Project Costing and the Government Contracting feature:

Term	Description
Applied over/under asset account	A type of account that is associated with a specific cost pool and is used to store the difference between provisional (burden) expenses and actual indirect expenses. Cost rows that are generated from variance pricing typically reduce the balance of this account to zero.
Burden	Indirect costs that are created in PeopleSoft Project Costing by applying indirect rates, such as provisional rates and forward pricing rates.

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Term	Description
Burden rate	A rate that is associated with each defined cost pool and is typically approved by government auditors. Burden rates are subject to change based on a periodic assessment of actual indirect expenses. Changes to burden rates require adjustments to burden costs by using variance pricing.
Cost-plus contract line	The term used in PeopleSoft Contracts and Project Costing to identify a rate-based contract line on a government contract with a fee type of fixed, award, incentive, or other. For cost-plus contract lines, direct costs are billed and revenue is booked at cost, with no mark up. Typically profit is based on a prenegotiated fee.
Direct costs	Direct costs are defined by the source systems, such as PeopleSoft Payables, Expenses, Time and Labor, and third-party applications. In cost-reimbursement pricing arrangements, such as a cost-plus contract, government contractors typically bill the government for the direct costs, and recognize revenue with no markup for these costs.
Fee	In cost-reimbursement pricing arrangements, fees are the profit that is negotiated and documented in the contract. Fees can be fixed at the outset of performance, as in cost-plus-fixed-fee arrangements, or may vary, as in a cost-plus-incentive fee arrangement. In Government Contracting, a contract can include one or more of these fee types: fixed, award, incentive, and other. Each contract line, however, can contain only one fee type.
Forward pricing rates	Rates that are used to calculate revenue recognition based on indirect costs. Forward pricing rates are determined by the government contractor, and can be different from provisional rates. Forward pricing rates represent the best estimate of the government contractor's overhead costs as a percentage of direct costs. They can also include a calculation against nonbillable costs. Forward pricing rates can be submitted by the contractor to the government for negotiation to bid on future or multiyear contracts. When the contractor and government reach an agreement, typically the rates are documented in a forward pricing rate agreement and are used to calculate indirect costs for revenue recognition.
Indirect costs	Additional costs that are applied as a percentage of direct costs. Examples of indirect costs are overhead costs, general and administrative expenses, fringe, and cost of money.

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Term	Description
Provisional rates	Estimates of the cost of overhead as a percentage of direct costs, specified by the government. Government contractors calculate and bill the government for indirect costs based on provisional rates.
Variance pricing	Retroactive rate adjustments that are used periodically to book variances to billing and revenue rows. The system tracks the sum of a project's revenue and billing transactions. Upon final settlement or as required during the project, the government determines the required rate variance adjustment.

Cost-Plus Contract Lines

After you establish a cost-plus contract line in a government contract, and you create the billing and revenue plans to process billing and revenue for cost-plus fees, you link the contract line to a project and activity. This enables the system to appropriately allocate direct and indirect costs by using a standard or contract-specific rate set or rate plan that you create in PeopleSoft Project Costing.

Related Topics

- Defining Rate Set Categories, Rate Sets, and Rate Plans
  To define rate set categories, rate sets, and rate plans, use these components:
- PeopleSoft Contracts for Government Contracting: Understanding Creating Cost-Plus Government Contract Lines

Government Contract Pricing

You can create rate sets with a rate definition type of billing, cost, cost/billing, or revenue, for use on cost-plus contract lines. Rate sets with the revenue rate definition type are available for government contracts if you select the **Separate Billing and Revenue** option on the Installation Options - Contracts page. The system separates the billing and revenue accounting rules because the amounts that are used for billing a government contract may be different than the amount and timing of revenue that is recognized and sent to the general ledger. You can run the Pricing Application Engine process (PC_PRICING) to process all contract lines, or run the process separately for cost, billing, or revenue transactions.

Billing, cost, and cost/billing rate definition types are always available for rate sets.

> **Note**
>
> Government contracts are not eligible for organizational sharing or quantity-based tiered pricing.

Related Topics

- Understanding the Pricing Process
  This topic discusses:

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Government Contract Limits Processing

Costs are subject to transaction and contract line level limits. The system applies transaction limits before contract line level limits. Transaction limits are based on limits that you establish by contract line and transaction identifier, and are comprised of combinations of transaction sources, categories, and subcategories. The system applies the transaction and contract line limits against corresponding direct and indirect cost transactions, excluding the transactions that are outside of the period of performance if the **Control Limits and Billing** option is selected for the contract line on the Contract Amounts page. The system creates billable transactions (with an analysis type of BIL) and revenue-recognizable transactions (with an analysis type of REV) for cost transactions that completely pass limit checking. The system creates over-the-limit billing transactions (with an analysis type of OLT) and over-the-limit revenue transactions (with an analysis type of ROL) for cost transactions that exceed any applicable limit. The system splits a cost transaction into separate billable and over-the-limit billing transactions and separate revenue-recognizable and over-the-limit revenue transactions in the amount of the remaining limit and excess, respectively, if the **Split to Match Limit Exactly** option is selected on the Installation Options - Contracts page. The system excludes OLT and ROL rows from billing and revenue processing, and from the costs to be used for the fee calculation, when OLT and ROL analysis types are excluded from the analysis groups in the **BIL Analysis Group** and **REV Analysis Group** fields that are specified in the **Calculation Basis** group box on the Contracts Definition - Fee Definition page for the business unit.

Related Topics

- PeopleSoft Contracts: Understanding Limits
- PeopleSoft Contracts: Setting Up Limits
- PeopleSoft Contracts: Setting Up Transaction Limits
- PeopleSoft Contracts: Processing Limits
- PeopleSoft Contracts: Reviewing and Releasing Limits

Government Contract Withholding

The government can require contractors to retain a percentage of rate-based contract lines as an incentive to complete the contract by a specified date. The Contracts Billing Interface Application Engine process (CA_BI_INTFC) generates withholding transactions. During the billing cycle, the Billing Worksheet and the Project Costing-Contracts Interface Application Interface process (BIPCC000) send withholding transactions to the Project Transaction Temporary Billing table (PROJ_RES_TMP_BI). Then the Billing to Project Costing Application Engine process (PC_BI_TO_PC), which updates the Project Transaction table with results from PeopleSoft Contracts and PeopleSoft Billing processes, inserts rows into the Project Transaction table for staged withholding transactions. Withholding transactions are designated with these analysis types:

- Withholding (WTH)
- Withholding Adjustment (WAJ)
- Withholding Release (WRL)
- Withholding Release Adjustment (WRJ)
- Withholding Write-off (WWO)

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Related Topics

- Understanding the Billing Process Flow
  The subsequent billing cycle diagram shows the flow of the billing process for rate-based contract lines. The numbered steps that are on the diagram correspond to updates that occur to these tables:
- Processing Transactions Using Accounting Rules
- PeopleSoft Contracts for Government Contracting: Understanding Withholding
- PeopleSoft Contracts for Government Contracting: Defining Withholding and Release Terms
- PeopleSoft Contracts for Government Contracting: Managing Accounting Distributions for Withholding
- PeopleSoft Contracts for Government Contracting: Generating Billing Invoices
- PeopleSoft Contracts for Government Contracting: Amending Withholding and Release Terms

Government Contract Progress Payments

The government can issue progress payments to the contractor prior to contract completion. The payments are based on an approved progress payment rate that can be included as terms in a government contract. The contractor issues progress payment requests to the government as costs are incurred. The requests can be issued based on a regular schedule or work progress.

Progress payments are applied to a specific contract, project, or set of project transactions. Use the Projects and Activities page in PeopleSoft Contracts to associate a project and activity to progress payment terms on a contract. The system uses the specified projects and activities to calculate inception to date and estimated costs. Transaction rows that are eligible for progress payments are stored in the Project Transaction table (PROJ_RESOURCE) with analysis types that are associated with the PeopleSoft Inception to Date (PSITD) or PeopleSoft Estimated Costs to Completion (PSECC) analysis groups. The Accumulate Progress Payment Costs Application Engine process (CA_PGP_CALC) in PeopleSoft Contracts retrieves the eligible costs from the Project Transaction table.

Projects and activities that are associated with contract lines are not included in progress payment cost calculations.

Progress payments are applicable only to amount-based contract lines for government contracts.

Related Topics

- PeopleSoft Contracts for Government Contracting: Understanding Progress Payment Amounts
- PeopleSoft Contracts for Government Contracting: Defining Progress Payment Terms
- PeopleSoft Contracts for Government Contracting: Managing Progress Payment Worksheets
- PeopleSoft Contracts for Government Contracting: Managing Progress Payments

Government Contract Variance Pricing

Government contractors typically use provisional rates for billing, because provisional rates are the government-approved rates. They use forward pricing rates for revenue recognition,

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because forward pricing rates represent a more accurate estimate of overhead costs. You may be required to change provisional rates based on a rate review by the government, or you may want to calculate new forward pricing rates based on an internal audit. The adjustments can impact rates and require billing adjustments.

Retroactive rate adjustments, or variance pricing, are required when the government contractor retroactively applies new rates to unprocessed and previously processed transactions. The system applies the difference in rates against historical costs in a specified date range, and creates new transactions for the incremental difference between the old and new rates. For example, assume that since January 1, the overhead rate has been 40 percent. On July 1, the rate changed to 45 percent, retroactive to the beginning of the year. The variance rate, which is the difference of 5 percent, is applied to all costs year-to-date, using standard rate source matching. The system processes the new transaction rows. As part of the Variance Pricing process, the delta rows are priced for revenue and billing based on the rate set or rate plan.

You can use the Variance Pricing feature to capture and process price variances for a particular set of rates for a specific time period. By using the Variance Pricing Application Engine process, you can:

- Process rates that are attached to contract lines or project activities.
- Capture the date and name of the person who made the change.
- Run variance pricing for one or many burden rate types, such as fringe benefits and overhead.
- Run variance pricing on an existing rate set, rate category, or rate plan for a specific contract line or project.
- Capture and process variance pricing for a particular effective dated set of rates.

> **Note**
>
> You can capture and process variance pricing against all rate definition types.

The Variance Pricing Application Engine process (PC_VAR_PRICING) selects the eligible transactions that match the effective date range and source criteria for the costing rate set.

See Understanding Variance Pricing.

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Integrating with Maintenance Management

Understanding Integration with PeopleSoft Maintenance Management

PeopleSoft Maintenance Management is a PeopleSoft Asset Lifecycle Management solution that gives you the tools to plan and schedule maintenance and construction, facilitate the accurate completion of the work, streamline the capture of the results, and automatically process the financial implications of the work. PeopleSoft uses work orders in PeopleSoft Maintenance Management to track the costs associated with maintaining or creating assets.

The PeopleSoft Maintenance Management system uses PeopleSoft Project Costing functionality to gather work order costs from the PeopleSoft Purchasing, Payables, Expenses, and Inventory feeder systems. PeopleSoft Project Costing stores work order costs in the Project Transaction table (PROJ_RESOURCE) and uses the costs to capitalize assets, calculate chargebacks, and provide cost analysis data based on the execution of a work order in PeopleSoft Maintenance Management.

This topic discusses:

- Terminology that is relevant to the integration between PeopleSoft Maintenance Management and PeopleSoft Project Costing.
- Work order tasks and project activities.

Related Topics

- PeopleSoft Maintenance Management: PeopleSoft Maintenance Management Integration with PeopleSoft Project Costing

Terminology

This table describes terms that are relevant to the integration between PeopleSoft Project Costing and PeopleSoft Maintenance Management:

Term	Description
Work Order	A document that authorizes work to be performed and costs to be incurred. Typically, you generate work orders to authorize labor resources to perform construction tasks and maintenance-related activities to create and manage assets.
Work Order Business Unit	An entity that manages work orders. The work order business unit usually has the resources required to perform the work, or can borrow the resources.
Work Order Task	A unit of work on a work order to which an asset can be attached.

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Term	Description
Work Order Resource Type	The work order attribute that classifies resources as *Material, Labor,* or *Tool.*
Project Costing-Managed Project	A project that is actively managed in PeopleSoft Project Costing by a project manager. A Project Costing-managed project is typically created to address any of the following business needs: • Monitoring and managing activity dates, dependencies, resources, percent complete, budgets, and costs. • Managing, budgeting, and reporting on initiatives at a project or program level. • Pooling and analyzing a variety of costs, including work order costs, related to a particular initiative. • Capitalizing disparate development and construction-related costs. • Retiring assets that require a significant amount of cost and effort. Use a Project Costing-managed project when there is an individual in a project manager role, who is engaged in planning the project by creating the project and its activities before actually executing work and incurring costs.
Work Order-Managed Project	A project that is used behind the scenes to enable PeopleSoft Project Costing processes to collect, report, track, and account for costs incurred for work orders and work order tasks. Work order-managed projects are not actively managed in PeopleSoft Project Costing. Instead, the work order drives the processing for a work order-managed project by specifying the accounting rules (capitalization and chargebacks) for these projects. You can create work orders in PeopleSoft Maintenance Management in response to emergency, reactive, or preventive maintenance needs, and associate the work orders with work order-managed projects. PeopleSoft Maintenance Management uses PeopleSoft Project Costing to automatically generate activities in work order-managed projects so that you can collect, summarize, and account for the cost of work order tasks. By using work order-managed projects, you plan and manage activities on the work order, not on the project. For example, a maintenance planner can plan tasks to perform against a maintenance work order, while the work order is associated with a project and activities that the system uses to track costs, capitalize assets, calculate chargebacks, and generate costs for cost analysis.

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Work Order Tasks and Project Activities

Every work order that is associated with a project contains one or more work order tasks. Project activities are used to track the costs of a work order and each work order task. You can create multiple work orders from the same project activity as long as the project is managed in PeopleSoft Project Costing.

You can associate a work order task with only one project and activity. However, you can associate a project activity with many different work orders and work order tasks.

Associate projects and activities with work orders by using one of these methods:

- Associating work orders in PeopleSoft Maintenance Management with existing projects.
- Creating work orders from project activities in PeopleSoft Project Costing.

Associating Work Orders in Maintenance Management with Existing Projects

You can associate a work order with a Project Costing-managed project, a work order-managed project, or the default project that you establish during PeopleSoft Maintenance Management implementation. A project must be associated with the work order business unit on the Work Order - Projects Association page to be eligible for work order creation.

You can associate a work order with a Project Costing-managed project when there is a project manager who is engaged in creating and planning the project and its activities before executing work and incurring costs. Associate a work order with a work order-managed project when you want to enable PeopleSoft Project Costing processes to collect, report, track, and account for costs incurred for work orders and work order tasks behind the scenes. For example, if you create a work order to execute preventive maintenance, you can associate the work order with a work order-managed project that you created for that purpose.

If you do not select an activity to associate with the work order task, the system automatically creates a project activity for the work order task so you can account for the work order costs. The activity start and end dates are based on the estimated start and end dates of the work order task.

After you associate a project and activity with a work order, you can change to a different project and activity for the work order if there are no transaction rows on the work order. When you change to a different project and activity, the system does not copy any other information from PeopleSoft Project Costing to the work order, such as activity start date, activity end date, or resources.

Creating Work Orders from Project Activities in PeopleSoft Project Costing

You can create work orders in PeopleSoft Project Costing from active Project Costing-managed project activities by clicking the **Create Work Order** button on the Activity Definitions - Team page. If PeopleSoft Program Management is installed, click the **Create Work Order** button on the Resources by Activity page.

This diagram shows the process to create a work order from a project activity.

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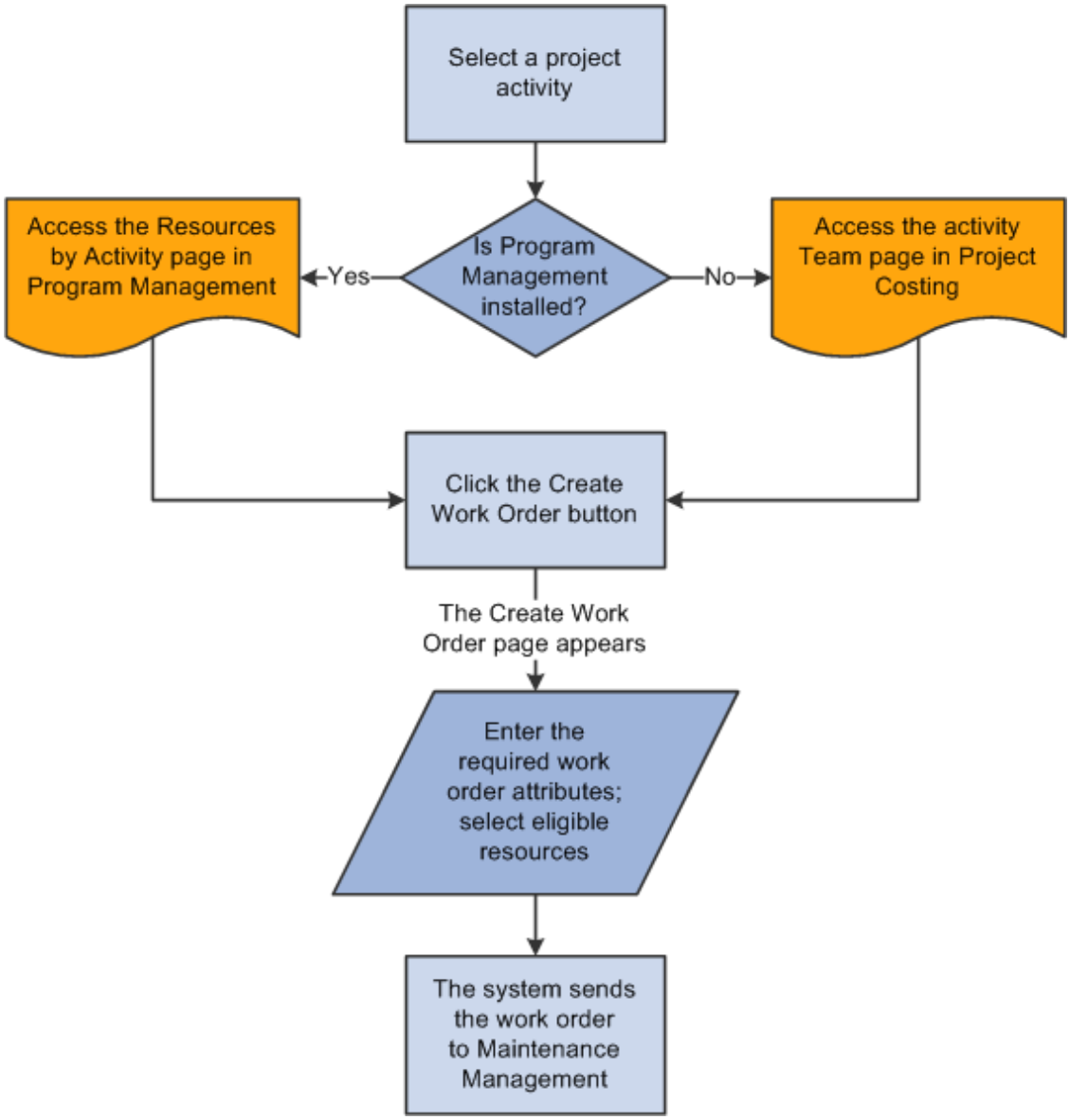

An example of using this method is when an operations or project manager creates a project to build an asset, creates a project activity, and assigns labor, material, or asset tool resources to the activity. The manager can create a work order from PeopleSoft Project Costing to authorize the project team to work on the project.

A work order that you create in PeopleSoft Project Costing is associated with only one project. When you create the work order, the system automatically creates a new work order task, and associates the task with the activity. You can select labor, material, and asset resources on an activity to assign to the work order task. Resources can be associated with multiple work orders for a project activity. Generic labor resources must have a primary craft and be established as eligible resources in PeopleSoft Maintenance Management. Generic material and other resources must have a category.

If you create a work order from a project activity, canceling a work order task does not cancel the associated activity, as other work order tasks may be associated with the activity.

PeopleSoft Project Costing sends labor resources to the work order only if the resource exists in the PeopleSoft Maintenance Management system, and asset resources only if they are

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tools. All rates that PeopleSoft Project Costing sends to the PeopleSoft Maintenance Management system are converted to the work order business unit base currency.

You cannot create a work order in PeopleSoft Project Costing from a work order-managed project.

Understanding Work Order Transaction Processing

This topic discusses:

- Work order labor and tools usage costs.
- Rate options for labor costs.
- Rate options for tools usage costs.
- Maintenance Management Tools Usage process.

Work Order Labor and Tools Usage Costs

PeopleSoft Project Costing uses actual work order time recorded for labor and tools usage to price the transactions for costing or billing. Work order labor transactions share the time capture tables and processes with the PeopleSoft Expenses system, and therefore PeopleSoft Project Costing collects work order labor transactions by using the Expenses to Project Costing Application Engine process (PC_EX_TO_PC). Users enter tools usage directly in PeopleSoft Maintenance Management, and therefore PeopleSoft Project Costing collects work order tools usage transactions by using the Maintenance Management Tools Usage Application Engine process (PC_WM_TO_PC).

Work Order Transactions Associated with Work Order-Managed Projects

The PeopleSoft Project Costing cost collection processes trigger the Pricing process, which assigns a value of *H* (on hold) as the general ledger (GL) distribution status for transactions on open work order tasks that are associated with work order-managed projects. After work order transactions are priced according to the activity rate set and inserted into the Project Transaction table, you can view them on the Transaction List page by searching for transactions in the analysis groups that contain the analysis types that are specified for work order labor or tools usage.

When you close the work order task, the Work Order Close Application Engine process (WM_CLOSE) updates the status to *C* (costed) for transactions that are associated with work order-managed projects. Then you run the Process Project Accounting Application Engine process (PSA_ACCTGGL) to generate the accounting entries. PeopleSoft Project Costing sends transactions to GL for work orders that are associated with work order-managed projects only after the work order tasks are closed. This prevents the Process Project Accounting process from processing transactions for open work order tasks.

Administrators can use the **Rate Selection** and **Rate** fields in the **Project Costing** group box on the Work Order Definition - Integration page in PeopleSoft Maintenance Management to specify the rate set or rate plan that the system uses as a default for chargebacks for work order-managed projects. The default rate set or rate plan on the work order business unit overrides the default project rate set or plan on the project.

Related Topics

- Understanding the Pricing Process
  This topic discusses:

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- Importing Transactions into PeopleSoft Project Costing
  Various PeopleSoft Application Engine processes that are specific to feeder system applications send cost transactions to PeopleSoft Project Costing.
- Importing Time and Expenses into PeopleSoft Project Costing
- Transaction List Page
  Use the Transaction List page (PROJECT_EXPRESSG) to view transactions that belong to a project activity.
- Processing Single-Sided Transactions
- PeopleSoft Maintenance Management: Work Order - Integration Page

Rate Options for Labor Costs

To price transactions by using the cost and bill rates that are defined on the work order task, use the rate options of *WCO* (work order labor cost rate) and *WBI* (work order labor bill rate). By using the *WBI* and *WCO* rate options, you instruct the Pricing Application Engine process (PC_PRICING) to retrieve cost and billing rates from the work order labor rate to calculate the target amount.

Rate Options for Tools Usage Costs

The Maintenance Management Tools Usage process integrates tools usage transactions from PeopleSoft Maintenance Management into PeopleSoft Project Costing. To price transactions for costing and billing by using the tools rates that are defined in PeopleSoft Maintenance Management, you must create a rate set that uses the *TCO* (work order tools usage cost rate) and *TBI* (work order tools usage bill rate) rate options. By using the *TBI* and *TCO* rate options, you instruct the Pricing process to retrieve tools cost and bill rates from the Technician Workbench - Tools Usage page to calculate the target amount.

Maintenance Management Tools Usage Process

Tools usage rows are eligible to be priced by the Maintenance Management Tools Usage process if they:

- Are created from actual tools usage entries.
- Have a PC distribution status of *N* (not distributed), which indicates that the transaction row has not been previously integrated to PeopleSoft Project Costing.
- Meet all run control options.

Run the Maintenance Management Tools Usage process in PeopleSoft Project Costing to price eligible tools usage transactions for costing or billing. At a high-level, the Maintenance Management Tools Usage process completes these steps:

1. Selects eligible rows to process from the Tools Distribution Lines table (WM_WO_DIST_TLS) and updates the PC distribution status (PC_DISTRIB_STATUS) of each row to *H* (Hold).
2. Stamps all retrieved rows with the analysis type that is specified in the Maintenance Management Tools Usage field (AN_TYPE_WM_TU) on the Installation Options - Project Costing Integration page.

   An analysis type of Tools Usage (TUG) is delivered as system data for SetID SHARE for use in pricing PeopleSoft Maintenance Management tools usage costs.
3. Stamps all retrieved rows in the temp table with these values:

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- Billing distribution status (BI_DISTRIB_STATUS) = *N* (not distributed).
- General ledger distribution status (GL_DISTRIB_STATUS) = *I* (ignore).
- Cost distribution status (CST_DISTRIB_STATUS) = *N.*
- Revenue distribution status (REV_DISTRIB_STATUS) = *N.*
- System source (SYSTEM_SOURCE) = *WM.*

4. Validates the open period accounting date on the retrieved rows.
5. Triggers the Pricing Application Engine process (PC_PRICING) to price the rows.
6. Inserts priced rows in the Project Transaction table (PROJ_RESOURCE).
7. Updates the Tools Distribution Lines table in PeopleSoft Maintenance Management with a PC distribution status of *D* (distributed) for each priced row.

Understanding Work Order Asset Capitalization and Retirement

This topic lists prerequisites and discusses:

- Asset capitalization.
- Asset retirement for work order-managed project assets.

Prerequisites

For project assets to be eligible for the Express Retirement process, you must:

- Select the **Work Order Managed** option for the project, and change the project processing status to *Active,* on the Project Definition - General Information page.

  This check box becomes unavailable when you save the Project Definition - General Information page and an activity is associated with the project. If an activity is not associated with the project, and you save the page, the field remains open and available.
- Establish express asset filter criteria for the business unit on the Express Asset Filter Criteria page.
- Select **Derive from Work Order Task** for the project in the **Asset Identification** group box on the Asset Integration Rules page.
- Accumulate costs in PeopleSoft Project Costing directly (using online transaction entry) or indirectly (from feeder systems such as PeopleSoft Payables, Expenses, and Inventory).

> **Note**
>
> Transactions that the PeopleSoft Expenses application sends to PeopleSoft Project Costing do not contain work order-related field values, such as work order business unit, work order ID, work order task ID, work order resource type, and work order line number. Therefore, the Express Asset Retirement Integration process does not include transactions that originate in the PeopleSoft Expenses application unless you manually update the work order-related field values on the transactions in PeopleSoft Project Costing.

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Asset Capitalization

PeopleSoft Maintenance Management maintains assets from work order tasks and relates the assets to projects and activities. You can maintain multiple assets from a single project, or you can consolidate a single asset from multiple projects.

Each work order task can specify one asset that is being maintained, one related project, and one related activity. The task contains the transaction costs of creating and maintaining the asset. These costs flow from PeopleSoft Maintenance Management into various PeopleSoft applications such as PeopleSoft Purchasing, Payables, Time and Expense, and Inventory, and from these systems into PeopleSoft Project Costing.

Related Topics

- Asset Assignment To Multiple Projects
  You can associate the same asset with multiple projects if any of these conditions exist:

Asset Retirement for Work Order-Managed Project Assets

You can use the Express Retirement Application Engine process (PC_EXPRET_AM) to fully retire assets that are associated with work order-managed projects. If a project asset is eligible for the Express Retirement process, this is the process flow for retiring the asset for work order-managed project activities:

1. A user closes the work order task.
2. PeopleSoft Maintenance Management updates values for the project activity on the Asset Integration Rules page to synchronize the PeopleSoft Project Costing and PeopleSoft Maintenance Management systems.
3. The work order closed status triggers the Express Retirement process and indicates to the system that the project activity is ready to process.
4. The Express Retirement process determines the assets to send to PeopleSoft Asset Management, stamps the Project Transaction table rows with asset information, and initiates the Asset Retirement Integration Application Engine process (PC_RETIRE_AM).

Related Topics

- Asset Retirement for Work Order-Managed Project Activities
  You can use the Express Retirement process to fully retire assets that are associated with work order-managed projects. You cannot partially retire assets that are associated with work orders.

Understanding Integration Setup

You use pages in both PeopleSoft Maintenance Management and PeopleSoft Project Costing to set up the integration between these systems. This table lists the integration setup steps, the application pages used to accomplish the steps, and the applications that own the pages:

Step	Application Page	Owner Application
Select the **Enable Organization** option if you want to use the chargeback feature.	Installation Options - Project Costing (INSTALLATION_PC)	PeopleSoft Project Costing See Application Fundamentals: Installation Options - Project Costing Page.

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Step	Application Page	Owner Application
Map work order business units to project business units.	Work Order Definition - Integration (BUS_UNIT_TBL_WM2)	PeopleSoft Maintenance Management See PeopleSoft Maintenance Management: Work Order - Integration Page.
Map work order-managed projects and business units to work order business units.	Work Order - Projects Association (WM_PC_DFLT_PRJ)	PeopleSoft Maintenance Management See PeopleSoft Maintenance Management: Work Order Project ChartField Mapping Page.
Map project-related ChartFields to work order business units.	Work Order Project Chart field Mapping (WM_PC_DFLT_CFS)	PeopleSoft Maintenance Management See PeopleSoft Maintenance Management: Work Order Project ChartField Mapping Page.
Define minimum capitalization limits that must be met before PeopleSoft Project Costing capitalizes selected assets.	WO Capitalization Limit (WM_PC_CAP_INTGRTN)	PeopleSoft Maintenance Management See PeopleSoft Maintenance Management: WO Capitalization Limit Page.
Define capitalization rules that associate adjustment filters and retirement filters with project business units and asset types.	WO Capitalization Filter (WM_PC_CAP_FLTR)	PeopleSoft Maintenance Management See PeopleSoft Maintenance Management: WO Capitalization Filter Page.
Set up rate sets that use *WBI*, *WCO*, *TBI*, and *TCO* rate options. Set up rate plans that contain the appropriate rate sets that use these work order-specific rate options.	Rate Sets (PC_RATE_DTL) and Rate Sets - Target (PC_RATE_DTL_LN) Rate Plans (PC_RATE_PLAN)	PeopleSoft Project Costing See Defining Rate Set Categories, Rate Sets, and Rate Plans.
Specify a standard rate set or rate plan that the business unit uses as a default for chargebacks for work order-managed projects.	Work Order Definition - Integration (BUS_UNIT_TBL_WM2)	PeopleSoft Maintenance Management See PeopleSoft Maintenance Management: Work Order - Integration Page.

Understanding the PeopleSoft Project Costing Pages Used in Work Order Business Processes

This table summarizes the PeopleSoft Project Costing application pages that work order business processes use:

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Project Costing Application Pages and Processes	How the Page or Process Is Used in Work Order Business Processes
Asset Integration Rules page	Use this page to select the **Derive from Work Order Task** asset identification rule option to enable the Express Capitalization process to identify the transaction rows in activities that belong to assets. Additionally, the system automatically updates certain fields on this page during the life of a work order-managed project, such as: • When you save a project as a work order-managed project, the system automatically selects the asset identification rule of **Derive from Work Order Task** and the adjustment trigger of **Automatic.** • If the **Work Order Managed Project** option is activated for a project, and if assets do not require approval before they are sent to PeopleSoft Asset Management, the system selects an asset processing destination of *Summarize and Run Interface* on the Asset Integration Rules page. • When you change a work order task status to complete, the system updates these fields at the activity level to reflect the criteria in PeopleSoft Maintenance Management: – Selects the **Enable Integration** option. – Selects an integration type of *Retirement.* – Enters a value in the**Filter ID** field. • If the **Work Order Managed** option is activated for a project, the system: – Selects an asset adjustment trigger of **Automatic.** – Selects a transaction load type of **Adjust Cost/Acquisition Detail.** – Selects an end-of-year rule of **Ignore End of Year.** See Project Costing Options - Asset Integration Rules Page.
Define Assets page	Use this page to view the details of asset definitions that are associated with work order-managed projects.
Relate by Project page	Use this page to view the details of the relationship of assets to projects for assets that are associated with work order-managed projects.

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Project Costing Application Pages and Processes	How the Page or Process Is Used in Work Order Business Processes
Project Definitions - General Information page	Use this page to designate the project as a work order-managed project, which indicates that the project is managed with work orders in PeopleSoft Maintenance Management, instead of by a project manager in PeopleSoft Project Costing. Additionally, you can click links in the **More** drop-down list box on the Project Definitions - General Information page to access: • The Work Order Project Chart field Mapping page for a business unit, work type, and service group combination to specify default project ChartField values for work order tasks. • The Work Order - Projects Association page to specify default work order values on projects. See Creating and Defining Projects.
Project Costing Activity Definitions - Team page or Program Management Resources by Activity page	On this page you can click a button to access the Create Work Order page to create a work order in PeopleSoft Maintenance Management for this project activity. See Creating Project and Activity Teams.
Create Work Order page	Use this page to create a work order from a Project Costing-managed project activity. See Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing.
Work Orders page	View a list of all work orders that are associated with a Project Costing-managed activity and drill into each individual work order.
Show All Transaction Details page	View the work order business unit, work order number, task number, resource type, and resource line number for a transaction. See Viewing and Adding Transactions.
Express Retirement Process page	Use this page to run the Express Retirement Application Engine process (PC_EXPRET_AM) to send assets that are associated with work order-managed projects to the PeopleSoft Asset Management Loader table and (optionally) to the PeopleSoft Asset Management production tables. See Express Retirement Process Page.
Maintenance Management Tools Usage page	Use this page to run the Maintenance Management Tools Usage process to price eligible tools usage transactions for costing or billing.

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Project Costing Application Pages and Processes	How the Page or Process Is Used in Work Order Business Processes
Pricing process	This Application Engine process calculates labor and tools usage cost and billing amounts by using the work order labor and tools usage cost rates and bill rates. Additionally, the process holds transactions that are associated with work order-managed projects so that the Process Project Accounting process does not process them until the work order task closes. See Running the Pricing Application Engine Process.

Setting Up Rate Sets and Asset Integration Rules

You use pages in PeopleSoft Maintenance Management and PeopleSoft Project Costing to set up the integration. This topic discusses the setup pages that are in PeopleSoft Project Costing only.

Pages Used to Set Up Rate Sets and Asset Integration Rules

Page Name	Definition Name	Usage
Rate Sets Page	PC_RATE_DTL	Enter a row with an analysis type that is specified in the **Mobile Time** / **Expense** field on the Installation Options - Project Costing Integration page, which enables you to select the *WBI* and *WCO* rate options for work order-managed projects on the Rate Sets - Target page.
Rate Sets - Target Page	PC_RATE_DTL_LN	Select the *WCO* and *WBI* rate options to price transactions by using the cost and bill rates that are defined on the work order task. Select the *TCO* and *TBI* rate options to price transactions by using the cost and bill rates that appear on the Technician Workbench - Tools Usage page for actual tools usage.
Project Costing Options - Asset Integration Rules Page	PC_AM_RULE_BU	Select the **Derive from Work Order Task** asset identification rule option to enable the Express Capitalization process at the business unit level.
Project Definitions - Asset Integration Rules Page	PC_AM_RULE_PRJ	Select the **Derive from Work Order Task** asset identification rule option to enable the Express Capitalization process at the project level.

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Page Name	Definition Name	Usage
Activity Definitions - Asset Integration Rules Page	PC_AM_RULE_ACT	Select the **Derive from Work Order Task** asset identification rule option to enable the Express Capitalization process at the activity level.

Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing

Pages Used to Create Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing

Page Name	Definition Name	Usage
Create Work Order Page	PC_CREATE_WO	Create a work order for a Project Costing-managed project. The **Create Work Order** button is available on the Activity Definitions - Team page only for active Project Costing-managed projects.
Work Orders Page	PC_LINK_WO	View a list of all work orders that are associated with a Project Costing-managed activity and drill into each individual work order.
Project Definitions - General Information Page	PROJECT_GEN_01A	Designate a project as a work order-managed project, and access work order-related pages in PeopleSoft Maintenance Management.

Create Work Order Page

Use the Create Work Order page (PC_CREATE_WO) to create a work order for a Project Costing-managed project.

Navigation:

Project Costing, and then **Activity Definitions**, and then **Team**, and then **Team**. Click **Create Work Order** on the Activity Definitions - Team page in Project Costing, or the Resources by Activity page in Program Management.

This example illustrates the fields and controls on the Create Work Order page.

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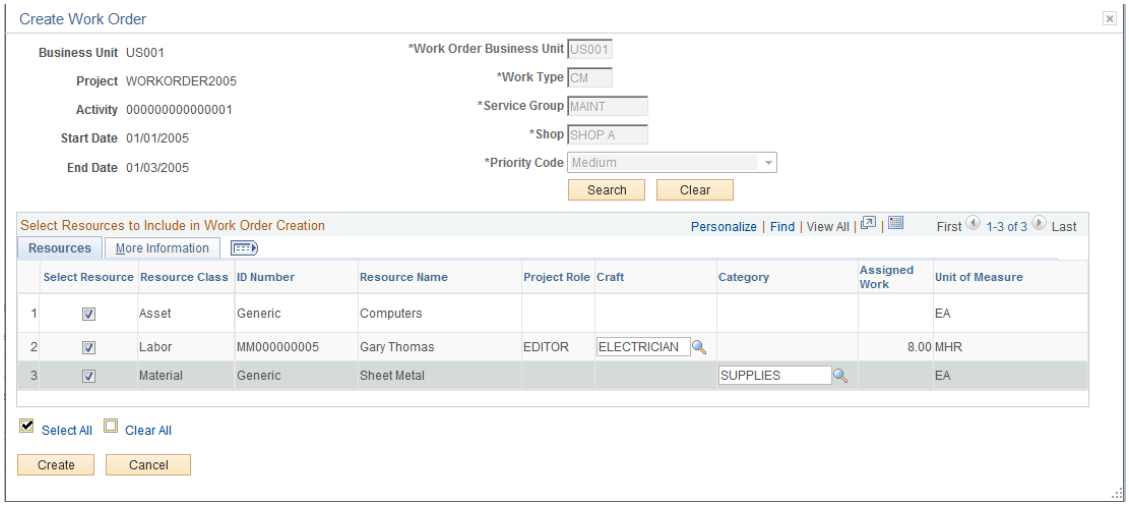

The project must be associated with the work order business unit on the Work Order - Projects Association page in the PeopleSoft Maintenance Management system before you can create a work order by using this page.

The system populates the project business unit, project, activity, start date, and end date from the project activity. These fields are not editable.

Field or Control	Description
Work Order Business Unit	Enter a business unit from the list of work order business units that are mapped to the project business unit.
Work Type	Enter a work type that is associated with this work order business unit and project in PeopleSoft Maintenance Management. Values appear here only if the relationship is defined on the Work Order - Projects Association page in PeopleSoft Maintenance Management.
Service Group	Enter a service group that is associated with this work order business unit and project in PeopleSoft Maintenance Management. The service group performs the work order service. Values appear here only if the relationship is defined on the Work Order - Projects Association page in PeopleSoft Maintenance Management.
Shop	Enter a shop from a list of valid shops that are defined in PeopleSoft Maintenance Management. Values appear for selection if they are associated with the selected service group.
Priority Code	Enter a work order priority, such as *High*, *Medium*, or *Low*, that is valid for the work order business unit.

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Field or Control	Description
Search	Click to search for resources that are valid for the work order business unit, work type, service group, and shop that you entered on this page, and that exist on the Activity Definitions - Team page in PeopleSoft Project Costing or the Resources by Activity page in PeopleSoft Program Management. Search results appear in the **Select Resources to Include in Work Order Creation** grid. You cannot change the work order business unit, work type, service group, shop, and priority code until you clear the search results.
Clear	Click to clear the search results from the **Select Resources to Include in Work Order Creation** grid. This enables you to change the work order business unit, work type, service group, shop, and priority code, and perform another search.

Select Resources to Include in Work Order Creation

If you use PeopleSoft Project Costing without PeopleSoft Program Management, you can select named labor resources that appear in this grid, and exist in PeopleSoft Maintenance Management as labor resources, to include on the work order.

If you use PeopleSoft Program Management, you can select any of these resources that appear in the grid:

- Named resources that exist in the PeopleSoft Maintenance Management system as labor resources.
- Asset resources that are defined as tools in the PeopleSoft Maintenance Management system.
- Material resources.
- All generic resources (labor, material, asset, and other) that exist on the activity.

Resources

Field or Control	Description
	Indicates that the corresponding resource is assigned to another work order that is created from this project activity. **Note:** If a resource is associated with the work order, the icon still appears even if the work order is subsequently canceled. If you create a work order for a generic resource, and subsequently replace the generic resource with a named resource, the icon will not appear for the named resource.
Select Resource	Select the check box to copy the corresponding resource to the PeopleSoft Maintenance Management work order when you create the order. You can associate a resource with one or more work orders for a project activity.

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Field or Control	Description
Craft	Enter the craft ID from available values in the Craft Description table (RS_CRAFT_DETAIL). If the project role of the labor resource has an associated craft, the system automatically populates this field. This field appears only for named and generic labor resources. A craft is required for generic labor resources.
Category	Displays the category from available values in the Category Codes table (ITM_CAT_SET_VW). This field is required for resources with a resource class of Material or Other. For named material resources, the system populates this field with the category that is associated with the material. This field is only available if you use PeopleSoft Program Management.
Assigned Work	Displays the assigned work for the resource for the corresponding activity. This field is available only if you use PeopleSoft Program Management.
Unit of Measure	Displays the unit of measure for the resource for the corresponding activity. This field is available only if you use PeopleSoft Program Management.

More Information

You cannot edit the information that appears in this grid.

Field or Control	Description
Asset Type, Asset Subtype, Manufacturer ID, and **Model**	Displays information about asset resources. These fields are blank for all labor, material, and other resource classes. These fields are available only if you use PeopleSoft Program Management.
Inventory Item	Indicates if a named material resource is an inventory item or a purchase-on-hand item. This field is available only if you use PeopleSoft Program Management.
Create	Click to send the information on the Create Work Order page to PeopleSoft Maintenance Management to create a work order with one work order task. The system returns you to the Activity Definitions - Team page or the Resources by Activity page. **Note:** The system creates a work order even if you do not select resources to include on the work order.
Cancel	Click to return to the Activity Definitions - Team page or the Resources by Activity page without creating a work order or work order task.

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Related Topics

- PeopleSoft Maintenance Management: Work Order Creation from PeopleSoft Project Costing

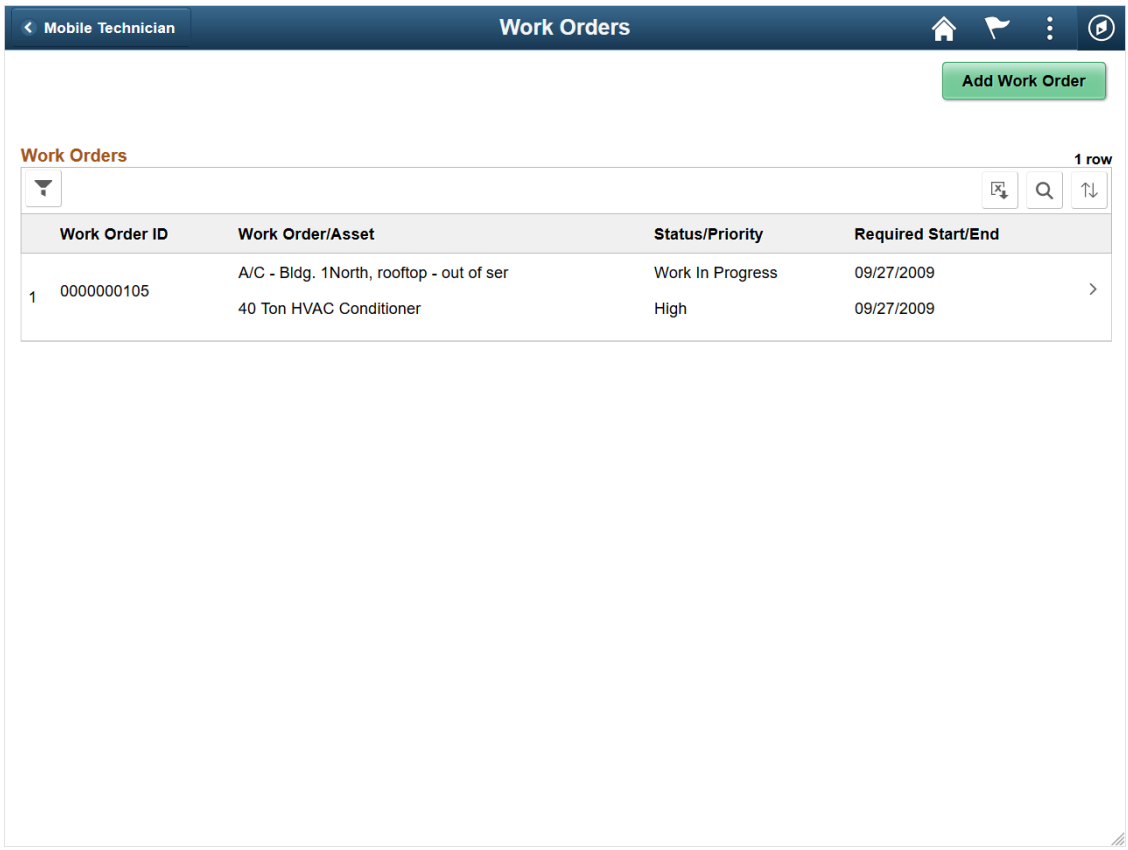
Work Orders Page

Use the Work Orders page (PC_LINK_WO) to view a list of all work orders that are associated with a Project Costing-managed activity and drill into each individual work order.

Navigation:

Click **View Work Order** on the Activity Definitions - Team page in Project Costing, or the Resources by Activity page in Program Management.

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



Click the work order link to access the work order in the PeopleSoft Maintenance Management system. The link appears if all of these conditions exist:

- PeopleSoft Maintenance Management is installed.
- The project's processing status is Active.
- The project is not work order-managed.
- The project is associated with a work order business unit on the Work Order - Projects Association page.

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Pricing Work Order Costs

Pages Used to Price Work Order Costs

Page Name	Definition Name	Usage
Pricing Page	PC_PRICING	Run the Pricing process to price or reprice transactions.
Maintenance Management Tools Usage Page	PC_WM_TO_PC	Run the Maintenance Management Tools Usage process to bring tools usage transactions into PeopleSoft Project Costing from PeopleSoft Maintenance Management and price eligible tools usage transactions. You can run the process for all dates, or further narrow the selection of transactions to a specified accounting date range or transaction date range. To access this page, select **Project Costing**, and then **Cost Collection**, and then **Cost Collect Maintenance Mgmt**, and then **Maintenance Management Tools Usage**

Retiring Work Order Assets

Page Used to Retire Work Order Assets

Page Name	Definition Name	Usage
Express Retirement Process Page	RUN_PC_EXP_RET	Run the Express Retirement process to retire assets that are associated with work order-managed projects.

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Integrating with PeopleSoft Receivables

Understanding Integration with PeopleSoft Receivables

Integration with PeopleSoft Receivables provides you with accounts receivable items and revenue-related adjustments. By gaining access to information on the progress of a project, such as outstanding revenue, project managers have financial control of the project.

Rows are eligible to distribute from PeopleSoft Receivables to PeopleSoft Project Costing if they have:

- A PC Distribution Status field (PC_DISTRIB_STATUS) value of *N* (not distributed) in the Item Activity table (ITEM_ACTIVITY).
- Values for project business unit, project, activity, and any other required project-related ChartField.
- A Receivables entry type that relates to revenue adjustments.

  This table lists the types of adjustments that PeopleSoft Project Costing captures:

Receivables Entry Type	Description
FC-01	Create an overdue charge.
IT-01	Create an invoice/debit memo.
IT-02	Create a credit memo.
MT-03	Write off a debit.
MT-04	Create a new debit.
MT-07	Write off a remaining debit.
WS-02	Take earned discount.
WS-03	Take unearned discount.
WS-08	Create a deduction.
WS-09	Write off an item.
WS-11	Write off an underpayment.

Use the Receivables Adjustments Application Engine process (PC_AR_TO_PC) to move data from PeopleSoft Receivables to PeopleSoft Project Costing. This process copies the information into the Project Transaction table (PROJ_RESOURCE) in PeopleSoft Project Costing, and updates the PC distribution status to *D* (distributed) in the Item Activity table in PeopleSoft Receivables.

Related Topics

- PeopleSoft Receivables: Understanding the Receivables Update Application Engine Process
- PeopleSoft Receivables: Setting Up Item and Automatic Entry Types for Revenue Estimate Processing
- PeopleSoft Receivables: PeopleSoft Project Costing Integration

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- PeopleSoft Billing: Setting Up Bill By Identifiers for External Sources

Integrating PeopleSoft Receivables Adjustments into PeopleSoft Project Costing

Page Used to Integrate PeopleSoft Receivables Adjustments into PeopleSoft Project Costing

Page Name	Definition Name	Usage
Adjustments from Receivables Page	PC_AR_TO_PC	Run the Receivables to Project Costing process to import receivables adjustment data into PeopleSoft Project Costing.

Adjustments from Receivables Page

Use the Adjustments from Receivables page (PC_AR_TO_PC) to run the Receivables to Project Costing process to import receivables adjustment data into PeopleSoft Project Costing.

Navigation:

Project Costing, and then **Revenue Collection**, and then **Revenue Adjustments from AR**

Field or Control	Description
Option	Select to import transactions for all projects and activities, or for specific ones. Options are: *All:* Processes all transactions that are associated with all activities. *Business Unit:* Processes transactions for the selected business unit. *Business Unit/Project:* Processes transactions for the selected business unit and project. *Business Unit/Project/Activity:* Processes transactions for the selected business unit, project, and activity.
Transaction Detail	After the system successfully completes the Receivables to Project Costing process, click **Transaction Detail** to access the Transaction List page and view the latest receivables adjustments in the Project Transaction table.
Run	Click to initiate the request to move receivables data to the Project Transaction table. Receivables adjustments appear as transactions with the analysis type that is specified in the Installation Options - Project Costing Integration page for **Receivables Adjustment.**

See the product documentation for *PeopleTools: Process Scheduler*

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Summarizing and Archiving Project Data

Understanding the Data Summary Process

In PeopleSoft Project Costing, you summarize data before you archive it. You use the Project Data Compression Application Engine process (PC_COMPRESS) to summarize project data into history tables. Then, you use the PeopleSoft Archive (PSARCHIVE) process to archive data from the history tables.

This topic discusses:

- Summarization process flow.
- Tables populated by the Project Data Compression process.
- Summary transactions.
- Project compression log.

PeopleSoft Project Costing keeps all life-to-date transactions for each project, resulting in a high volume of data to manage. To reduce storage needs and increase performance, you can summarize transaction data by using the Project Data Compression Application Engine process that retains project costs while deleting some detail and integration information.

The Compress Project Data (PC_COMPRESS) process compresses project transactions based on parameters from the run control. This process:

1. Selects the transactions that are targeted for compression and saves them in history tables.
2. Creates summary transactions and inserts them into the project transactions table.
3. Deletes the original transactions from the project transaction table.

Summarization Process Flow

This diagram shows the Project Data Compression process, which consists of six steps.

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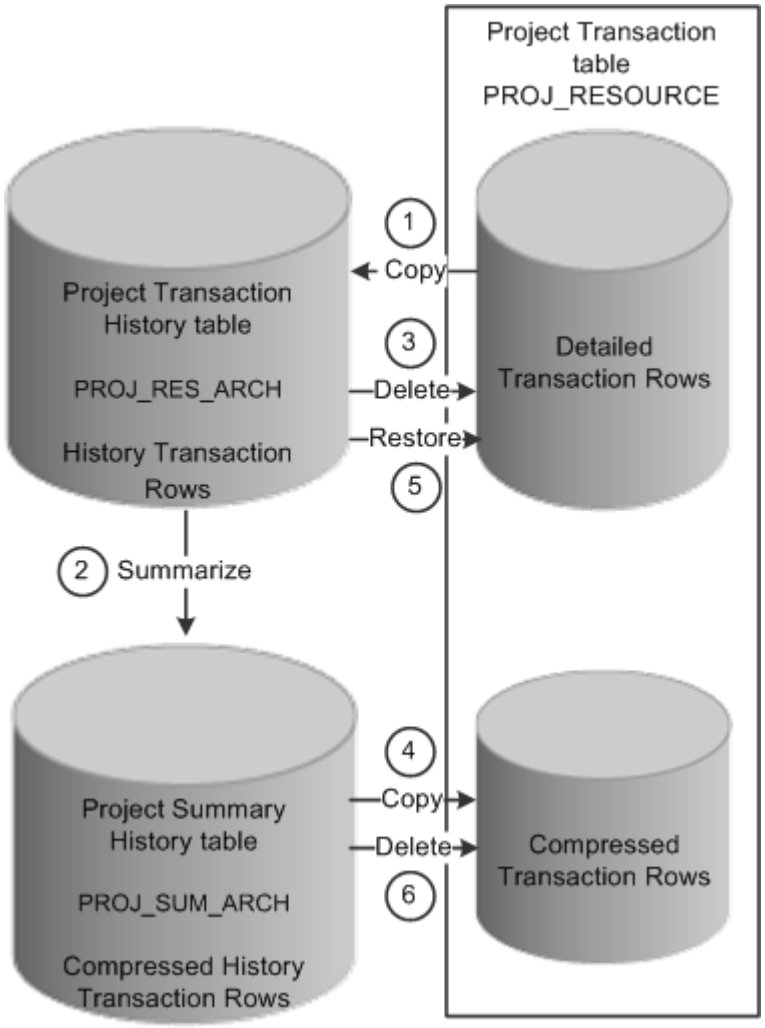

The data compression and restoration process flow that the system performs is:

1. Copy the detailed transaction rows based on the compression template and run control options from the Project Transaction table (PROJ_RESOURCE) to the Project Transaction History table (PROJ_RES_ARCH).
2. Summarize detailed transaction rows in the Project Transaction History table and copy them to the Project Summary History table (PROJ_SUM_ARCH).
3. Delete the original transactions from the Project Transaction table.
4. Copy summarized transactions in the Project Summary History table to the Project Transaction table.
5. Restore rows from the Project Transaction History table to the Project Transaction table as detailed rows.
6. Delete compressed rows in the Project Transaction table.

See the product documentation for *PeopleTools: Data Management*

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Tables Populated by the Project Data Compression Process

The Project Data Compression process stores data in transaction history and summary tables. The process updates these tables when you summarize data from the Project Transaction table:

- Project Transaction History (PROJ_RES_ARCH)
- Project Summary History (PROJ_SUM_ARCH)
- Project Resource (PROJ_RESOURCE)
- Project Compression Log (PC_COMPRESS_LOG)

Summary Transactions

The Project Data Compression process summarizes transaction data based on run control parameters, such as date, analysis group, contract, or customized SQL. The Project Data Compression process should be performed only on completed projects and activities. The system does not check the status of a project or activity before running the Project Data Compression process.

A compression template is used to define how project transactions are to be summarized during the process. The template enables users to choose the dates they want to roll up and the rollup calendar. Microsoft and Sybase database platforms have a limit of 32 fields of detail.

For example, a compression template is created using these parameters:

- **Date Roll up Level** is *Monthly.*
- **Roll up Date to Use** is *Start of Period.*
- **Calendar ID** is *01 Monthly.*
- **Dates Selected** are *Accounting Date* and *Transaction Date.*

The 01 Monthly Calendar for year 2007 is set up:

- Period 01: January 01, 2007 to January 31, 2007
- Period 02: February 01, 2007 to February 28, 2007
- And so on

Before the compression process runs, the detail rows in the PROJ_RESOURCE table are:

Business Unit	Project	Activity	Amount	Acct Date	Transaction Date
US004	ABC	001	100.00	01/01/2007	01/05/2007
US004	ABC	001	200.00	01/15/2007	01/15/2007
US004	ABC	001	500.00	02/02/2007	01/31/2007
US004	ABC	001	600.00	02/28/2007	02/28/2007
US004	ABC	001	100.00	02/28/2007	02/01/2007

After the compression process runs, the detail rows in PROJ_RESOURCE table are:

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Business Unit	Project	Activity	Amount	Acct Date	Transaction Date
US004	ABC	001	300.00	01/01/2007	01/01/2007
US004	ABC	001	500.00	02/01/2007	01/01/2007
US004	ABC	001	700.00	02/01/2007	02/01/2007

Project Compression Log

The system logs each compression run in the PC_COMPRESS_LOG table. The log retains compression details such as run date, parameters used, and status. Additional details, such as date option, analysis group, contract, and SQL, are logged if used.

The compression log enables the user to perform actions such as viewing history or archiving, purging, restoring, and rolling back data.

Understanding Feeder and Pricing Summarization

This topic discusses:

- The Feeder Transaction Summary process.
- The Pricing Summary process.
- An example to feeder transaction summarization.

The Feeder and Pricing Summarization feature is an optional feature. It reduces the amount of transactions that are written to the Project Costing transaction table (PROJ_RESOURCE) using summarization templates that are specific to various product interface processes and the Project Costing Pricing process.

Feeder and pricing summarization is defined at the installation level. You determine whether you are going to summarize transactions from feeder products such as PeopleSoft Expenses, PeopleSoft General Ledger, Time and Labor, and so on. You also determine whether you are going to summarize transactions during the Project Costing Pricing and Variance Pricing processes.

After you determine the areas in which you want to summarize your data, you must set up summarization templates. Summarization templates must be defined for each area defined on the Project Costing Integration page. You determine the fields in which the system uses for summarization and the level that the data is summarized.

When you run the integration and pricing processes, the system uses the summarization templates to reduce the number of transaction rows that are written to PROJ_RESOURCE.

The Feeder Transaction Summary Process

When running an integration process, such as PC_EX_TO_PC, the data is added to a new staging table PC_xx_DETAIL, where xx is the product abbreviation, such as PC_EX_DETAIL. The integration process looks for a transaction summarization template to determine the summarization rules. If a transaction summarization template is found, the integration process uses the rules to summarize the data that is inserted into the project transaction table (PROJ_RESOURCE).

A benefit of the detail table is that you can drill back to the detail when viewing transactions on the Transaction List page.

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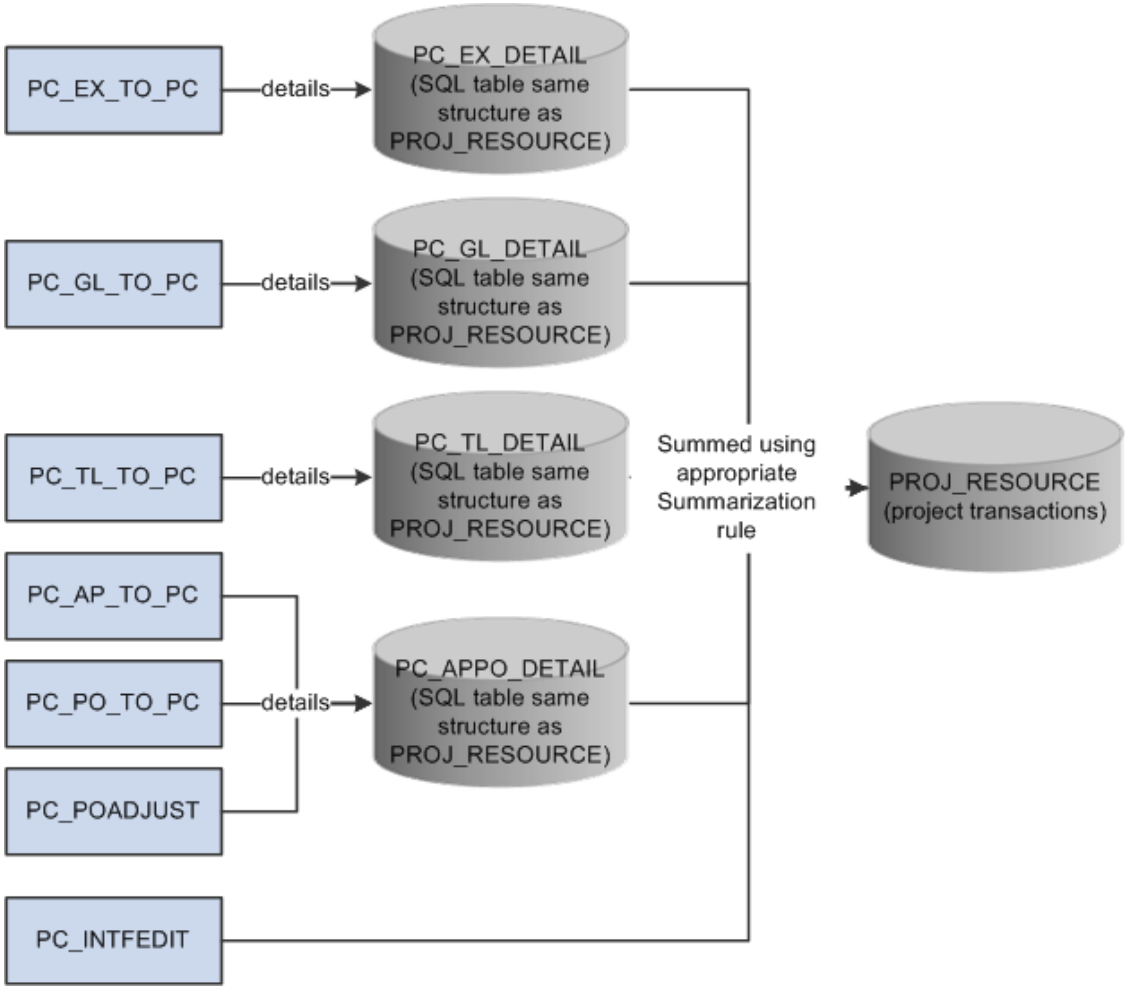
> **Note**
>
> When running the third-party integration process, there are no corresponding detail tables. Summarized transactions are loaded directly into the project transaction table and there is no drill back capability because the detail exists on another system.

This diagram illustrates the process flow of the PeopleSoft Expenses, Time and Labor, General Ledger, and Third-Party interface processes:

This diagram illustrates that each application engine process for the corresponding feeder application, sends detailed information to the corresponding detail table. If summarization is being used (the application check box is selected in the Summarization Options section on the Installation Options – Project Costing Integrations page), then the detailed data is summarized and then added to the Project Costing transaction table (PROJ_RESOURCE).



Application Engine Process	Detail Table
PC_EX_TO_PC	PC_EX_DETAIL
PC_GL_TO_PC	PC_GL_DETAIL

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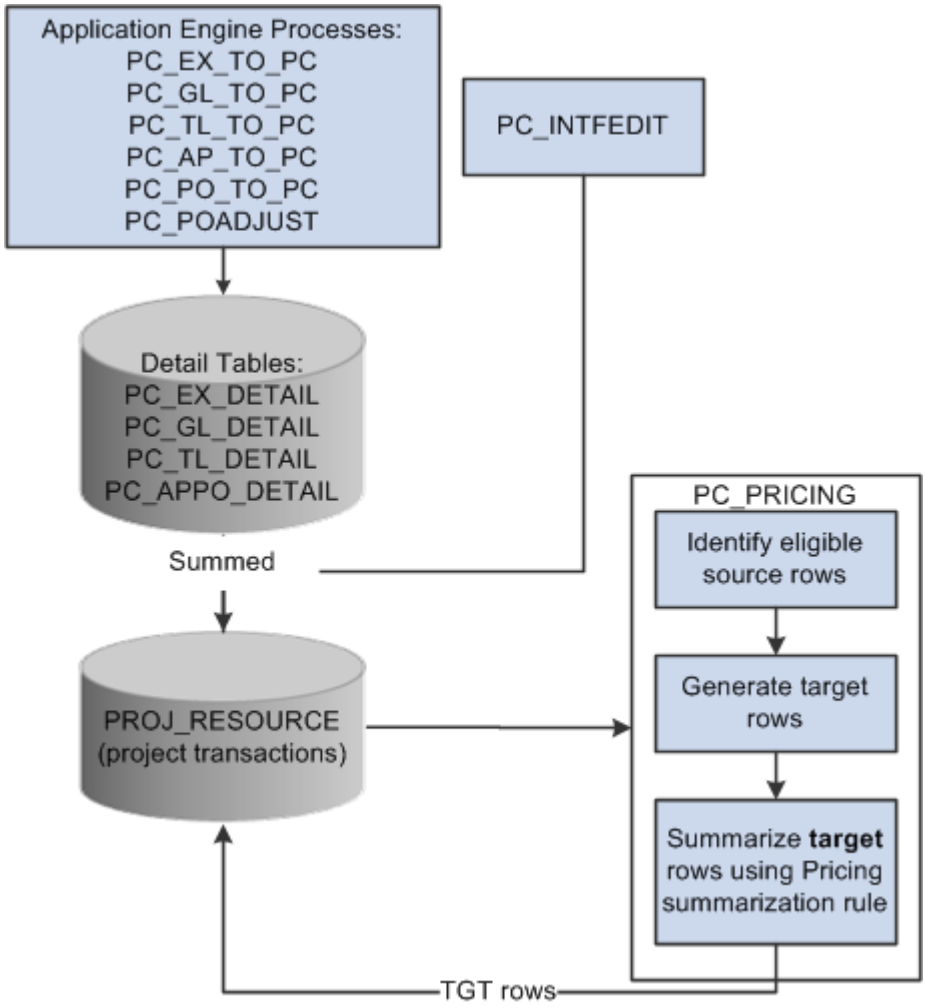
Application Engine Process	Detail Table
PC_TL_TO_PC	PC_TL_DETAIL
PC_AP_TO_PC, PC_PO_TO_PC, and PC_POADJUST	PC_APPO_DETAIL
PC_INTFEDIT	This process loads detail directly to PROJ_RESOURCE

The Pricing Summary Process

When the Pricing process (PC_PRICING) runs, the process takes transactions from the project transaction table (PROJ_RESOURCE) and identifies source rows that are eligible for pricing. The process then generates target rows and looks for a pricing summarization template. If a pricing summarization template is found, the process uses the pricing summarization rule to summarize the data, create target rows, and update the project transaction table (PROJ_RESOURCE).

This diagram illustrates the process flow of the Project Costing pricing summarization process when pricing is called separately from the feeder interface process.



This diagram illustrates the process flow of the Project Costing pricing summarization process when the Pricing process is called with an individual feeder interface process.

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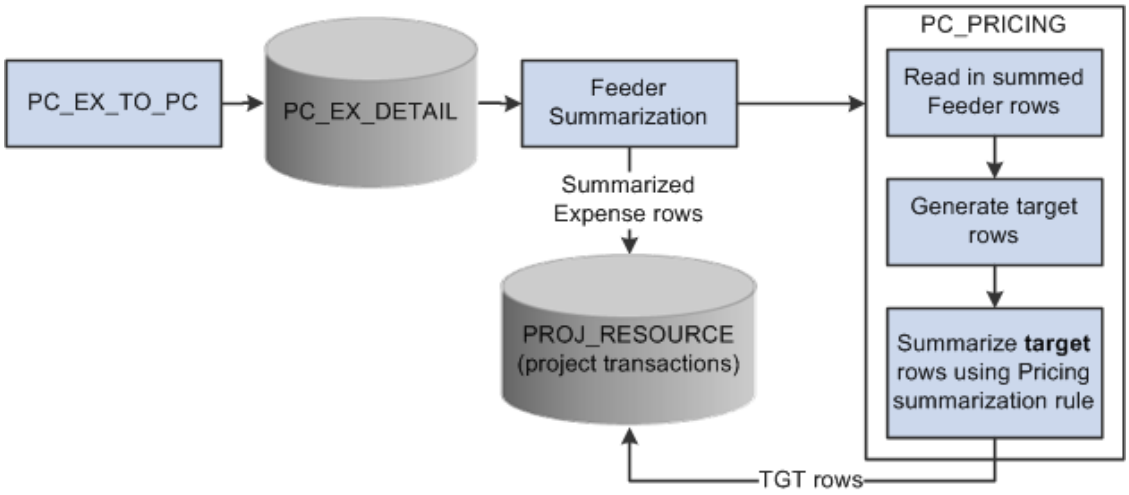

> **Note**
>
> The Pricing Options group box, on the Project Costing Options page, determines if the Pricing process runs directly from the feeder interface processes.

The Purchasing and Payables to Project Costing Process

When the Purchasing to Project Costing process (PC_PO_TO_PC) is run, the summarization application engine process is called to summarize requisitions, purchase orders, and reversals. The rows are summarized based on the Payables/Purchasing summarization template.

It is important to understand that there are differences in the way the process handles these two tasks:

- Updates:
  - When not using summarization, the PC_PO_TO_PC and the PC_POADJUST processes automatically update PROJ_RESOURCE.

    If an update comes from a requisition or a purchase order, the processes delete the existing (original) transaction from PROJ_RESOURCE and insert the new transaction.
  - When using summarization, updates are generated off of the detail row in PC_APPO_DETAIL and sent to PROJ_RESOURCE.

    The system creates a new resource ID, a negative amount, and a negative quantity from the original row, which reverses the old row. The system then adds the new transaction to summarized rows.

    The original row of the update cannot be deleted from PROJ_RESOURCE because the PROJ_RESOURCE row is the result of summarizing more than one row together.
- Resource IDs:
  - When not using summarization for Purchasing, the resource ID is assigned using SQL objects PC_COM_RESID_PO and PC_COM_RESID_REQ.

    For purchase orders, the system concatenates the Purchasing business unit, purchase order ID, line number, schedule number, distribution account type, and distribution line number.

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For requisitions, the system concatenates the Purchasing business unit, requisition ID, line number, schedule number, and distribution line number.

Concatenated resource IDs can be found by clicking the Drill to Source button from the Transaction List page, or on the Maintain Requisitions page.

– When using summarization for Payables and Purchasing, the system automatically generates resource IDs using auto-numbering for RESOURCE_ID.

Example of Feeder Transaction Summarization

This example shows the difference in the amount of rows that are written to the Project Transaction table when not using transaction summarization templates versus when using transaction summarization templates. The actual level of summarization and the number of transactions that are written to the Project Transaction table is determined by the applicable summarization template.

> **Note**
>
> Field names have been abbreviated in these examples.

When not using transaction summarization templates, these three transactions are written to the Project Transaction table (PROJ_RESOURCE):

ACTIVITY	RES_ID	RES_ID_FROM	CONT	AN_TYPE	SHEET_ID	LINE_NBR	AMOUNT	FEEDER_SUM_ID
A1	201	201	CN1	ACT	EX1	1	100.00	
A1	202	202	CN1	ACT	EX1	2	100.00	
A1	203	203	CN1	ACT	EX2	1	100.00	

When using transaction summary templates for expense transactions, these transactions are written to the Expense Detail table (PC_EX_DETAIL):

ACTIVITY	RES_ID	RES_ID_FROM	CONT	AN_TYPE	SHEET_ID	LINE_NBR	AMOUNT	FEEDER_SUM_ID
A1	201	201	CN1	ACT	EX1	1	100.00	100
A1	202	202	CN1	ACT	EX1	2	100.00	100
A1	203	203	CN1	ACT	EX2	1	100.00	101

When using transaction summary templates for expense transactions, these transactions are written to the Project Transaction table (PROJ_RESOURCE):

ACTIVITY	RES_ID	RES_ID_FROM	CONT	AN_TYPE	SHEET_ID	LINE_NBR	AMOUNT	FEEDER_SUM_ID
A1	201	201	CN1	ACT	EX1	0	200.00	100
A1	203	203	CN1	ACT	EX2	0	100.00	101

Understanding the Data Archive Process

This topic lists a prerequisite and discusses the archive process flow.

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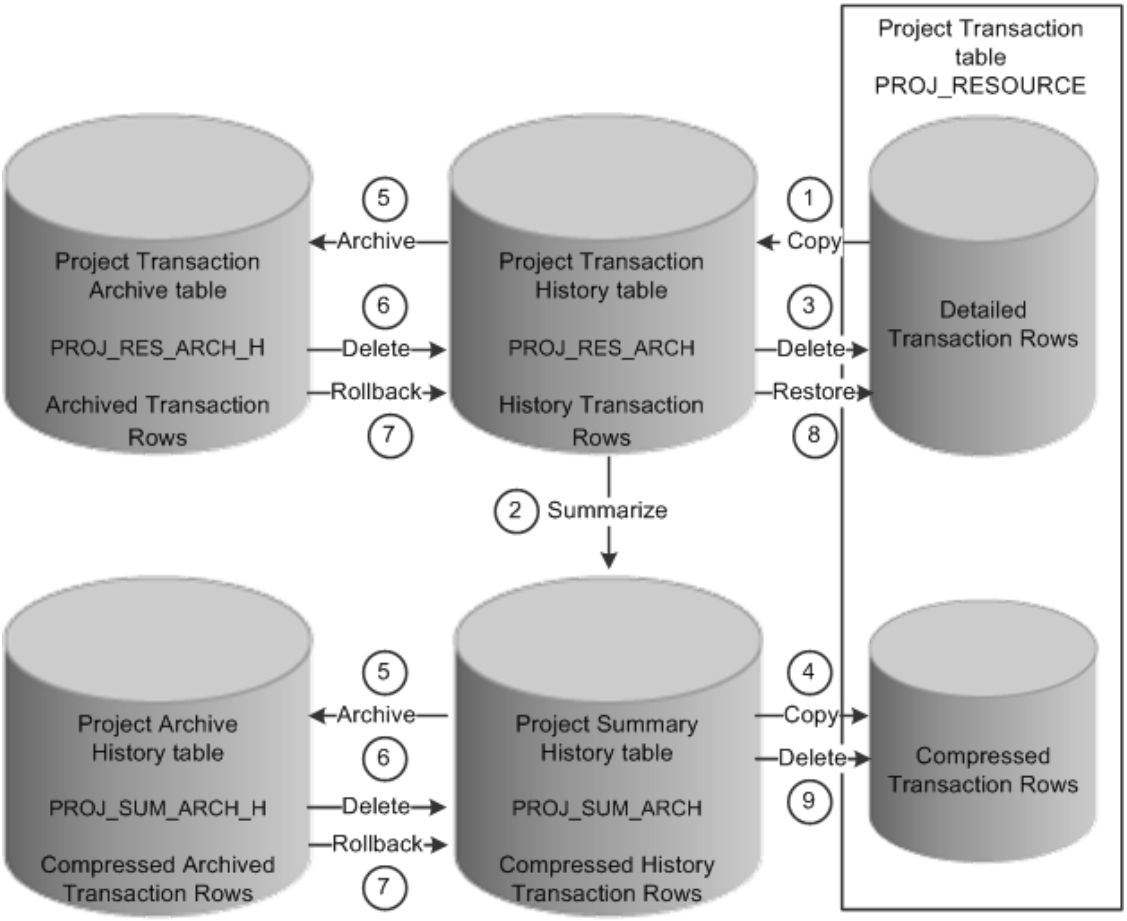
Prerequisite

Before you can archive data, you must run the Project Data Compression process to populate the Project Transaction History table and the Project Summary History table.

Archive Process Flow

This diagram illustrates how the archive process follows the data compression process, which consists of nine steps.



The data compression, archiving, and restoration process flow that the system performs is:

1. Copy the detailed transaction rows based on the compression template and run control options from the Project Transaction table (PROJ_RESOURCE) to the Project Transaction History table (PROJ_RES_ARCH).
2. Summarize detailed transaction rows in the Project Transaction History table and copy them to the Project Summary History table (PROJ_SUM_ARCH).
3. Delete the original transactions from the Project Transaction table.
4. Copy summarized transactions in the Project Summary History table to the Project Transaction table.

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5. Archive or copy rows from the Project Transaction History table to the Project Transaction Archive table, and from the Project Summary History table to the Project Archive History table.
6. Delete archived rows in the Project Transaction History table and in the Project Summary History table.
7. Roll back archived rows from the Project Transaction Archive table to the Project Transaction History table, and from the Project Archive History table to the Project Summary History table.
8. Restore rows from the Project Transaction History table to the Project Transaction table as detailed rows.
9. Delete compressed rows in the Project Transaction table.

You must complete these steps to compress and archive data in PeopleSoft Project Costing:

1. Run the Project Data Compression process to summarize transaction data into history tables.

   You must complete this recurring step before each occurrence of the archive process. The archive process relieves only the Project Transaction History table and Project Summary History table. Archiving data does not affect the Project Transaction table.
2. Select the archive action to initiate the archive jobs that move summarized project data into the archive tables.

   For this recurring step, you select the archive action from the Project Compression Tracking page for the set of compressed data that you want to archive.

   By selecting the archive action, the archive jobs are automatically submitted in the background.
3. (Optional) Roll back data from the archive tables to the history tables to recover deleted data as needed.
4. (Optional) Restore data from the transaction history table to the project transaction table to recover detailed data as needed.
5. (Optional) Purge data from the Project Transaction History table and Project Summary History table.

   You can delete data from the transaction history and summary tables without archiving the data by selecting the purge option from the Project Compression Tracking page. You should only select this option if you no longer need to retain historical transaction data. Consider carefully before you select this option.
6. (Optional) Audit archive jobs.

   The Data Archive Manager retains information about each process that is executed, such as who ran the process, when they ran it, which archive ID and record were affected, and what SQL statement was executed.

Summarizing and Viewing Transaction Row Data

Pages Used to Summarize and View Transaction Row Data

Page Name	Definition Name	Usage
Project Compression Template Page	PC_COMPRESS_TPL	Set up the project compression template.

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Page Name	Definition Name	Usage
Compress Project Data Page	PC_COMPRESS	Summarize project data.
Transaction Detail History	PROJ_RES_ARCHIVE	View the original, uncompressed transaction rows after running the Project Data Compression process. After you run the Project Data Compression process, access this page to view detailed data from the original (not summarized) Project Transaction table that is stored in the Project Transaction History table **Project Costing**, and then **Utilities**, and then **Compressed Transaction Detail**
Transaction Summary History	PROJ_SUM_ARCHIVE	View compressed data that results from the Project Data Compression process. **Project Costing**, and then **Utilities**, and then **Compressed Transaction Summary**

Understanding the Compress Project Data (PC_COMPRESS) Process

The Compress Project Data (PC_COMPRESS) process compresses project transactions based on parameters from the run control. This process:

1. Selects the transactions that are targeted for compression and saves them in history tables.
2. Creates summary transactions and inserts them into the project transactions table.
3. Deletes the original transactions from the project transaction table.

After summarizing transaction data, drill-to-source capabilities are no longer available unless you edited the Project Summary History table to retain integration details.

> **Note**
>
> Do not summarize detailed transaction data that is required by downstream processes. For example, if you create accounting entries using the Process Project Accounting Application Engine process (PSA_ACCTGGL), then always send detailed transactions to the general ledger before you summarize transaction data.

Project Compression Template Page

Use the Project Compression Template page (PC_COMPRESS_TPL) to set up the project compression template.

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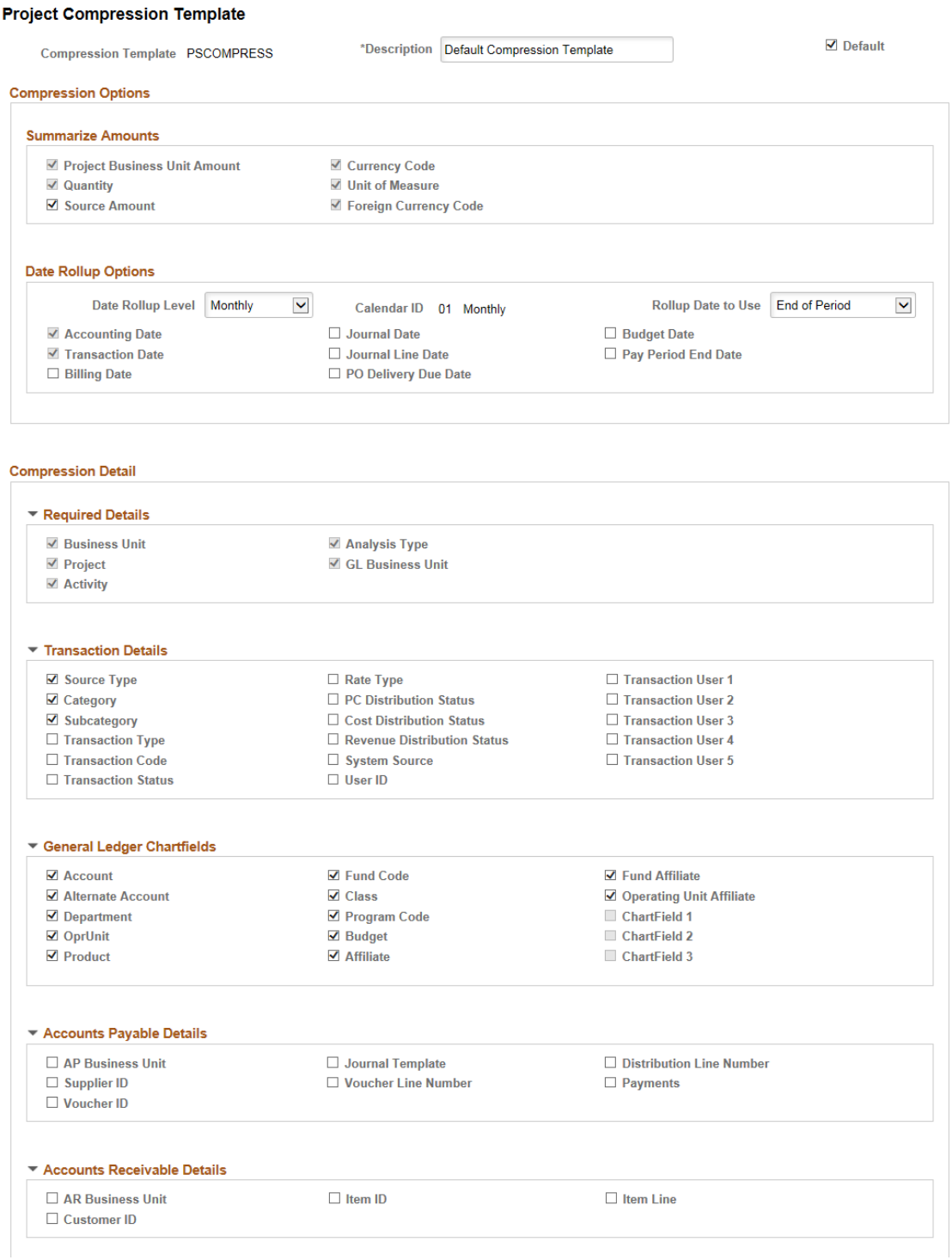
Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Compression Templates**

This example illustrates the fields and controls on the Project Compression Template page (1 of 2). You can find definitions for the fields and controls later on this page.



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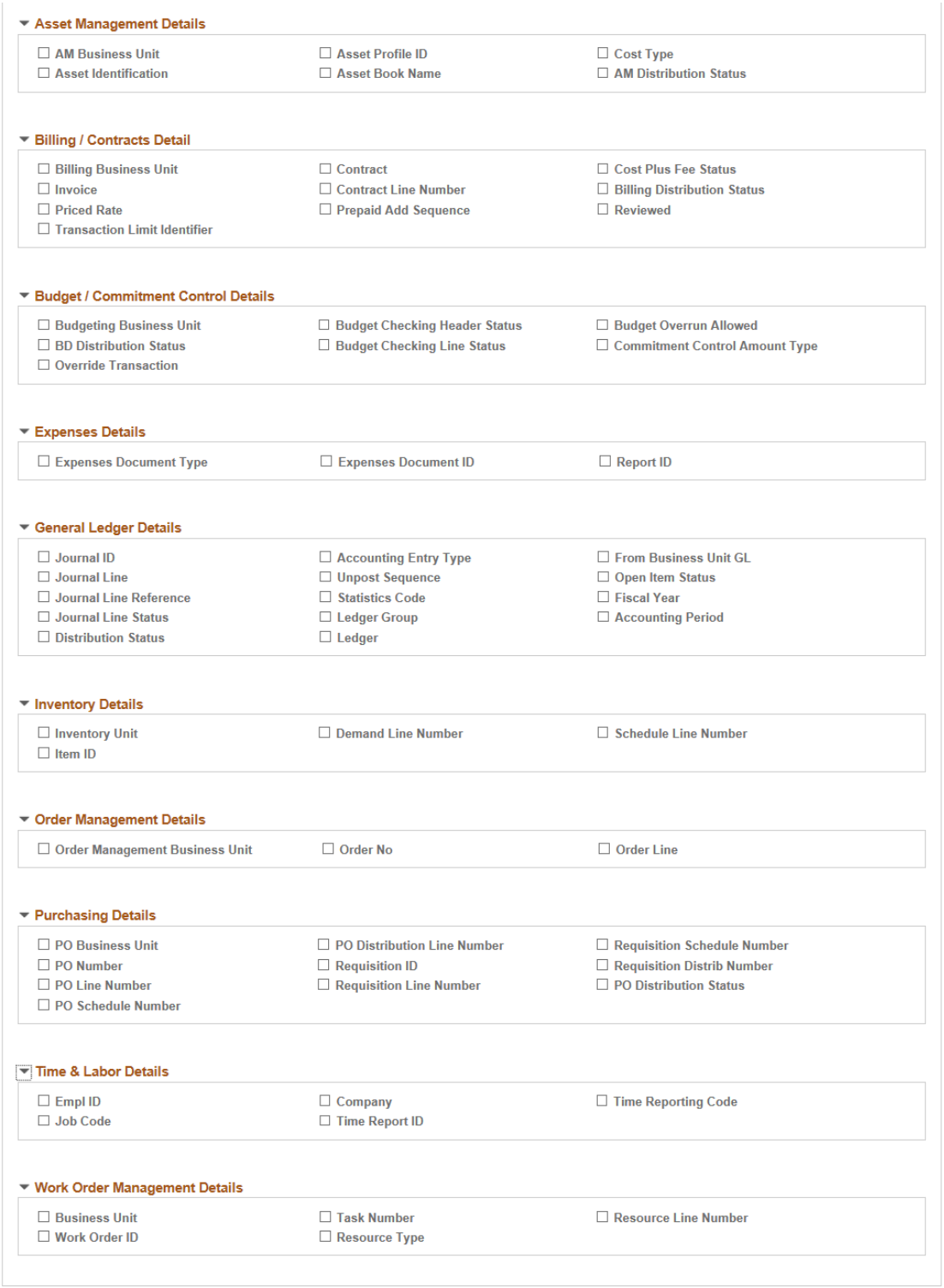
This example illustrates the fields and controls on the Project Compression Template page (2 of 2). You can find definitions for the fields and controls later on this page.



The project compression template defines how project transactions are to be summarized during the Compress Project Data (PC_COMPRESS) process. The Project Compression Template page enables you to set up templates that specify the level of detail retained on the summary rows, the amount to summarize, and the date rollup option. The project compression

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template should be created before running the Compress Project Data (PC_COMPRESS) process.

Field or Control	Description
Default	Select to indicate the particular project compression template as the default template in the Projects WorkCenter page.

Summarize Amounts

Field or Control	Description
Compression Template ID	Enter a unique identifier for the compression template. This ID is used on the Compress Project Data page when creating the run control ID for the Compress Project Data (PC_COMPRESS) process.
Project Business Unit Amount and **Currency Code**	Displays as selected. The project business unit transaction amount is always summarized by the project business unit base currency code. Therefore, this field is always selected.
Quantity and **Unit of Measure**	Displays as selected. The quantity is always summarized by unit of measure. Therefore, this field is always selected.
Source Amount and **Foreign Currency**	Select to optionally select **Foreign Currency.** Optionally, the source amount (foreign currency) may be summarized by the foreign currency code. If **Source Amount** is selected to be summarized, then the **Foreign Currency** field is automatically selected as well. If **Source Amount** is not selected, then the source amount in the resulting summary rows is set to zero.

Date Rollup Options

Field or Control	Description
Date Rollup Level	Select from these options: *Weekly, Monthly, Quarterly,* or *Yearly.* This field determines the dates on the summary rows.
Calendar ID	Displays the corresponding rollup calendar that is used for the date rollup logic. This field is dependant on the option selected in the **Date Rollup Level** field and comes from the Project Costing Installation Options page.
Rollup Date to Use	Select: *Start of Period* or *End of Period.* This field determines whether the start of period date or the end of period date is used in the summary rows.
Accounting Date, Transaction Date. Billing Date, Journal Date, Journal Line Date, PO Delivery Due Date, Budget Date, and **Pay Period End Date**	Select the dates to roll up for transaction rows. The date rollup logic is applied only to the dates that are selected. Dates that are not selected are set to *NULL* on the summary rows. The **Accounting Date** and **Transaction Date** fields are always selected.

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Compression Detail

Select the fields that you want to retain for the summary rows. The fields are grouped into logical sections that are collapsible and expandable.

The Required Details section includes all the fields that must be retained. Each check box in this section is selected and not editable.

The more fields that you select, the more summary rows the system retains, reducing the effectiveness of the compression. Microsoft and Sybase database platforms have a maximum of 32 number fields that can be selected. The **Project Business Unit Amount, Quantity,** and **Source Amount** fields are not included in the maximum.

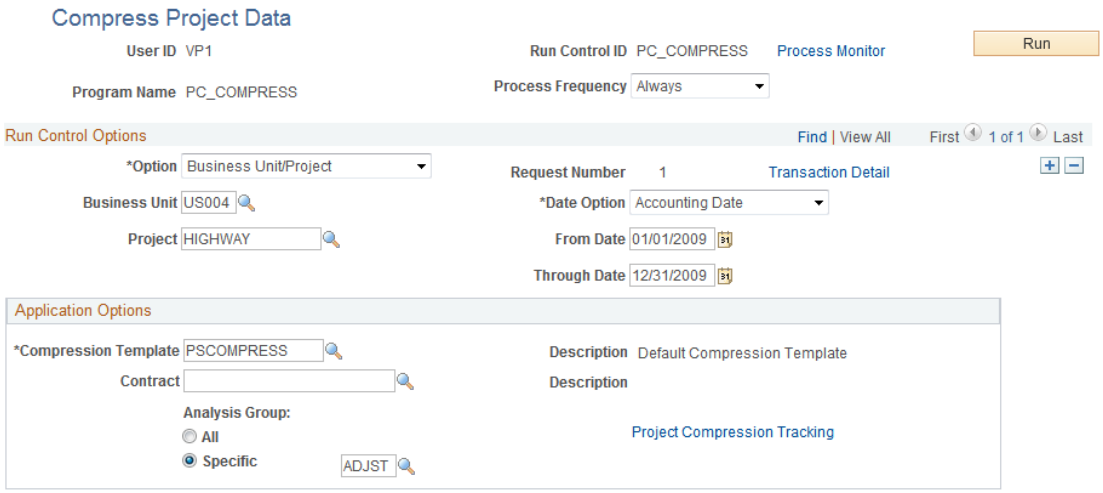
Compress Project Data Page

Use the Compress Project Data page (PC_COMPRESS) to summarize project data.

Navigation:

Project Costing, and then **Utilities**, and then **Compress Project Data**, and then **Compress Project Data**

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



Field or Control	Description
Option	Select the parameters for the Project Data Compression process. Options are: *Business Unit:* The process runs for a selected business unit. *Business Unit/Project:* The process runs for a selected business unit and project. *Business Unit/Project/Activity:* The process runs for a selected business unit, project, and activity.

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Field or Control	Description
Date Option	Select *Accounting Date* or *Transaction Date* to specify the transactions to compress based on a time period.
From Date and **Through Date**	Enter the time period **From Date** and **Through Date** of the transactions to compress.
Transaction Detail	Click to access the Transaction List search page to find and view resource transactions belonging to a project activity.
Compression Template	Select a compression template. The compression template is defined using the Project Compression Template page.
Contract	Select a contract number. This field appears only if PeopleSoft Contracts is licensed. This option enables you to filter the transaction rows by contract.
Analysis Group	Select *All* or *Specific*. This option enables you to filter the transaction rows by analysis group that contains only those analysis types to be included in the compression.
Project Compression Tracking	Click to access the Compression Log page.

See the product documentation for *PeopleTools: Process Scheduler*

Setting Up Feeder and Pricing Summarization

Pages Used to Set up and Use Feeder and Pricing Summarization

Page Name	Definition Name	Usage
Application Fundamentals: Installation Options - Project Costing Integration Page.	INSTALLATION_PCINT	Select the product and pricing options. Determine summarization options in the Summarization Options group box.
Summarization Template Page.	PC_SUM_TEMPLATE	Define summarization templates, which are rules for feeder integration applications and the Project Costing Pricing process.
Transaction List Page.	PROJECT_EXPRESS	View transaction information and drill to the transaction detail.

Steps to Setting Up and Using Feeder and Pricing Summarization

To set up and use feeder and pricing summarization:

1. Select the desired product and pricing options in the Summarization Options group box on the Project Costing Integration page.
2. Define summarization templates using the Summarization Template page.

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3. Run the integration processes from feeder applications.
4. Run the Pricing process to price transactions in the PROJ_RESOURCE table if the Pricing process is not automatically called from the feeder interface process.
5. Drill to the transaction detail from the Transaction List page.

Viewing and Managing Compressed Data

Pages Used to View and Manage Compressed Data

Page Name	Definition Name	Usage
Project Compression Tracking Page	PC_COMPRESS_LOG	View the details of the Compress Project Data process.

Understanding How To View and Manage Compressed Data

The Project Compression Log page serves two purposes:

- It is a log of every compression run that displays the run date and run parameters used.
- It allows the user to perform actions on the compressed data, such as: archiving, purging, restoring, and rolling back compressed data.

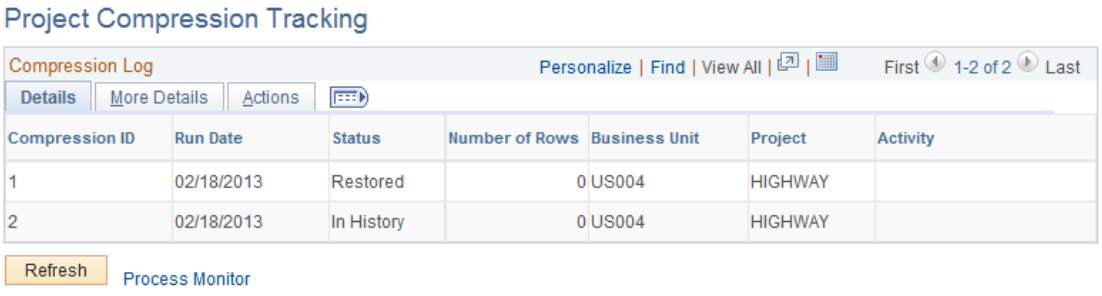
Project Compression Tracking Page

Use the Project Compression Tracking page (PC_COMPRESS_LOG) to view the details of the Compress Project Data process.

Navigation:

Project Costing, and then **Utilities**, and then **Compress Project Data**. Click the **Project Compression Tracking** link.

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



Project Compression Tracking: Details tab

Use this page to view process details.

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Field or Control	Description
Compress ID	Displays the system-generated compression ID.
Run Date	Displays the date and time at which the compression run took place.
Status	Displays the current status of the data from a compression run or an action. Valid values are: • *Archived:* The data that was compressed has been removed from history and is located in the archive tables. • *In History:* The data that was compressed is located in the history tables. • *Purged:* The data that was compressed has been deleted from the history tables. • *Restored:* The data that was compressed has been restored to the project transaction table.

Project Compression Tracking: More Details tab

This page displays additional details from the compression run, such as analysis group and contract ID, if specified. In addition, users can view the SQL used if the Compress Project Data process used customized SQL text.

Field or Control	Description
View SQL	Click this icon to access the Project Compression Tracking - Custom SQL (PC_CMPRESS_LOG_SEC) page. This page displays the customized *where* clause for the compression ID. **Note:** This icon is only available if a customized SQL was used on the Compress Project Data run control page.

Project Compression Tracking: Actions tab

Field or Control	Description
View History	Click an active link to access the Transaction Detail History page for the compressed row. This link is active when the status is *In History,* and it opens a new window when activated.

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Field or Control	Description
Action	Select an action that can be performed on the compressed data. If the status is *Purged* or *Restored,* then no options are available. If the status is *In History* or *Archived,* then these options are available: • *Archive:* Available when the status is *In History.* When selecting this action, the PSARCHIVE process moves rows from the history tables (PROJ_RES_ARCH and PROJ_SUM_ARCH) to the archive tables (PROJ_RES_ARCH_H and PROJ_SUM_ARCH_H). The compression status is updated to *Archived.* **Note:** The **View History** link is not available after this action is performed, and no pages are delivered to view archived data. • *Purge:* Available when the status is *In History.* When selecting this action, the system deletes all rows from the history detail (PROJ_RES_ARCH) and the history summary (PROJ_SUM_ARCH) tables for the selected compression ID. The compression status is updated to *Purged.* The summarized data is still available in the PROJ_RESOURCE table. **Note:** The **View History** link is not available after this action is performed. • *Restore:* Available when the status is *In History.* **Note:** The **View History** link is not available after this action is performed. When selecting this action, the compression process is reversed. The Restore (PC_RESTORE) process performs these tasks: – Deletes summary rows from the project transaction (PROJ_RESOURCE) table. – Moves the detail rows from the history (PROJ_RES_ARCH) tables and inserts them into the project transaction (PROJ_RESOURCE) table. – Deletes the detail and summary rows from the history (PROJ_RES_ARCH and PROJ_SUM_ARCH) tables. – Updates the compression status to *Restored.* • *Rollback:* Available when the status is *Archived.* When selecting this action, the archive process is reversed. The PSARCHIVE application engine moves rows from the archive (PROJ_RES_ARCH_H and PROJ_SUM_ARCH_H) tables to the history

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Field or Control	Description
	(PROJ_RES_ARCH and PROJ_SUM_ARCH) tables. The compression status is updated to *In History*. **Note:** The **View History** link is available after this action is performed.
Process	Click to initiate the selection in the **Action** field.

Refreshing Reporting Tables for PeopleSoft Fluid

Page Used to Refresh Reporting Tables for PeopleSoft Fluid

Page Name	Definition Name	Usage
Refresh Reporting Tables Page	PC_SUM_PR	Use this page to run the process that summarizes project resources.

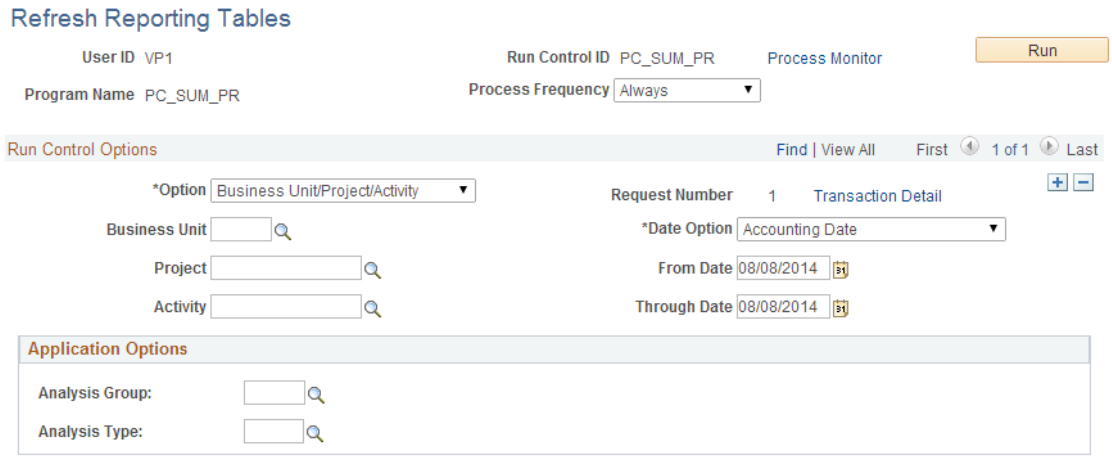
Refresh Reporting Tables Page

Use the Refresh Reporting Tables page (PC_SUM_PR) to run the process that summarizes project resources.

Navigation:

Project Costing, and then **Utilities**, and then **Refresh Reporting Tables**

This example illustrates the fields and controls on the Refresh Reporting Tables page.



Use this page to populate the PROJ_RES_SUM table, which is used by PeopleSoft Fluid pages. This process also synchronizes the PROJ_RES_SUM table with the PROJ_RESOURCE table. If you have selected the Project Transactions Reporting option on the Application Fundamentals: Installation Options - Project Costing Integration Page, then this process runs with the Refresh Summary Tables (PC_SUM_RFSH) process.

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Under normal circumstances, this process only needs to be run during the initial installation, when analysis groups are changed, or if PROJ_RES_SUM is not synchronized with PROJ_RESOURCE.

> **Note**
>
> The run control parameters that you enter on this page do not impact this process when other integration application processes are run, such as PC_AP_TO_PC, PC_EX_TO_PC, and so on. When these integration application processes are run, the PROJ_RES_SUM table is updated with all transactions.

Field or Control	Description
Option	Select one of these options, which controls additional fields: • All • Business Unit • Business Unit/Project • Business Unit/Project/Activity
Transaction Detail	Click this link to access the Transaction List Page where you can view the transactions that will be selected when the process is run.
Date Option	Select one of these options, which controls additional date fields: • Accounting Date • All • Transaction Date
Analysis Group	Select an analysis group to indicate that you want to run this process for transactions that have only the selected analysis group. When you select a value in this field, the Analysis Type field is not available.
Analysis Type	Select an analysis type to indicate that you want to run this process for transactions that have only the selected analysis type. When you select a value in this field, the Analysis Group field is not available.

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Integrating with Third-Party Applications

Understanding Third-Party Data Integration

> **Note**
>
> This topic discusses integrations dealing with third-party applications other than Microsoft Project. For integrating with Microsoft Project, see the Understanding Integration of PeopleSoft Project Costing with Microsoft Project topic.

To integrate third-party data with PeopleSoft Project Costing:

1. Export the information from the third-party system to a database table or a flat file.
2. Import that information into the PeopleSoft Project Costing interface tables.

   How you accomplish this depends on the third-party application.

This topic discusses:

- Third-party data importation into interface tables.
- Third-party tree loading.
- Third-party loader services.

Third-Party Data Importation into Interface Tables

To import third-party data into PeopleSoft Project Costing interface tables:

1. Map fields from the third-party application to fields in the appropriate PeopleSoft Project Costing interface table based on this list:

Interface	Table Name
Projects	Projects Interface staging table (INTFC_PROJ_GEN)
Activities	Activities Interface staging table (INTFC_ACT_GEN)
Resources	Project and Activity Team Interface staging table (INTFC_TEAM_GEN)
Transactions	Project Transaction Interface staging table (INTFC_PROJ_RES)

2. Review and edit data by using the appropriate interface page based on this list:

Data to Review and Edit	Page
Project and project tree information	Review Project Details page

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Data to Review and Edit	Page
Activity information	Review Activity Details page
Resource information	Review Resource Details page
Transaction information	Review Transaction Details page

See Reviewing and Modifying Interface Table Data and Pages Used to Review and Modify Interface Table Data.

3. Run processes to load data from the interface tables into PeopleSoft Project Costing tables.

   Use process options to create, update, or append a project tree.

   If you set up the appropriate exchange rates, the system converts transaction amounts that differ from the business unit currency during the transaction loading process.

Third-Party Tree Loading

The Load Projects and Activities process invokes the Projects Tree Integration Application Engine process (PC_TREE_LOAD). Use the Projects Tree Integration process to:

- Create or update a project tree by using the PROJECT_BU structure ID.
- Append a project to a tree node.

This diagram shows the table and the steps for loading the tree during the Load Projects and Activities process:

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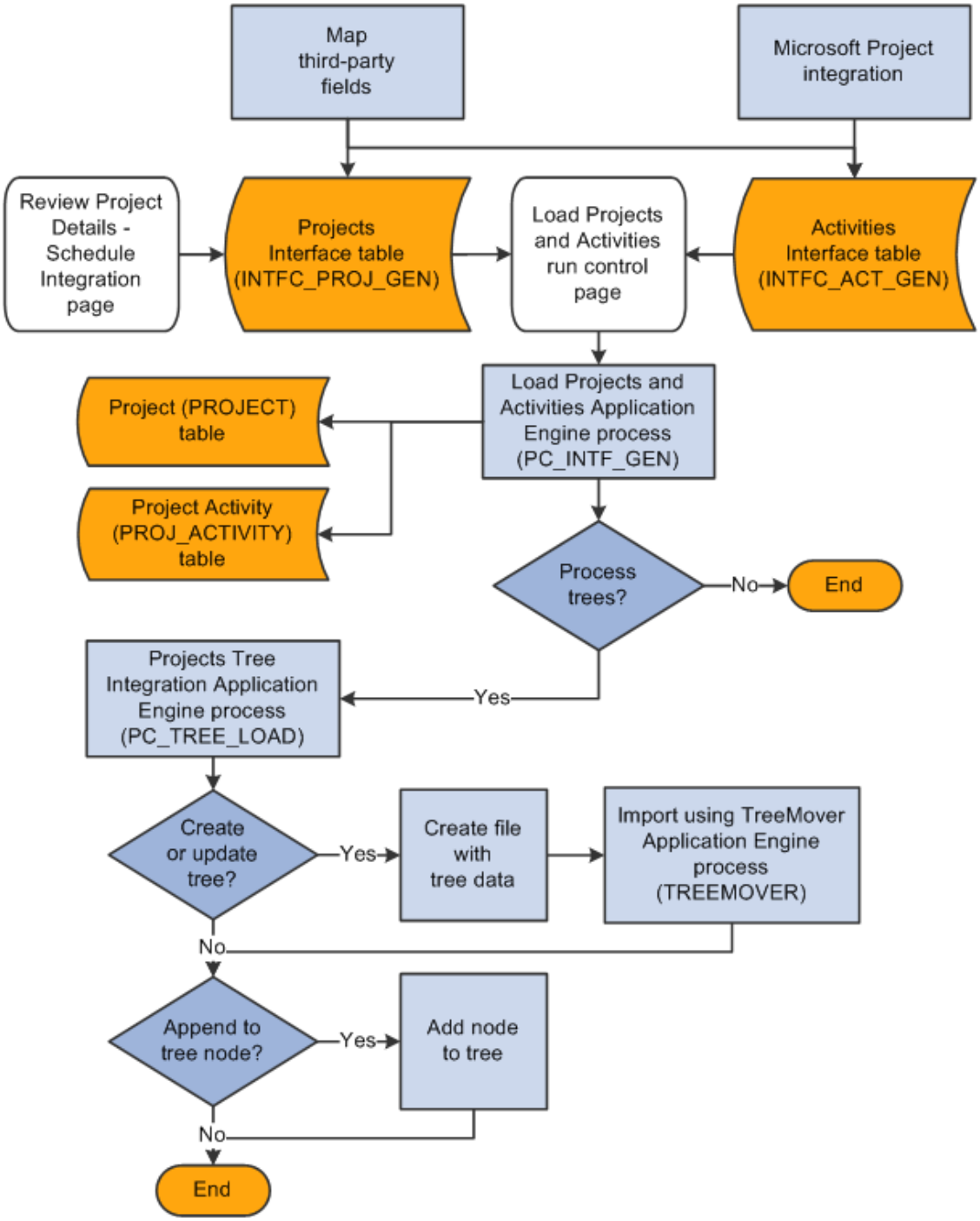

Third-Party Loader Services

PeopleSoft Project Costing provides web services to which any third-party application can subscribe and send projects, activities, and transactions data to Project Costing interface tables.

See See the product documentation for *PeopleTools: Integration Broker*.

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Prerequisites

To integrate project, activity, or transaction-level information from a third-party application into PeopleSoft Project Costing, the third-party application must:

- Add the web service to the appropriate permission lists (one-time step).
- Provide the web service to the WSDL repository (one-time step).
- Consume the web service using whatever method is appropriate for the third party.
- Invoke the create operation on the web service to populate the PeopleSoft Project Costing interface tables.

See See the product documentation for *PeopleTools: Security Administration*, and *PeopleTools: Integration Broker*.

PeopleSoft Project Costing Web Services

This table lists three component interfaces that are published as web services in PeopleSoft Project Costing:

Service Alias	Component Interface Name	Web Service Name	Operation Name	Operation Alias
pcProjectInterface	PROJECT_INTFC_PROJ	CI_PROJECT_INTFC_PROJ	CI_PROJECT_INTFC_PROJ_C	pcProjectCreate
pcActivityInterface	PROJECT_INTFC_ACT	CI_PROJECT_INTFC_ACT	CI_PROJECT_INTFC_ACT_C	pcActivityCreate
pcTransactionInterface	PROJECT_STG_RESOURCES	CI_PROJECT_STG_RESOURCES	CI_PROJECT_STG_RESOURCES _C	pcTransactionCreate

> **Note**
>
> Do not change the component interfaces that are delivered with the PeopleSoft Project Costing system.

After the third-party loader service populates the Projects Interface staging table and Activities Interface staging table, run the Load Projects and Activities process from the Load Projects and Activities run control page to validate and move the data to the appropriate project and activity tables.

After the third-party loader service populates the Project Transaction Interface staging table, run the Load Third-Party Transactions Application Engine process from the Load Transactions run control page to validate and move the data to the appropriate transaction tables.

Understanding PeopleSoft Project Costing Interface Data Structures

This topic discusses:

- Interface table key database fields.
- Projects Interface staging table structure.

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- Activities Interface staging table structure.
- Resources Interface staging table structure.
- Transactions Interface table structure.

Interface Table Key Database Fields

The Projects Interface, Activities Interface, Resources Interface, and Transactions Interface tables use these key database fields, which must be populated for each row of data:

Term	Definition
Interface Identifier field (INTFC_ID)	Identifies a batch of transactions that you send to the interface table. The value increases by one every time that a batch populates the table. You can specify a range of interface identifiers to process multiple batches on the run control page.
Interface Line Number field (INTFC_LINE_NUM)	Uniquely identifies every line that belongs to a batch with the same interface ID.

Additional key database fields in the Projects Interface staging table are Business Unit (BUSINESS_UNIT) and Project (PROJECT_ID). Additional key database fields in the Activities Interface staging table are Business Unit, Project, and Activity (ACTIVITY_ID). Additional key database fields in the Resources Interface staging table are Business Unit, Project, Activity, Team Classification (TEAM_MEMBER_CLASS), Team Identifier (TEAM_MEMBER_IND), and Team Member (TEAM_MEMBER).

Projects Interface Staging Table Structure

This table lists the details of the Projects Interface staging table structure:

Field Number	Field Name	Type	Criteria	Description
1	INTFC_ID	Number	Required	Batch interface identifier.
2	INTFC_LINE_NUM	Number	Required	Unique batch line identifier.
3	BUSINESS_UNIT	Character	Required	Prompts from the SP_BU_PC_NONVW table.
4	PROJECT_ID	Character	Required	Unique project identifier.
5	INTFC_TYPE	Character	Optional	Not used in the PeopleSoft Project Costing interface.
6	SYSTEM_SOURCE	Character	Optional	Populated in the Application Engine with *BPC* (batch processed) if not provided in the source file.
7	APPROVAL_SW	Character	Optional	Not used in the PeopleSoft Project Costing interface.

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Field Number	Field Name	Type	Criteria	Description
8	INTFC_STATUS	Character	Optional	Populated in the Application Engine with *NEW* if not provided in the source file.
9	LOAD_STATUS	Character	Optional	Populated in the Application Engine with *NEW* if not provided in the source file.
10	ORIG_INTFC_ID	Number	Optional	Not used in the PeopleSoft Project Costing interface.
11	ORIG_LINE_NUM	Number	Optional	Not used in the PeopleSoft Project Costing interface.
12	INTEGRATION_TMPL	Character	Required	Must be a value from the Integration Template table (PC_INT_TMPL). Default value is INTEGRATION_TMPL.OPR_DEF_TBL_PC if not provided in the source file.
13	DESCR	Character	Required	Project description up to 30 characters.
14	PROJECT_TYPE	Character	Optional	Prompts from the PROJ_TYPE_TBL table. **Note:** The default value of the rate set or rate plan is based on the project type if you associate a predefined rate set or rate plan with the project type and include the project type in the source file.
15	BUSINESS_UNIT_AM	Character	Optional	Not used in the PeopleSoft Project Costing interface.
16	ASSET_ID	Character	Optional	Not used in the PeopleSoft Project Costing interface.
17	PROFILE_ID	Character	Optional	Not used in the PeopleSoft Project Costing interface.

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Field Number	Field Name	Type	Criteria	Description
18	GROUP_ASSET_ID	Character	Optional	Not used in the PeopleSoft Project Costing interface.
19	PARENT_ID	Character	Optional	Not used in the PeopleSoft Project Costing interface.
20	AM_DISTRIB_STATUS	Character	Optional	Not used in the PeopleSoft Project Costing interface.
21	QUANTITY	Sign	Optional	Not used in the PeopleSoft Project Costing interface.
22	TAG_NUMBER	Character	Optional	Not used in the PeopleSoft Project Costing interface.
23	TRANS_CODE	Character	Optional	Not used in the PeopleSoft Project Costing interface.
24	TEMPLATE_ID	Character	Conditional	Not used in the PeopleSoft Project Costing interface.
25	TEMPLATE_SW	Character	Conditional	Not used in the PeopleSoft Project Costing interface.
26	AFUDC_PROJ_SW	Character	Conditional	Not used in the PeopleSoft Project Costing interface.
27	TARGET_PROJ_SW	Character	Optional	Not used in the PeopleSoft Project Costing interface.
28	SALES_TAX_PROJ_SW	Character	Optional	Not used in the PeopleSoft Project Costing interface.
29	DOCKET_NUMBER	Character	Optional	Not used in the PeopleSoft Project Costing interface.
30	PROJECT_FUNCTION	Character	Optional	Not used in the PeopleSoft Project Costing interface.
31	DTTM_STAMP	Date/Time	System-maintained	The date and time when the project is created.
32	OPRID	Character	Optional	The interface assigns an operator ID.
33	PROCESS_INSTANCE	Number	System-maintained	The interface assigns a process instance number.
34	DESCR254	Character	Optional	Project description up to 254 characters.

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Field Number	Field Name	Type	Criteria	Description
35	ADDRESS_ID	Character	Optional	Not used in the PeopleSoft Project Costing interface.
36	LOCATION_EFFDT	Date	Optional	Effective date of the project location. Populated with %Date (current server date) if not provided in the source file.
37	EFFSEQ	Number	Optional	Project location effective sequence or project status effective sequence. Default value is *1*.
38	LOCATION	Character	Optional	Must be a value from the LOCATION_TBL table.
39	LOCATION_FRACTION	Number	Optional	Not used in the PeopleSoft Project Costing interface.
40	CUST_ID	Character	Optional	Not used in the PeopleSoft Project Costing interface.
41	PS_OWNER	Character	Optional	Not used in the PeopleSoft Project Costing interface.
42	FLEX_FORMULA	Character	Optional	Not used in the PeopleSoft Project Costing interface.
43	TEAM_MEMBER	Character	Optional	(Not used in the PeopleSoft Project Costing interface.)
44	PROJ_ROLE	Character	Optional	Project manager's project role. Prompts from the Project Role table (PROJ_ROLE).
45	EMAILID	Character	Optional	Project team member's email ID.

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Field Number	Field Name	Type	Criteria	Description
46	MANAGER_EFFDT	Date	Optional	MANAGER_EFFDT and MANAGER_START_DT must have the same date and must both be between the project start and end dates; otherwise, an error message appears. MANAGER_EFFDT, if left blank, is populated with the current date.
47	PROJECT_MANAGER	Character	Optional	If PROJECT_MANAGER is populated, PROJ_ROLE, MANAGER_START_DT, and MANAGER_END_DT are required to save the page; otherwise, an error message appears.
48	ROLE_TYPE	Character	Optional	Project team member's role type. If PROJECT_MANAGER is populated, this field is required to save the page.
49	MANAGER_START_DT	Date	Date	MANAGER_EFFDT and MANAGER_START_DT must have the same date and must both be between the project start and end dates; otherwise, an error message appears.
50	MANAGER_END_DT	Date	Date	If PROJECT_MANAGER is populated, this field is required to save the page.

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Field Number	Field Name	Type	Criteria	Description
51	STATUS_EFFDT	Date	Optional	Project's status effective date. Populated with %Date (current server date) if not provided in the source file.
52	PROJECT_STATUS	Character	Optional	Must be a value from the PROJ_STATUS_TBL table If a project status is provided in the source file, it must be previously defined against a processing status in the PROJ_STATUS_TBL table. If a project status is not provided, the default is based on the PC_STAT_DEFAULT table.
53	START_DT_2	Date	Optional	User-defined field.
54	END_DT_2	Date	Optional	User-defined field.
55	START_DT	Date	Optional	Project team member's start date.
56	END_DT	Date	Optional	Project team member's end date.
57	PROJECT_PRIORITY	Number	Optional	Project status priority.
58	PERCENT_COMPLETE	Number	Optional	Percent project is completed.
59	INTEREST_FACTOR	Sign	Optional	Interest calculation factor.
60	MILESTONE_EFFDT	Date	Optional	Not used in the PeopleSoft Project Costing interface.
61	MILESTONE_TYPE	Character	Optional	Not used in the PeopleSoft Project Costing interface.
62	MILESTONE_CODE	Character	Optional	Not used in the PeopleSoft Project Costing interface.
63	MILESTONE_ORIGIN	Character	Optional	Not used in the PeopleSoft Project Costing interface.

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Field Number	Field Name	Type	Criteria	Description
64	TRANS_DT	Date	Optional	Not used in the PeopleSoft Project Costing interface.
65	ACCOUNTING_DT	Date	Optional	Not used in the PeopleSoft Project Costing interface.
66	SCHEDULE_TYPE	Character	Optional	Prompts from the PROJ_PHASE_TBL table.
67	SCHEDULE_STATUS	Character	Optional	Populate the field with *A* (actual schedule) or *E* (estimated schedule). The default value is *A*.
68	SCHEDULE_DESCR	Character	Optional	Project phase description up to 30 characters.
69	FROM_DT	Date	Optional	Project phase begin date.
70	TO_DT	Date	Optional	Project phase end date.
71	DOCUMENT_TYPE	Character	Optional	Not used in the PeopleSoft Project Costing interface.
72	DOCUMENT_NAME	Character	Optional	Not used in the PeopleSoft Project Costing interface.
73	DOCUMENT_PATH	Character	Optional	Not used in the PeopleSoft Project Costing interface.
74	PROJECT_USER1	Character	Optional	User-defined field.
75	PROJECT_USER2	Character	Optional	User-defined field.
76	PROJECT_USER3	Character	Optional	User-defined field.
77	PROJECT_USER4	Character	Optional	User-defined field.
78	PROJECT_USER5	Character	Optional	User-defined field.
79	PROJECT_USER_DT6	Date	Optional	User-defined field.
80	PROJECT_USER_DT2	Date	Optional	User-defined field.
81	PC_USER_CURRENCY	Character	Optional	User-defined field. Prompts from the CURRENCY_CD_TBL table.
82	PROJECT_USERAMT1	Sign	Optional	User-defined field.
83	PROJECT_USERAMT2	Sign	Optional	User-defined field.

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Field Number	Field Name	Type	Criteria	Description
84	PROJECT_USERAMT1	Sign	Optional	User-defined field.
85	AN_GRP_ACTV_BUD	Character	Optional	Default value is INSTALLATION_PC.AN_GRP_ACTV_BUD. Prompts from the PROJ_AN_GRP_TBL.
86	AN_GRP_TOT_COSTS	Character	Optional	Default value is INSTALLATION_PC.AN_GRP_TOT_COSTS. Prompts from the PROJ_AN_GRP_TBL table.
87	SET_OVERRIDE	Character	Required under certain circumstances	Populated from the SP_SETID_NONVW table. General ledger uses this SetID for prompting and the Journal Edit process. The field is required if PeopleSoft General Ledger is installed or you use Projects Budgeting.
88	PROJ_TOLERANCE_TYP	Character	Optional	Not used in the PeopleSoft Project Costing interface.
89	PROJ_TOLERANCE_AMT	Number	Optional	Not used in the PeopleSoft Project Costing interface.
90	PROJ_TOLERANCE_PCT	Number	Optional	Not used in the current product release.
91	ADDRESS_SBR	Subrecord	Optional	The interface assigns address information.
1 (ADDRESS_SBR)	COUNTRY	Character	Optional	Country. Prompts from the COUNTRY_TBL table.
2 (ADDRESS_SBR)	ADDRESS1	Character	Optional	Address line 1.
3 (ADDRESS_SBR)	ADDRESS2	Character	Optional	Address line 2.
4 (ADDRESS_SBR)	ADDRESS3	Character	Optional	Address line 3.
5 (ADDRESS_SBR)	ADDRESS4	Character	Optional	Address line 4.
6 (ADDRESS_SBR)	CITY	Character	Optional	City.

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Field Number	Field Name	Type	Criteria	Description
7 (ADDRESS_SBR)	NUM1	Character	Optional	Number 1.
8 (ADDRESS_SBR)	NUM2	Character	Optional	Number 2.
9 (ADDRESS_SBR)	HOUSE_TYPE	Character	Optional	House type. Prompts from the translate values for the HOUSE_TYPE field.
10 (ADDRESS_SBR)	ADDR_FIELD1	Character	Optional	Address field 1. Prompts from the translate values for the ADDR_FIELD1 field.
11 (ADDRESS_SBR)	ADDR_FIELD2	Character	Optional	Address field 2.
12 (ADDRESS_SBR)	ADDR_FIELD3	Character	Optional	Address field 3.
13 (ADDRESS_SBR)	COUNTY	Character	Optional	County.
14 (ADDRESS_SBR)	STATE	Character	Optional	State.
15 (ADDRESS_SBR)	POSTAL	Character	Optional	Postal code.
16 (ADDRESS_SBR)	GEO_CODE	Character	Optional	Tax vendor geographic.
17 (ADDRESS_SBR)	IN_CITY_LIMIT	Character	Optional	Within city limit (yes or no).
92	EARLY_START_DT	Date	Optional	Early start date.
93	EARLY_FINISH_DT	Date	Optional	Early finish date.
94	ACTUAL_START_DT	Date	Optional	Actual start date.
95	ACTUAL_FINISH_DT	Date	Optional	Actual finish date.
96	BASELINE_START_DT	Date	Optional	Baseline start date.
97	BASELINE_FINISH_DT	Date	Optional	Baseline finish date.
98	LATE_START_DT	Date	Optional	Late start date.
99	LATE_FINISH_DT	Date	Optional	Late finish date.

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Field Number	Field Name	Type	Criteria	Description
100	PC_SCH_PRODUCT	Character	Optional	Third-party product code is a text field with no edit. The field is used for informational purposes only and can help reference the source system for the transaction.
101	PC_SCH_FIELD1	Character	Optional	Third-party project ID. If you import from a third-party product, this field is used to store the project ID that is from the third-party product.
102	PC_SCH_FIELD2	Character	Optional	Third-party project description up to 40 characters.
103	PC_SCH_FIELD3	Character	Required for tree integration	If you import from a third-party application, enter the unique node ID from the third-party application. If not, enter the project ID or WBS ID.
104	PC_SCH_FIELD4	Character	Optional	Node ID description.
105	PC_SCH_FIELD5	Character	Required for tree integration	Parent node ID. Only the root node (tree indent level 1) does not have a parent node ID.
106	PC_SCH_FIELD6	Character	Optional	Not used in the PeopleSoft Project Costing interface.
107	PC_SCH_FIELD7	Character	Optional	Not used for tree integration.

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Field Number	Field Name	Type	Criteria	Description
108	PC_SCH_FIELD8	Character	Optional	Can be used for the concatenation of this node to its parent and ancestors upward to the root node. For example, in AUTO.TRAIN.DOCS, AUTO is the root node, TRAIN is its child, and DOCS is its grandchild.
109	DESCRSHORT	Character	Optional	Short description for WBS ID.
110	PC_INDENT_LEVEL	Number	Required for tree integration	The level that is within the tree to which the current node belongs. Level 1 is the root node. There can be only one root node in a tree.
111	SUMMARY_PRJ	Character	Optional	Flag that designates if the project is a summary or a detail project. Default value is *N* (no).
112	ENFORCE	Character	Optional	Identifies the enforce project team option, such as PeopleSoft Expenses only, PeopleSoft Time and Labor only, Expenses and Time and Labor, or do not enforce. Default value is BUS_UNIT_OPT_PC.ENFORCE.
113	ENFORCE_TYPE	Character	Optional	Identifies the enforce project and activity team option, such as project and activity team, project team only, decide at the project level, or do not enforce. Default value is BUS_UNIT_OPT_PC.ENFORCE_TYPE.

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Field Number	Field Name	Type	Criteria	Description
114	PC_PROCESS_STATUS	Character	Optional	Provide a processing status value of *A* (active), *I* (inactive), or *P* (pending). If the source file does not contain a processing status, the default value is based on the Processing Status field on the Project Status Defaults page.
115	PROJ_REQUEST_ID	Character	Optional	Project request ID.
116	PPK_PROJ_VERSION	Character	Optional	Project request version.
117	PGM_SCHED_METHOD	Character	Optional	Schedule method, such as fixed units, duration, and work. Default value is BUS_UNIT_OPT_PC.PGM_SCHED_METHOD.
118	PC_PERCENT_DTTM	Date/Time	Optional	Percent complete date and time.
119	HOLIDAY_LIST_ID	Character	Optional	Holiday calendar. Default value is BUS_UNIT_OPT_PC.HOLIDAY_LIST_ID.
120	PLAN_STARTDT	Date	Optional	Planned start date.
121	PLAN_ENDDT	Date	Optional	Planned end date.
122	PLAN_PROJROLE	Character	Optional	Primary project role. Prompts from Project Role table (PROJ_ROLE).
123	PC_CALCULATE_SW	Character	Optional	Calculate manually, delay calculations until save, or calculate in real time. Default value is BUS_UNIT_OPT_PC.PC_CALCULATE_SW.

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Field Number	Field Name	Type	Criteria	Description
124	CONSTRAINT_DT_FLG	Character	Optional	Indicates that the system should always honor the constraint dates. Default value is *Y* (yes).
125	CHARGING_LEVEL	Character	Optional	The level of WBS activities that are available for charging, such as all detail activities, level 1, level 2, and level 3. Default value is from BUS_UNIT_OPT_PC.CHARGING_LEVEL.
126	CHARGING_LEVEL_TR	Character	Optional	The level of WBS activities that are available for charging on time reports from in PeopleSoft Expenses. Default value is from BUS_UNIT_OPT_PC.CHARGING_LEVEL_TR.
127	RATE_PLAN	Character	Optional	Not used in the PeopleSoft Project Costing interface. **Note:** The default value of the rate plan or rate set is based on the project type of the project or activity if you associate a predefined rate set or rate plan with the project type, and include the project type in the source file.
128	BUDGET_APPROVER	Character	Optional	Prompts from PC_CHC_BUD_APR table.
129	SCEN_ADJUST_PCT_TM	Sign	Optional	Scenario adjustment percent for time.
130	SCEN_ADJUST_PCT_EX	Sign	Optional	Scenario adjustment percent for expenses.

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Field Number	Field Name	Type	Criteria	Description
131	MANAGED_BY_WO	Character	Optional	Indicates if a project is managed by a work order. Default value is *N* (no).
132	PC_REV_BUD_AN_GRP	Character	Optional	Prompts from SP_AN_GRP_NONVW table.
133	AN_GRP_TOT_REV	Character	Optional	Prompts from the SP_AN_GRP_NONVW table.
134	AN_GRP_EAC	Character	Optional	Analysis group that represents the estimate at completion forecast. Prompts from the SP_AN_GRP_NONVW table.
135	RETAIN_HISTORY	Character	Optional	Indicates how often history is retained. The default value is based on the business unit.

Activities Interface Staging Table Structure

This table lists the details of the Activities Interface staging table structure:

Field Number	Field Name	Type	Criteria	Description
1	INTFC_ID	Number	Required	Batch interface identifier.
2	INTFC_LINE_NUM	Number	Required	Unique batch line identifier.
3	BUSINESS_UNIT	Character	Required	Prompts from the SP_BU_PC_NONVW table.

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Field Number	Field Name	Type	Criteria	Description
4	PROJECT_ID	Character	Conditional	You can bulk load projects and use the system autonumbering functionality to generate the next PROJECT_ID. In this case, PROJECT_IDs are not required. However, if you perform update projects or incrementally add activities to projects, then PROJECT_IDs are required and are validated against the PROJECT table.
5	ACTIVITY_ID	Character	Conditional	You can bulk load activities and use the system autonumbering functionality to generate the next ACTIVITY_ID. In this case, ACTIVITY_IDs are not required. However, if you perform updates or incrementally add activities to projects, then ACTIVITY_IDs are required and are validated against the PROJ_ACTIVITY table.
6	INTFC_TYPE	Character	Optional	Not used in the activity interface.
7	INTFC_STATUS	Character	Optional	Populate the field with *NEW*.
8	LOAD_STATUS	Character	Optional	Populate the field with *NEW*.
9	ORIG_INTFC_ID	Number	Optional	Not used in the activity interface.
10	ORIG_LINE_NUM	Number	Optional	Not used in the activity interface.
11	ACTIVITY_DESCR	Character	Optional	Activity description up to 30 characters.

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Field Number	Field Name	Type	Criteria	Description
12	ACTIVITY_TYPE	Character	Optional	Prompts from the PROJ_ACT_TBL table.
13	SYSTEM_SOURCE	Character	Optional	Populate the field with *BPC* (batch process).
14	PERCENT_COMPLETE	Number	Optional	Schedule status percent complete.
15	EARLY_START_DT	Date	Optional	Early start date.
16	LATE_START_DT	Date	Optional	Late start date.
17	ACTUAL_START_DT	Date	Optional	Actual start date.
18	EARLY_FINISH_DT	Date	Optional	Early finish date.
19	LATE_FINISH_DT	Date	Optional	Late finish date.
20	ACTUAL_FINISH_DT	Date	Optional	Actual finish date.
21	BASELINE_FINISH_DT	Date	Optional	Baseline finish date.
22	BASELINE_START_DT	Date	Optional	Baseline start date.
23	BCWP	Number	Optional	Work performed.
24	BCWS	Number	Optional	Work scheduled.
25	ACT_TYPE_SCH	Character	Optional	Schedule activity type. Prompts from the PC_ACT_TYPE_SCH table.
26	DTTM_STAMP	Date/Time	System-maintained	Date and time when the project is created.
27	DRAWING_NAME	Character	Optional	Not used in the activity interface.
28	ACTIVITY_USER1	Character	Optional	User-defined field.
29	ACTIVITY_USER2	Character	Optional	User-defined field.
30	ACTIVITY_USER3	Character	Optional	User-defined field.
31	ACTIVITY_USER4	Character	Optional	User-defined field.
32	ACTIVITY_USER5	Character	Optional	User-defined field.
33	PC_ACT_USER_DT1	Date	Optional	User-defined field.
34	PC_ACT_USER_DT2	Date	Optional	User-defined field.
35	PC_USER_CURRENCY	Character	Optional	User-defined field. Prompts from the CURRENCY_CD_TBL table.
36	PC_ACT_USERAMT1	Sign	Optional	User-defined field.

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Field Number	Field Name	Type	Criteria	Description
37	PC_ACT_USERAMT2	Sign	Optional	User-defined field.
38	PC_ACT_USERAMT3	Sign	Optional	User-defined field.
39	SETID	Character	Required	Not used in the activity interface.
40	OPRID	Character	Optional	The interface assigns an operator ID.
41	PROCESS_INSTANCE	Number	System-maintained	The interface assigns a process instance number.
42	DESCR254	Character	Optional	Activity description up to 254 characters.
43	ACT_LOC_EFFDT	Date	Optional	Activity location effective date. Populated with %Date (current server date) if not provided in the source file.
44	EFFSEQ	Number	Optional	Activity location effective sequence or activity status effective sequence. Default value is *1*.
45	LOCATION	Character	Optional	Must be a value from the LOCATION_TBL table. Default value is from LOCATION_TBL.LOCATION.
46	LOCATION_FRACTION	Number	Optional	Not used in the activity interface.
47	ACTIVITY_STATUS	Character	Optional	Activity status. Prompts from the PROJ_STATUS_TBL table.
48	ACT_STATUS_EFFDT	Date	Optional	Activity status effective date. Populated with %Date (current server date) if not provided in the source file.
49	START_DT_2	Date	Optional	User-defined field.
50	END_DT_2	Date	Optional	User-defined field.
51	START_DT	Date	Required	Activity start date.
52	END_DT	Date	Required	Activity end date.

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Field Number	Field Name	Type	Criteria	Description
53	ACTIVITY_PRIORITY	Number	Optional	Activity priority.
54	ACT_PCT_COMPLETE	Number	Optional	Activity percentage complete.
55	QUALITY_DTTM	Date/Time	System-maintained	Date and time when the record is created.
56	QUALITY_TYPE	Character	Optional	Prompts from the PROJ_QUAL_TBL table.
57	QUALITY_RATING	Number	Optional	Not used in the activity interface.
58	QUALITY_WEIGHT	Number	Optional	Not used in the activity interface.
59	QUALITY_MEMBER	Character	Optional	Prompts from the PROJ_TEAM_VW table.
60	ADDRESS_SBR	Subrecord	Optional	The interface assigns address information.
1 (ADDRESS_SBR)	COUNTRY	Character	Optional	Country. Prompts from the COUNTRY_TBL table.
2 (ADDRESS_SBR)	ADDRESS1	Character	Optional	Address line 1.
3 (ADDRESS_SBR)	ADDRESS2	Character	Optional	Address line 2.
4 (ADDRESS_SBR)	ADDRESS3	Character	Optional	Address line 3.
5 (ADDRESS_SBR)	ADDRESS4	Character	Optional	Address line 4.
6 (ADDRESS_SBR)	CITY	Character	Optional	City.
7 (ADDRESS_SBR)	NUM6	Character	Optional	Number 6.
8 (ADDRESS_SBR)	NUM2	Character	Optional	Number 2.
9 (ADDRESS_SBR)	HOUSE_TYPE	Character	Optional	House type. Prompts from the translate values for the HOUSE_TYPE field.
10 (ADDRESS_SBR)	ADDR_FIELD1	Character	Optional	Address field 1. Prompts from the translate values for the ADDR_FIELD1 field.
11 (ADDRESS_SBR)	ADDR_FIELD2	Character	Optional	Address field 2.
12 (ADDRESS_SBR)	ADDR_FIELD3	Character	Optional	Address field 3.

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Field Number	Field Name	Type	Criteria	Description
13 (ADDRESS_SBR)	COUNTY	Character	Optional	County.
14 (ADDRESS_SBR)	STATE	Character	Optional	State.
15 (ADDRESS_SBR)	POSTAL	Character	Optional	Postal code.
16 (ADDRESS_SBR)	GEO_CODE	Character	Optional	Tax vendor geographic.
17 (ADDRESS_SBR)	IN_CITY_LIMIT	Character	Optional	Within city limit (yes or no).
61	RATE_PLAN	Character	Optional	Not used in the PeopleSoft Project Costing interface. **Note:** The default value of the rate plan or rate set is based on the project type of the project or activity if you associate a predefined rate set or rate plan with the project type, and include the project type in the source file.
62	PC_MILESTONE_FLG	Character	Conditional	Indicates if activity is a milestone.
63	AFUDC_ACT_SW	Character	Conditional	Allows interest calculations for this project activity.
64	ACT_TEMPLATE_SW	Character		Not used in the PeopleSoft Project Costing interface.
65	PC_SCH_FIELD1	Character	Optional	Third-party user field.
66	PC_SCH_FIELD2	Character	Optional	Third-party user field.
67	PC_SCH_FIELD3	Character	Optional	Third-party user field.
68	PC_SCH_FIELD4	Character	Optional	Third-party user field.
69	PC_SCH_FIELD5	Character	Optional	Third-party user field.
70	PC_SCH_FIELD6	Character	Optional	Third-party user field.
71	PC_SCH_FIELD7	Character	Optional	Third-party user field.

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Field Number	Field Name	Type	Criteria	Description
72	SUMMARY_ACT	Character	Optional	Designates an activity as a summary activity. The default value is *N* (no).
73	PC_DURATION	Number		Duration.
74	ENFORCE	Character	Optional	Identifies the enforce project team option, such as PeopleSoft Expenses only, PeopleSoft Time and Labor only, Expenses and Time and Labor, or do not enforce.
75	PC_CHC_ACT_SW	Character	Optional	Enables change control. Default value is PROJECT.PC_CHC_SW.
76	PGM_SCHED_METHOD	Character	Optional	Schedule method, such as fixed units, duration, and work. Default value is PROJECT.PGM_SCHED_METHOD.
77	WBS_ID	Character	Optional	Coded hierarchy identifier for each activity.
78	PGM_WBS_SBR	Subrecord	Optional	Hierarchy grid subrecord.
1 (PGM_WBS_SBR) *through* 26 (PGM_WBS_SBR)	LEVEL1 *through* LEVEL 26	Number	Optional	
79	LEVEL_NUM	Number	Optional	
80	ROW_NUMBER_5	Number	Optional	Internal sequence number assigned to each row to uniquely identify a row.
81	DEADLINE_DT	Date	Optional	Deadline date.
82	CONSTRAINT_DT	Date	Optional	Constraint date.
83	CONSTRAINT_TYPE	Character	Optional	Constraint type.
84	COSTING_ACT_SW	Character	Optional	Activity costing flag. Indicates whether an activity is available for charging.

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Field Number	Field Name	Type	Criteria	Description
85	PC_ACT_OWNER	Character	Optional	Activity owner. Prompts from PC_TEAM_PROM_VW table.
86	CURRENCY_CD	Character	Optional	Default value is PROJECT.CURRENCY_CD.
87	PC_ACT_DEF_CALC_MT	Character	Optional	Activity calculation method. Default value is PROJECT.PC_ACT_DEF_CALC_MT.

Resources Interface Table Structure

This table lists the details of the Resources Interface staging table structure:

Field Number	Field Name	Type	Criteria	Description
1	INTFC_ID	Number	Required	Batch interface identifier.
2	INTFC_LINE_NUM	Number	Required	Unique batch line identifier.
3	BUSINESS_UNIT	Character	Required	Prompts from the SP_BU_PC_NONVW table.
4	PROJECT_ID	Character	Required	Unique project identifier
5	ACTIVITY_ID	Character	Optional	Required if loading activity team member. Otherwise, leave blank for project team member.
6	TEAM_MEMBER_CLASS	Character	Required	“L” for labor, “M” for material, “A” for equipment asset.
7	TEAM_MEMBER_IND	Character	Required	For named resources, use “E”. For generic resources, use “G” if labor resource, else use “N” for material or equipment asset generic resource.

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Field Number	Field Name	Type	Criteria	Description
8	TEAM_MEMBER	Character	Required	For named resources, this is the unique valid resource ID. For generic resources, this is a generic text field.
9	PLAN_STARTDT	Character	Optional	Required if adding project team member. Indicates the planned start date the resource is assigned to the project.
10	PLAN_ENDDT	Character	Optional	Required if adding project team member. Indicates the planned end date the resource is assigned to the project.
11	PROJ_ROLE	Character	Optional	Required for labor resource. Prompts from the PROJ_ROLE table.
12	BUSINESS_UNIT_AM	Character	Optional	Required for equipment asset resource. The Asset Management business unit associated with the resource.
13	ASSET_TYPE	Character	Optional	Required for equipment asset resource. The type of asset.
14	ASSET_SUBTYPE	Character	Optional	Required for equipment asset resource. Prompts from the AM_SUBTYPE table.
15	MODEL	Character	Optional	Optional for equipment asset resource. Prompts from the MFG_MODEL equipment asset.

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Field Number	Field Name	Type	Criteria	Description
16	MFG_ID	Character	Optional	Optional for equipment asset resource. Prompts from the MANUFACTURER table.
17	AVAIL_UNITS	Number	Optional	Not used if loading project team member. For activity team member: • If labor resource, this is the percentage of time the resource is allocated on the activity. • If non-labor resource, this is the quantity of the resource in terms of unit of measure.
18	UNIT_OF_MEASURE	Character	Optional	Not used if loading project team member. For activity team member, this is the unit of measure associated with the quantity, cost, and bill rates. Prompts from the UNITS_TBL table.
19	PGM_RATE_TYPE	Character	Optional	Indicates the source of the cost rate. “C” is for customer rate. “J” is for job code rate (for labor only. “E” is for employee rate (for labor only). “R” is for role rate (for labor only).
20	COST_RATE	Number	Optional	The cost rate for the resource.

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Field Number	Field Name	Type	Criteria	Description
21	CURRENCY_CD	Character	Optional	The currency code associated with the cost rate. Prompts for the CURRENCY_CD_TBL table.
22	BILL_RATE	Number	Optional	The bill rate for the resource.
23	BILL_RATE_TYPE_1	Character	Optional	Indicates the source of the billing rate. “C” is for customer rate. “J” is for jobcode rate (for labor only). “E” is for employee rate (for labor only). “R” is for role rate (for labor only).
24	BILL_CURRENCY_CD	Character	Optional	The currency code associated with the billing rate. Prompts for the CURRENCY_CD_TBL table.
25	ASSGND_WORK	Number	Optional	For labor resources only. Not used if loading project team member. For activity team member, this is the number of days, or hours, to which the resource is assigned. The units will be based on the unit of measure field.

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Field Number	Field Name	Type	Criteria	Description
26	BASELINE_WORK	Number	Optional	For labor resources only. For information only. Not used if loading project team member. For activity team member, this is the baseline (original) number of days, or hours, to which the resource is assigned. The units will be based on the unit of measure field.
27	INTFC_STATUS	Character	Optional	Set to “NEW” for loading. This will get updated to “DON” if loaded successfully, or “ERR” if an error is encountered.
28	LOAD_STATUS	Character	Optional	Populated in the Application Engine with NEW if not provided in the source file.
29	SOURCE_FLAG			The source where the team was created: • *G* – Proposal Management. • *M* – Microsoft Projects. • *P* – Project Costing. • *R* – Resource Management.
30	ERR_REASON			Can be left blank for loading. If an error is encountered during the load, this field is populated with the reason code.
31	PC_DURATION			Can be left blank for loading.

Transactions Interface Table Structure

This table lists the details of the Project Transaction Interface table structure:

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Field Number	Field Name	Type	Criteria	Description
1	INTFC_ID	Number	Required	Batch interface identifier.
2	INTFC_LINE_NUM	Number	Required	Unique batch line identifier.
3	PC_RES_INTF_SBR	Subrecord		
1 (PC_RES_INTF_SBR)	BUSINESS_UNIT	Character	Required	Prompts from the SP_BU_PC_NONVW table.
2 (PC_RES_INTF_SBR)	PROJECT_ID	Character	Required	Prompts from the SP_PROJ_NONVW table.
3 (PC_RES_INTF_SBR)	ACTIVITY_ID	Character	Required	Prompts from the PROJ_ACT_VW table.
4 (PC_RES_INTF_SBR)	RESOURCE_ID	Character	Optional	Resource ID.
5 (PC_RES_INTF_SBR)	RESOURCE_ID_FROM	Character	Optional	Resource ID from.
6 (PC_RES_INTF_SBR)	BUSINESS_UNIT_GL	Character	Required	Prompts from the SP_BUPCIT_NONVW table.
7 (PC_RES_INTF_SBR)	BUSINESS_UNIT_PC	Character	Optional	Project business unit.
8 (PC_RES_INTF_SBR)	JOURNAL_ID	Character	Optional	Journal ID.
9 (PC_RES_INTF_SBR)	JOURNAL_DATE	Date	Optional	Journal date.
10 (PC_RES_INTF_SBR)	UNPOST_SEQ	Number	Optional	Unpost sequence.
11 (PC_RES_INTF_SBR)	JOURNAL_LINE	Number	Optional	General ledger journal line number.
12 (PC_RES_INTF_SBR)	FISCAL_YEAR	Number	Optional	Fiscal year.
13 (PC_RES_INTF_SBR)	ACCOUNTING_PERIOD	Number	Optional	Accounting period.
14 (PC_RES_INTF_SBR)	ACCOUNT	Character	Optional	Prompts from the GL_ACCT_BUGL_VW table.
15 (PC_RES_INTF_SBR)	ALTACCT	Character	Optional	Prompts from the ALT_BUGL_VW table.

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Field Number	Field Name	Type	Criteria	Description
16 (PC_RES_INTF_SBR)	DEPTID	Character	Optional	Prompts from the DEPTID_BUGL_VW table.
17 (PC_RES_INTF_SBR)	CF16_AN_SBR	Character	Optional	ChartField subrecord.
1 (CF16_AN_SBR)	OPERATING_UNIT	Character	Optional	Prompts from the OPERUNT_BUGL_VW table.
2 (CF16_AN_SBR)	PRODUCT	Character	Optional	Prompts from the PRODUCT_BUGL_VW table.
3 (CF16_AN_SBR)	FUND_CODE	Character	Optional	Prompts from the FUND_BUGL_VW table.
4 (CF16_AN_SBR)	CLASS_FLD	Character	Optional	Prompts from the CLASSCF_BUGL_VW table.
5 (CF16_AN_SBR)	PROGRAM_CODE	Character	Optional	Prompts from the PROGRAM_BUGL_VW table.
6 (CF16_AN_SBR)	BUDGET_REF	Character	Optional	Prompts from the BUD_REF_BUGL_VW table.
7 (CF16_AN_SBR)	AFFILIATE	Character	Optional	Prompts from the AFFILIATE_VW table.
8 (CF16_AN_SBR)	AFFILIATE_INTRA1	Character	Optional	Intraunit affiliate 1.
9 (CF16_AN_SBR)	AFFILIATE_INTRA2	Character	Optional	Intraunit affiliate 2.
10 (CF16_AN_SBR)	CHARTFIELD1	Character	Optional	Prompts from the CF1_BUGL_VW table.
11 (CF16_AN_SBR)	CHARTFIELD2	Character	Optional	Prompts from the CF2_BUGL_VW table.
12 (CF16_AN_SBR)	CHARTFIELD3	Character	Optional	Prompts from the CF3_BUGL_VW table.
18 (PC_RES_INTF_SBR)	BUS_UNIT_GL_FROM	Character	Optional	Prompts from the Integration Template General Ledger table (PC_INT_TMPL_GL).
19 (PC_RES_INTF_SBR)	CURRENCY_CD	Character	Optional	Prompts from the Currency Codes table (CURRENCY_CD_TBL).

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Field Number	Field Name	Type	Criteria	Description
20 (PC_RES_INTF_SBR)	STATISTICS_CODE	Character	Optional	Prompts from the STAT_BUGL_VW table.
21 (PC_RES_INTF_SBR)	LEDGER_GROUP	Character	Optional	Prompts from the SP_LEDGPC_NONVW table.
22 (PC_RES_INTF_SBR)	ANALYSIS_TYPE	Character	Required	Analysis type.
23 (PC_RES_INTF_SBR)	RESOURCE_TYPE	Character	Optional	Prompts from the Project Resource Type table (PROJ_RES_TYPE).
24 (PC_RES_INTF_SBR)	RESOURCE_CATEGORY	Character	Optional	Category.
25 (PC_RES_INTF_SBR)	RESOURCE_SUB_CAT	Character	Optional	Subcategory.
26 (PC_RES_INTF_SBR)	RES_USER1	Character	Optional	Transaction user 1.
27 (PC_RES_INTF_SBR)	RES_USER2	Character	Optional	Transaction user 2.
28 (PC_RES_INTF_SBR)	RES_USER3	Character	Optional	Transaction user 3.
29 (PC_RES_INTF_SBR)	RES_USER4	Character	Optional	Transaction user 4.
30 (PC_RES_INTF_SBR)	RES_USER5	Character	Optional	Transaction user 5.
31 (PC_RES_INTF_SBR)	TRANS_DT	Date	Optional	Transaction date.
32 (PC_RES_INTF_SBR)	ACCOUNTING_DT	Date	Optional	Accounting date.
33 (PC_RES_INTF_SBR)	JRNL_LN_REF	Character	Optional	Journal line reference.
34 (PC_RES_INTF_SBR)	OPEN_ITEM_STATUS	Character	Optional	Prompts from the field's translate values.
35 (PC_RES_INTF_SBR)	LINE_DESCR	Character	Optional	Journal line description.

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Field Number	Field Name	Type	Criteria	Description
36 (PC_RES_INTF_SBR)	JRNL_LINE_STATUS	Character	Optional	Prompts from the field's translate values.
37 (PC_RES_INTF_SBR)	JOURNAL_LINE_DATE	Date	Optional	Journal line date.
38 (PC_RES_INTF_SBR)	FOREIGN_CURRENCY	Character	Optional	Prompts from the FRGN_CURR_VW table.
39 (PC_RES_INTF_SBR)	RT_TYPE	Character	Optional	Prompts from the Market Rate Data Types table (RT_TYPE_TBL).
40 (PC_RES_INTF_SBR)	FOREIGN_AMOUNT	Sign	Optional	Foreign amount.
41 (PC_RES_INTF_SBR)	RATE_MULT	Sign	Optional	Rate multiplier.
42 (PC_RES_INTF_SBR)	RATE_DIV	Number	Optional	Rate divisor.
43 (PC_RES_INTF_SBR)	CUR_EFFDT	Date	Optional	Currency effective date.
44 (PC_RES_INTF_SBR)	PROCESS_INSTANCE	Number	Optional	Process instance.
45 (PC_RES_INTF_SBR)	PC_DISTRIB_STATUS	Character	Optional	Prompts from the field's translate values.
46 (PC_RES_INTF_SBR)	GL_DISTRIB_STATUS	Character	Optional	Prompts from the field's translate values.
47 (PC_RES_INTF_SBR)	PROJ_TRANS_TYPE	Character	Optional	Prompts from the Project Transaction Types table (PROJ_TRANS_TYPE).
48 (PC_RES_INTF_SBR)	PROJ_TRANS_CODE	Character	Optional	Prompts from the Project Transaction Codes table (PROJ_TRANS_CODE).
49 (PC_RES_INTF_SBR)	RESOURCE_STATUS	Character	Optional	Transaction status.
50 (PC_RES_INTF_SBR)	DESCR	Character	Optional	Description.

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Field Number	Field Name	Type	Criteria	Description
51 (PC_RES_INTF_SBR)	SYSTEM_SOURCE	Character	Optional	Prompts from the field's translate values.
52 (PC_RES_INTF_SBR)	UNIT_OF_MEASURE	Character	Optional	Prompts from the Units of Measure table (UNITS_TBL).
53 (PC_RES_INTF_SBR)	EMPLID	Character	Optional	Prompts from the PROJ_TEAM_VW table.
54 (PC_RES_INTF_SBR)	EMPL_RCD	Number	Optional	Employee record number.
55 (PC_RES_INTF_SBR)	SEQ_NBR	Number	Optional	Sequence number.
56 (PC_RES_INTF_SBR)	TIME_RPTG_CD	Character	Optional	Time reporting code.
57 (PC_RES_INTF_SBR)	JOBCODE	Character	Optional	Job code.
58 (PC_RES_INTF_SBR)	COMPANY	Character	Optional	Company.
59 (PC_RES_INTF_SBR)	BUSINESS_UNIT_AP	Character	Optional	Prompts from the SP_BU_AP_NONVW table.
60 (PC_RES_INTF_SBR)	VENDOR_ID	Character	Optional	Prompts from the PROJ_VENDOR_VW table.
61 (PC_RES_INTF_SBR)	VOUCHER_ID	Character	Optional	Voucher ID.
62 (PC_RES_INTF_SBR)	VOUCHER_LINE_NUM	Number	Optional	Voucher line number.
63 (PC_RES_INTF_SBR)	APPL_JRNL_ID	Character	Optional	Prompts from the Journal Generator template table (JRNLGEN_APPL_ID).
64 (PC_RES_INTF_SBR)	PYMNT_CNT	Number	Optional	Payments.
65 (PC_RES_INTF_SBR)	DST_ACCT_TYPE	Character	Optional	Prompts from the field's translate values.
66 (PC_RES_INTF_SBR)	PO_DISTRIB_STATUS	Character	Optional	Prompts from the field's translate values.

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Field Number	Field Name	Type	Criteria	Description
67 (PC_RES_INTF_SBR)	BUSINESS_UNIT_PO	Character	Optional	Prompts from the SP_BU_PM_NONVW table.
68 (PC_RES_INTF_SBR)	REQ_ID	Character	Optional	Requisition ID.
69 (PC_RES_INTF_SBR)	REQ_LINE_NBR	Number	Optional	Requisition line number.
70 (PC_RES_INTF_SBR)	REQ_SCHED_NBR	Number	Optional	Requisition schedule number.
71 (PC_RES_INTF_SBR)	REQ_DISTRIB_NBR	Number	Optional	Requisition distribution number.
72 (PC_RES_INTF_SBR)	PO_ID	Character	Optional	Purchase order number.
73 (PC_RES_INTF_SBR)	DUE_DATE	Date	Optional	Delivery due date from.
74 (PC_RES_INTF_SBR)	LINE_NBR	Number	Optional	Line number.
75 (PC_RES_INTF_SBR)	SCHED_NBR	Number	Optional	Schedule number.
76 (PC_RES_INTF_SBR)	DISTRIB_LINE_NUM	Number	Optional	Distribution line.
77 (PC_RES_INTF_SBR)	AM_DISTRIB_STATUS	Character	Optional	Prompts from the field's translate values.
78 (PC_RES_INTF_SBR)	BUSINESS_UNIT_AM	Character	Optional	Prompts from the SP_BU_AM_NONVW table.
79 (PC_RES_INTF_SBR)	ASSET_ID	Character	Optional	Prompts from the PROJ_ASSET_VW table.
80 (PC_RES_INTF_SBR)	PROFILE_ID	Character	Optional	Prompts from the PROFILE_PCAM_VW table.
81 (PC_RES_INTF_SBR)	COST_TYPE	Character	Optional	Prompts from the Asset Cost Type Definition table (COST_TYPE_TBL).
82 (PC_RES_INTF_SBR)	BOOK	Character	Optional	Asset book name.

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Field Number	Field Name	Type	Criteria	Description
83 (PC_RES_INTF_SBR)	INCENTIVE_ID	Character	Optional	Prompts from the PC_PROJ_GNT_VW table.
84 (PC_RES_INTF_SBR)	MSTONE_SEQ	Number	Optional	Milestone sequence.
85 (PC_RES_INTF_SBR)	CONTRACT_NUM	Character	Optional	Prompts from the CA_CONTRACT_VW table.
86 (PC_RES_INTF_SBR)	CONTRACT_LINE_NUM	Number	Optional	Contract line number.
87 (PC_RES_INTF_SBR)	CONTRACT_PPD_SEQ	Number	Optional	Prepaid add sequence.
88 (PC_RES_INTF_SBR)	BI_DISTRIB_STATUS	Character	Optional	Prompts from the field's translate values.
89 (PC_RES_INTF_SBR)	BUSINESS_UNIT_BI	Character	Optional	Prompts from the SP_BU_BI_NONVW table.
90 (PC_RES_INTF_SBR)	BILLING_DATE	Date	Optional	Billing date.
91 (PC_RES_INTF_SBR)	INVOICE	Character	Optional	Invoice.
92 (PC_RES_INTF_SBR)	REV_DISTRIB_STATUS	Character	Optional	Prompts from the field's translate values.
93 (PC_RES_INTF_SBR)	BUSINESS_UNIT_AR	Character	Optional	Prompts from the SP_BUARED_NONVW table.
94 (PC_RES_INTF_SBR)	CUST_ID	Character	Optional	Prompts from the PROJ_CUST_VW table.
95 (PC_RES_INTF_SBR)	ITEM	Character	Optional	Prompts from the ITEM_OPEN_PC_VW table.
96 (PC_RES_INTF_SBR)	ITEM_LINE	Number	Optional	Item line.
97 (PC_RES_INTF_SBR)	ITEM_SEQ_NUM	Number	Optional	Item sequence number.
98 (PC_RES_INTF_SBR)	DST_SEQ_NUM	Number	Optional	Distribution sequence.
99 (PC_RES_INTF_SBR)	BUSINESS_UNIT_IN	Character	Optional	Prompts from the SP_BUIN_NONVW table.

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Field Number	Field Name	Type	Criteria	Description
100 (PC_RES_INTF_SBR)	SCHED_LINE_NO	Number	Optional	Schedule line number.
101 (PC_RES_INTF_SBR)	DEMAND_LINE_NO	Number	Optional	Demand line number.
102 (PC_RES_INTF_SBR)	INV_ITEM_ID	Character	Optional	Prompts from the PROJ_ITEM_VW table.
103 (PC_RES_INTF_SBR)	PAY_END_DT	Date	Optional	Pay period end date.
104 (PC_RES_INTF_SBR)	BUSINESS_UNIT_OM	Character	Optional	Prompts from the SP_BUPCOM_NONVW table.
105 (PC_RES_INTF_SBR)	ORDER_NO	Character	Optional	Order number.
106 (PC_RES_INTF_SBR)	ORDER_INT_LINE_NO	Number	Optional	Order line number.
107 (PC_RES_INTF_SBR)	EX_DOC_ID	Character	Optional	PeopleSoft Expenses document ID.
108 (PC_RES_INTF_SBR)	EX_DOC_TYPE	Character	Optional	Prompts from the field's translate values.
109 (PC_RES_INTF_SBR)	RESOURCE_QUANTITY	Sign	Optional	Quantity.
110 (PC_RES_INTF_SBR)	RESOURCE_AMOUNT	Sign	Optional	Project business unit amount.
111 (PC_RES_INTF_SBR)	BUDGET_HDR_STATUS	Character	Optional	Prompts from the field's translate values.
112 (PC_RES_INTF_SBR)	KK_AMOUNT_TYPE	Character	Optional	Prompts from the field's translate values.
113 (PC_RES_INTF_SBR)	KK_TRAN_OVER_FLAG	Character	Optional	Override transaction.
114 (PC_RES_INTF_SBR)	KK_TRAN_OVER_OPRID	Character	Optional	Override user ID.
115 (PC_RES_INTF_SBR)	KK_TRAN_OVER_DTTM	DtTm	Optional	Override date.
116 (PC_RES_INTF_SBR)	BUDGET_OVER_ALLOW	Character	Optional	Budget overrun allowed.

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Field Number	Field Name	Type	Criteria	Description
117 (PC_RES_INTF_SBR)	BUDGET_LINE_STATUS	Character	Optional	Prompts from the field's translate values.
118 (PC_RES_INTF_SBR)	BUDGET_DT	Date	Optional	Budget date.
119 (PC_RES_INTF_SBR)	LEDGER	Character	Optional	Prompts from the SP_LEDPC_NONVW table.
120 (PC_RES_INTF_SBR)	BD_DISTRIB_STATUS	Character	Optional	Prompts from the translate values of the field.
121 (PC_RES_INTF_SBR)	BUSINESS_UNIT_BD	Character	Optional	Prompts from the SP_BUPCBD_NONVW table.
122 (PC_RES_INTF_SBR)	FA_STATUS	Character	Optional	F&A status.
123 (PC_RES_INTF_SBR)	TIME_SHEET_ID	Character	Optional	Time report ID.
124 (PC_RES_INTF_SBR)	SHEET_ID	Character	Optional	Report ID.
125 (PC_RES_INTF_SBR)	DT_TIMESTAMP	DtTm	Optional	Date timestamp.
126 (PC_RES_INTF_SBR)	VCHR_DIST_LINE_NUM	Number	Optional	Distribution line number.
127 (PC_RES_INTF_SBR)	PM_REVIEWED	Character	Optional	Prompts from the field's translate values.
128 (PC_RES_INTF_SBR)	PRICED_RATE	Sign	Optional	Priced rate.
129 (PC_RES_INTF_SBR)	ACTIVITY_ID_DETAIL	Character	Optional	Prompts from the Activity ID Detail Prompt table (PC_ACT_DETAIL).
130 (PC_RES_INTF_SBR)	CST_DISTRIB_STATUS	Character	Optional	Prompts from the field's translate values.
131 (PC_RES_INTF_SBR)	TXN_LMT_TRANS_ID	Character	Optional	Transaction limit ID.
132 (PC_RES_INTF_SBR)	EVENT_NUM	Number	Optional	Event number.

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Field Number	Field Name	Type	Criteria	Description
133 (PC_RES_INTF_SBR)	CA_FEE_STATUS	Character	Optional	Prompts from the field's translate values.
134 (PC_RES_INTF_SBR)	WM_WO_SBR	Subrecord	Optional	PeopleSoft Maintenance Management work order subrecord.
1 (WM_WO_SBR)	BUSINESS_UNIT_WO	Character	Optional	Work order business unit. Prompts from the SP_BU_WM_NONVW table.
2 (WM_WO_SBR)	WO_ID	Character	Optional	Work order ID. Prompts from the WM_WO_NOT_CLSD table.
3 (WM_WO_SBR)	WO_TASK_ID	Number	Optional	Task number. Prompts from the WM_WO_TSK_NCLSD table.
4 (WM_WO_SBR)	RSRC_TYPE	Character	Optional	Resource type. Prompts from the translate values of the field.
5 (WM_WO_SBR)	RES_LN_NBR	Number	Optional	Resource line number.
135 (PC_RES_INTF_SBR)	FMS_WHO_SBR	Subrecord	Optional	Date, time, and operator subrecord.
1 (FMS_WHO_SBR)	FMS_DTTM_STAMP	DtTm	Optional	Date/time stamp.
2 (FMS_WHO_SBR)	FMS_OPRID	Character	Optional	Operator ID.
3 (FMS_WHO_SBR)	FMS_LASTUPDDTTM	DtTm	Optional	Last update date/time.
4 (FMS_WHO_SBR)	FMS_LASTUPDOPRID	Character	Optional	Last update user ID.
4	INTFC_TYPE	Character	Optional	Not used in the transactions interface.
5	PC_INTFC_STATUS	Character	Required	Populate the field with *NEW*.
6	PC_LOAD_STATUS	Character	Required	Populate the field with *NEW*.
7	START_DT	Date		
8	ORIG_INTFC_ID	Number	Optional	Not used in the transactions interface.

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Field Number	Field Name	Type	Criteria	Description
9	ORIG_LINE_NUM	Number	Optional	Not used in the transactions interface.
10	INTEGRATION_TMPL	Character	Optional	Not used in the transactions interface.
11	QUANTITY	Sign		Quantity interface.
12	DESCR254	Character	Optional	Not used in the transactions interface.
13	SETID	Character	System-maintained	Not used in the transactions interface.
14	MESSAGE_SET_NBR	Number	System-maintained	Edit errors message set.
15	MESSAGE_NBR	Number	System-maintained	Edit errors message number.
16	COMBO_STATUS	Character	Conditional	Populate the field with *V* (valid) if ChartField combination edits are performed.
17	CURRENCY_CD_GL	Character	System-maintained	Used in Commitment Control budgeting.
18	MONETARY_AMOUNT	Sign	System-maintained	Used in Commitment Control budgeting.
19	KK_DISTRIB_STATUS	Character	Optional	Populate this field with *N* (none) if the transaction is to be billed. If the transaction needs to be budget checked, provide a value of *B*. The default value is *N* if a value is not provided in the source table.
20	KK_SOURCE_TRAN	Character	Optional	Not used in the transactions interface.
21	PC_MSP_AE6	Character	Optional	Not used in the transactions interface.
22	PC_MSP_AE2	Character	Optional	Not used in the transactions interface.

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Field Number	Field Name	Type	Criteria	Description
23	PC_MSP_AE6	Character	Conditional	Not used in the transactions interface.
24	FIELDNAME	Character	System-maintained	Edit errors field name.
25	PC_BUDGET_ID	Number	Optional	Budget plan ID. If the budget ID does not exist in the Project Budget Plan table (PC_BUD_PLAN), the process creates a budget ID, indicating that a new budget is being integrated.
26	BUDGET_PERIOD	Character	Conditional	Budget period. This field is required if the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
27	PC_BUDGET_ITEM	Character	Conditional	Project budget item. Prompts from the PC_BUD_ITM_VW table. This field is required if the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
28	BUDGET_LN	Number	Conditional	Budget line number. This field is required if the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
29	PROJ_ROLE	Character	Optional	Project role. Prompts from the PROJ_ROLE_SECVW table.

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Field Number	Field Name	Type	Criteria	Description
30	KK_BUDG_LN_TYPE	Character	Conditional	Budget line code. If Commitment Control is enabled, populate this field based on the translate values of the KK_BUDG_LN_TYPE field.
31	BD_HDR_STATUS	Character	Optional	Budget header status. The default value is *N* (the posting has not been run against the journal).
32	GM_FA_SEQ_FLG	Character	Optional	Fixed and administrative flag that is used by the PeopleSoft Grants system.
33	GM_CS_SEQ_FLG	Character	Optional	Cost sharing flag that is used by the PeopleSoft Grants system.
34	FUND_SOURCE	Character	Optional	Funding source. Prompts from the Funding Source table (KK_FUND_SOURCE).
35	GM_DISTRIB_STATUS	Character	Optional	Distribution status that is used by the PeopleSoft Grants system.
36	PC_BUD_TYPE	Character	Optional	If a budget type does not exist in the source file, the default value is cost budget.
37	BUDGET_CATEGORY	Character	Conditional	Budget item. Prompts from the Budget Category Control table (GM_BUD_CATEGORY). This field is required if the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.

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Field Number	Field Name	Type	Criteria	Description
38	NUM_PERIODS	Number	Optional	Number of time periods.
39	ACT_UID	Character	Optional	Task ID.
40	RES_UID	Character	Optional	Resource ID.
41	PC_HOURS_PER_DAY	Number	Optional	Hours per day.
42	PC_FORECAST	Number	Optional	Forecast units to load into Forecasting.
43	PC_FORCAST_REMAIN	Number	Optional	Remaining forecast units to load into Forecasting.
44	STATUS_STRING	Character	Optional	String text.
45	START_DATE	Date	Optional	Start date for Gen Stand.
46	END_DATE	Date	Optional	End date.
47	LOAD_STATUS	Character	Optional	Load status.
48	CALENDAR_ID	Character	Conditional	Calendar ID. This field is required if the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
49	ENTRY_EVENT	Character	Conditional	Prompts from the EE_BUD_CODES_VW table. This field is required if Commitment Control and Projects Budgeting are enabled, and the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.

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Field Number	Field Name	Type	Criteria	Description
50	KK_DEFAULT_EE	Character	Conditional	Default entry event. This field is required if Commitment Control and Projects Budgeting are enabled, and the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
51	KK_GEN_PARENT	Character	Conditional	Generate parent budget. This field is required if Commitment Control and Projects Budgeting are enabled, and the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
52	KK_PARENT_ENT_TYPE	Character	Conditional	Parent budget entry type, such as original or adjustment. This field is required if Commitment Control and Projects Budgeting are enabled, and the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.

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Field Number	Field Name	Type	Criteria	Description
53	KK_BUDG_TRANS_TYPE	Character	Conditional	Budget entry type, such as original, adjustment, transfer, and so on. This field is required if Commitment Control and Projects Budgeting are enabled, and the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
54	PC_KK_AE_TYPE	Character	Conditional	Commitment Control type, such as budget creation or budget check. This field is required if Commitment Control and Projects Budgeting are enabled, and the analysis type provided for the transaction line is from the Budget analysis group that is specified at the installation level.
55	EE_PROC_STATUS	Character	Optional	Entry Event line status.

Reviewing and Modifying Interface Table Data

Pages Used to Review and Modify Interface Table Data

Page Name	Definition Name	Usage
Review Project Definition Page	INTFC_PROJ_GEN_01	Review and edit third-party application project details in the Projects Interface staging table.

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Page Name	Definition Name	Usage
Review Project Definition - Description Page	INTFC_PROJ_GEN_02	Review and edit third-party application project description details in the Projects Interface staging table.
Review Project Definition - Status Page	INTFC_PROJ_GEN_03	Review and edit third-party application project status details in the Projects Interface staging table.
Review Project Definition - Manager Page	INTFC_PROJ_GEN_04	Review and edit third-party application project manager details in the Projects Interface staging table before you load data from the interface tables into PeopleSoft Project Costing tables.
Review Project Definition - Location Page	INTFC_PROJ_GEN_05	Review and edit third-party application project location details in the Projects Interface staging table.
Review Project Definition - Team Page	INTFC_PROJ_GEN_06	Review and edit third-party application team security setting in the Projects Interface staging table.
Review Project Definition - Phases Page	INTFC_PROJ_GEN_07	Review and edit third-party application project phase details in the Projects Interface staging table.
Review Project Definition - Schedule Integration Page	INTFC_PROJ_GEN_09	Build new project trees and add new projects from third-party application data.
Review Activity Details Page	INTFC_ACT_GEN_01	Review and edit third-party application activity details in the Activities Interface staging table.
Review Activity Details - Description Page	INTFC_ACT_GEN_02	Review and edit third-party application activity description details in the Activity Interface staging table.
Review Activity Details - Status Page	INTFC_ACT_GEN_03	Review and edit third-party application activity status details in the Activity Interface staging table.
Review Activity Details - Location Page	INTFC_ACT_GEN_05	Review and edit third-party application activity location details in the Activity Interface staging table.
Review Activity Details - Quality Page	INTFC_ACT_GEN_06	Review and edit third-party application activity quality details in the Activities Interface staging table.
Review Resource Details Page	INTFC_TEAM_GEN	Review and modify resource interface data that is in the staging table.

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Page Name	Definition Name	Usage
Review Transaction Details Page	INTFC_PROJ_RES_01	Review and edit third-party application transaction source data details in the Transactions Interface table.
Review Transaction Details - Source Data Page	INTFC_PROJ_RES_02	Review and edit third-party application transaction source data details in the Transactions Interface table.
Review Transaction Details - General Ledger Chartfield Data Page	INTFC_PROJ_RES_03	Review and edit third-party application transaction general ledger ChartField data details in the Transactions Interface table.

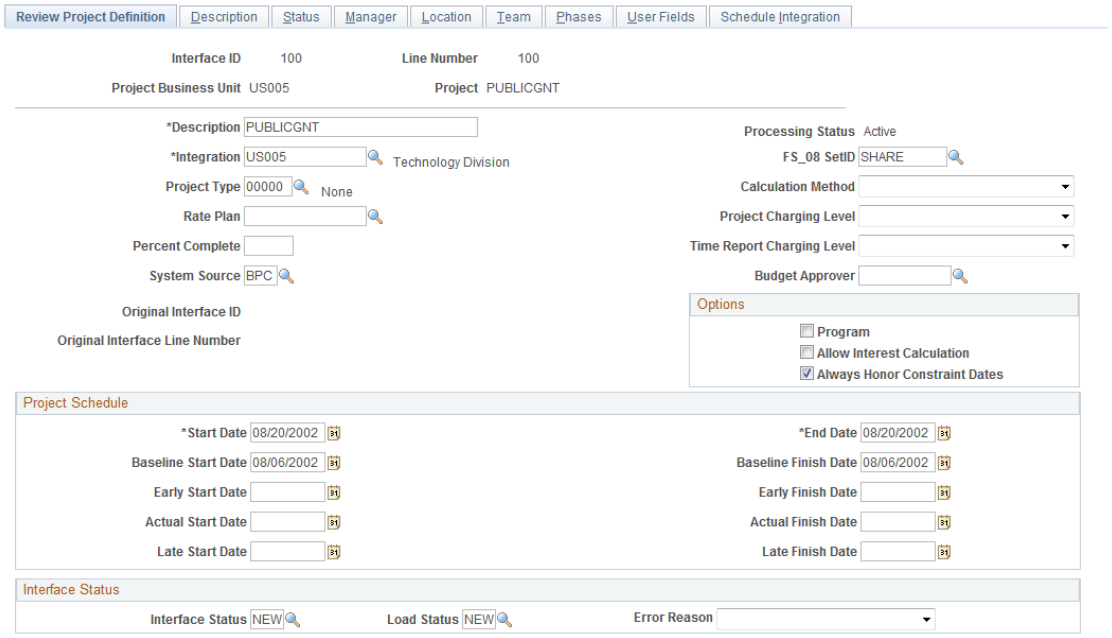
Review Project Definition Page

Use the Review Project Definition page (INTFC_PROJ_GEN_01) to review and edit third-party application project details in the Projects Interface staging table.

Navigation:

Project Costing, and then **Third Party Integration**, and then **3rd Party Intgrtn Project Dtl**, and then **Review Project Definition**

This example illustrates the fields and controls on the Review Project Definition page.



Use the pages in the Projects Interface component (INTFC_PROJ_GEN) to review and modify project details in the Projects Interface staging table before you run the Load Projects and Activities process to load them into PeopleSoft Project Costing tables.

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These fields are available on the Review Project Definition page only if you use PeopleSoft Program Management:

- Calculation Method
- Project Charging Level
- Time Report Charging Level
- Budget Approver
- Always Honor Constraint Dates

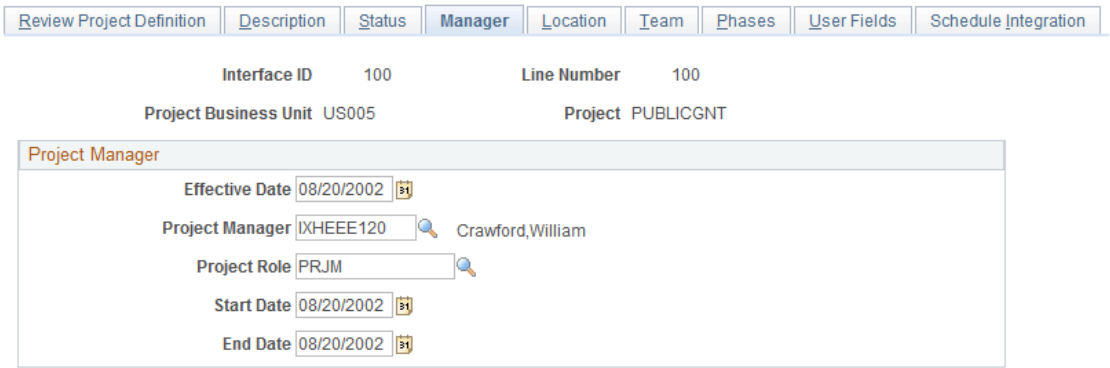
Review Project Definition - Manager Page

Use the Review Project Definition - Manager page (INTFC_PROJ_GEN_04) to review and edit third-party application project manager details in the Projects Interface staging table before you load data from the interface tables into PeopleSoft Project Costing tables.

Navigation:

Select the Manager tab on the Review Project Definition page.

This example illustrates the fields and controls on the Review Project Definition - Manager page. You can find definitions for the fields and controls later on this page.



The Load Projects and Activities process uses the data on this page to insert a row in the Project Manager, Project Team Member, and Project Team Member Schedule tables for the project manager.

Field or Control	Description
Effective Date	Review the effective date of the project manager, which must equal the project manager's start date.
Project Manager	All fields on this page are required if a project manager exists in this field.
Project Role	Review the project manager's project role.
Start Date	Review the project manager's start date, which must equal the project manager's effective date. The start date must be earlier than the end date, and must be within the project start and end dates.

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Field or Control	Description
End Date	Review the project manager's end date. The end date must be later than the start date, and must be within the project start and end dates.

The process uses these default values when creating rows for project managers or team members in the Project Team Member and Project Team Member Schedule tables:

- Resource classification: *Labor*
- Team member type: *Employee*
- Resource status: *Considered*
- PeopleSoft Program Management rate type: *Custom*
- Availability units: *100*
- Unit of measure, currency code, and scheduled hours are from the business unit.

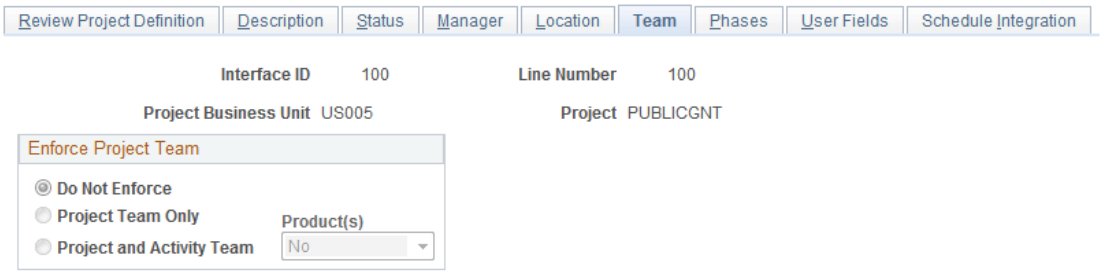
Review Project Definition - Team Page

Use the Review Project Definition - Team page (INTFC_PROJ_GEN_06) to review and edit third-party application team security setting in the Projects Interface staging table.

Navigation:

Select the Team tab on the Review Project Definition page.

This example illustrates the fields and controls on the Review Project Definition - Team page . You can find definitions for the fields and controls later on this page.



Field or Control	Description
Enforce Project Team	Designate who can charge time and expenses to a project and activity by selecting an option in this group box. Options are available for selection on this page if you selected the **Decide at the Project Level** option on the Project Costing Options page for the business unit. See Project Costing Options Page.

Review Project Definition - Schedule Integration Page

Use the Review Project Definition - Schedule Integration page (INTFC_PROJ_GEN_09) to build new project trees and add new projects from third-party application data.

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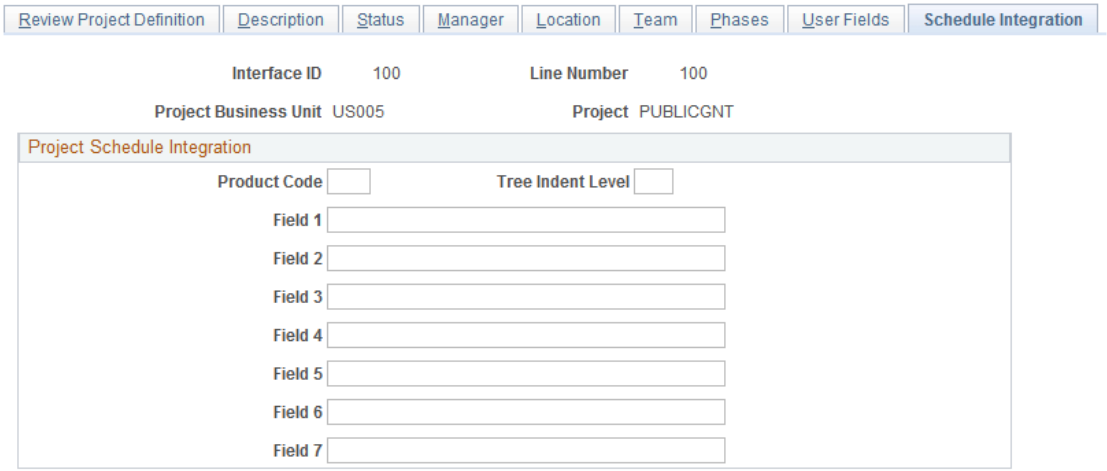
Navigation:

Select the Schedule Integration tab on the Review Project Definition page.

This example illustrates the fields and controls on the Review Project Details - Schedule Integration page. You can find definitions for the fields and controls later on this page.



You must enter a row of data on this page for each project and corresponding project node on the project tree.

Field or Control	Description
Project	The system assigns the next sequential project ID if you enter *NEXT* on the Review Project Definition - Add a New Value page.
Product Code	Enter a free-form code to assist you in identifying the origin of the project. For example, you can enter *ORA* to indicate that the project is loaded from an Oracle application.
Tree Indent Level	Enter the level, on the project tree, to which the current project belongs. Level 6 is the root node. A tree can contain only one root node.
Field 1	(Optional) Enter a third-party project ID if you are importing from a third-party product.
Field 2	(Optional) Enter a description of the third-party project.
Field 3	Enter a unique node ID, which is required for tree integration. If you are importing from a third-party application, use the unique node ID from the third-party application. If not, enter the project ID.
Field 4	(Optional) Enter a description of the node ID.
Field 5	Enter a parent node ID, which is required for tree integration. Only the root node (tree indent level 6) does not have a parent node ID.
Field 6	This field is not used for tree integration.

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Field or Control	Description
Field 7	This field is not used for tree integration.

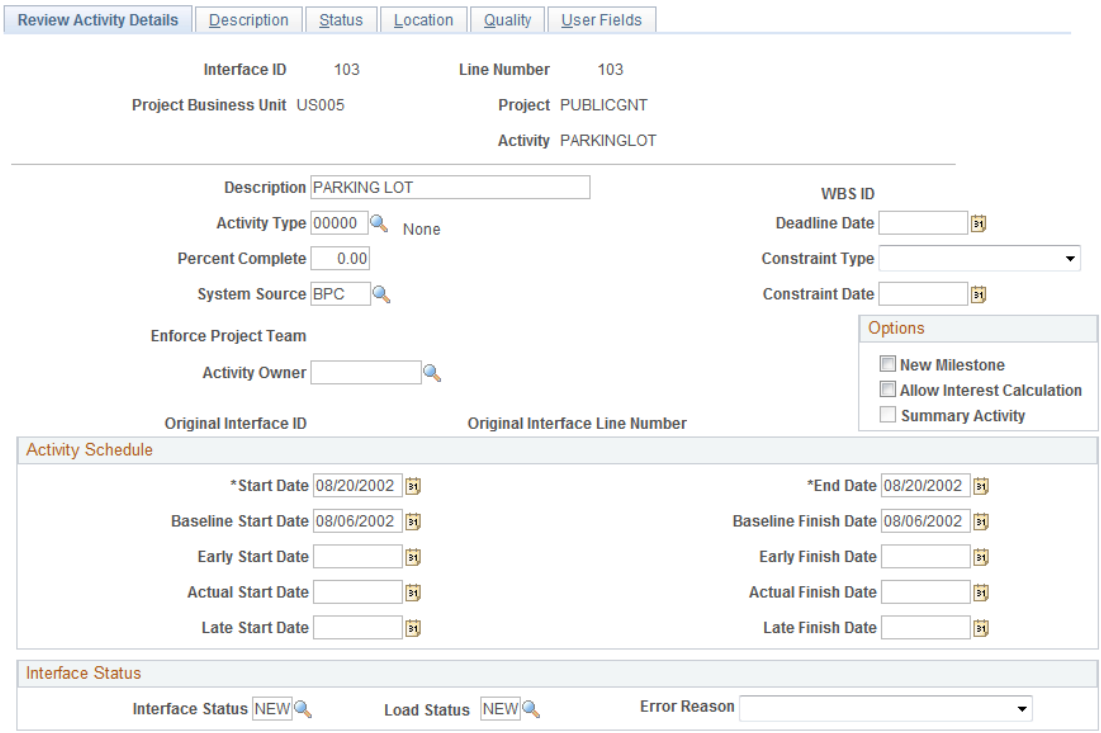
Review Activity Details Page

Use the Review Activity Details page (INTFC_ACT_GEN_01) to review and edit third-party application activity details in the Activities Interface staging table.

Navigation:

Project Costing, and then **Third Party Integration**, and then **Review 3rd Party Activity Dtl**

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



Use the pages in the Activities Interface component (INTFC_ACT_GEN) to review and modify activity details in the Activities Interface staging table before you run the Load Projects and Activities process to load them into PeopleSoft Project Costing tables.

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Field or Control	Description
WBS ID (work breakdown structure identifier)	Displays the position of this activity within the WBS of the project. For activities that you create from a third party other than Microsoft, this field is blank and will be system-generated after you run the Load Projects and Activities process to load them into PeopleSoft Project Costing tables. The process loads the new activities to the end of the existing project WBS, if one exists, at level 1. For example, if the last activity on the existing project WBS currently has a WBS ID of 5, the process adds new activities to the structure with WBS IDs of 6, 7, 8, and so on. Activities that you create from Microsoft are discussed in the Copying Data from Microsoft Project to PeopleSoft Project Costing topic
Summary Activity	The system activates this field if an activity that is created from a third-party application has child projects. This field is inactivated (deselected) if the project does not have child projects.

These fields are available only if you use PeopleSoft Program Management:

- Deadline Date
- Constraint Date
- Constraint Type

Related Topics

- PeopleSoft Program Management: Understanding Schedule Dependencies
- PeopleSoft Program Management: Understanding Activity Constraints
- PeopleSoft Program Management: Understanding Integration of Dependencies and Constraints with Microsoft Project
- PeopleSoft Program Management: Understanding Project Schedule Indicators
- PeopleSoft Program Management: Specifying Schedule Dependencies
- PeopleSoft Program Management: Specifying Activity Constraints

Review Resource Details Page

Use the Review Resource Details page (INTFC_TEAM_GEN) to review and modify resource interface data that is in the staging table.

Navigation:

Project Costing, and then **Third Party Integration**, and then **3rd Party Intgrtn Resource Dtl**

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

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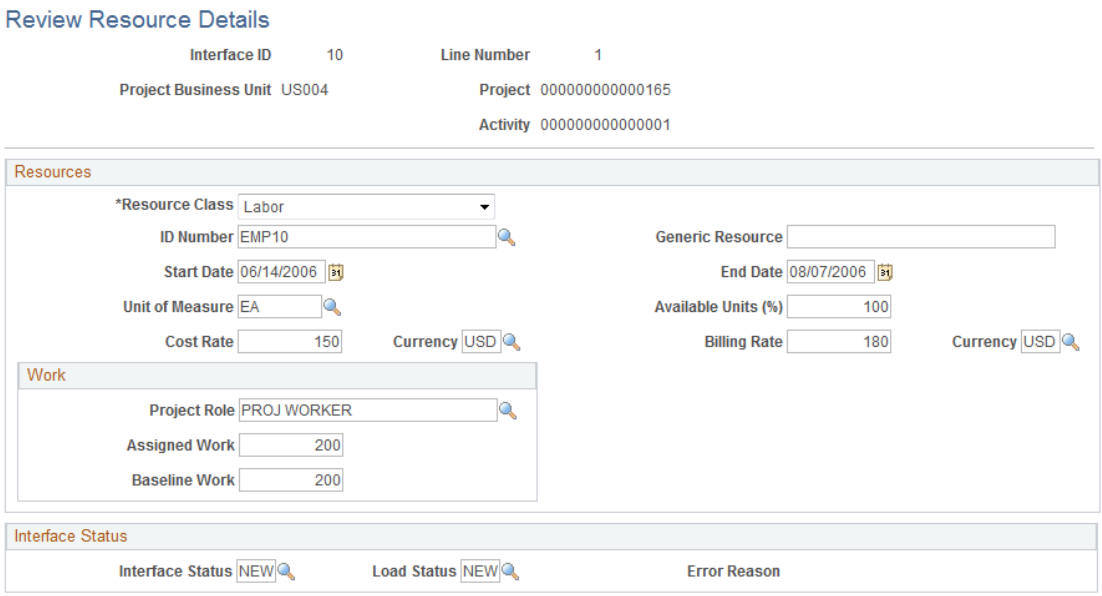

Use this page to view and update resource data that is in the staging table (INTFC_TEAM_GEN). This page displays data that has not been processed and data that was processed with errors.

Field or Control	Description
Resource Class	Select *Asset, Labor, Material,* or *Other*. The sections and fields on the page change depending on the selection in this field.

Review Transaction Details Page

Use the Review Transaction Details page (INTFC_PROJ_RES_01) to review and edit third-party application transaction source data details in the Transactions Interface table.

Navigation:

Project Costing, and then **Third Party Integration**, and then **Third Party Rvw Transactions**, and then **Review Transaction Details**

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

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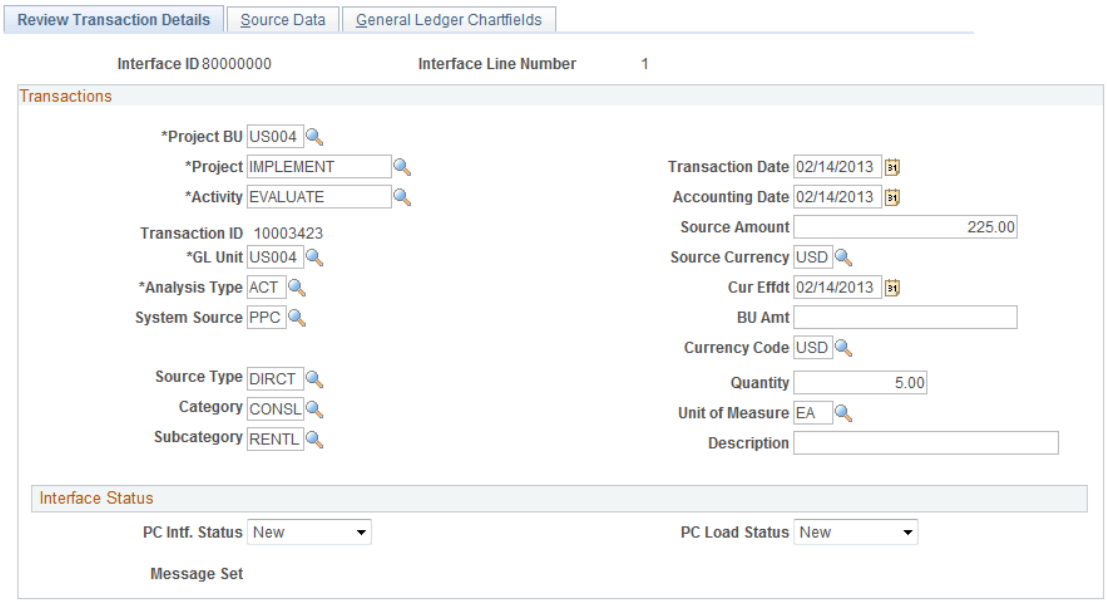

Use the pages in the Transactions Interface component (INTERFACE_RESOURCE) to review and modify transaction details in the Transactions Interface staging table before you run the Load Third-Party Transactions process to load them into the Project Transaction table (PROJ_RESOURCE).

> **Note**
>
> Budgetary ChartFields cannot be selected on the General Ledger ChartField Data page. Therefore, budget rows cannot be added on this page.

Loading Interface Table Data into PeopleSoft Project Costing

Pages Used to Load Interface Table Data into PeopleSoft Project Costing

Page Name	Definition Name	Usage
Load Projects and Activities Page	PC_INTF_GEN	Run the Load Projects and Activities process to load project and activity data into PeopleSoft Project Costing tables.
Load Transactions Page	PC_INTFEDIT	Run Load Third-Party Transactions to load transaction data into the Project Transaction table.

Related Topics

- PeopleSoft Program Management: Understanding Project Charging Levels

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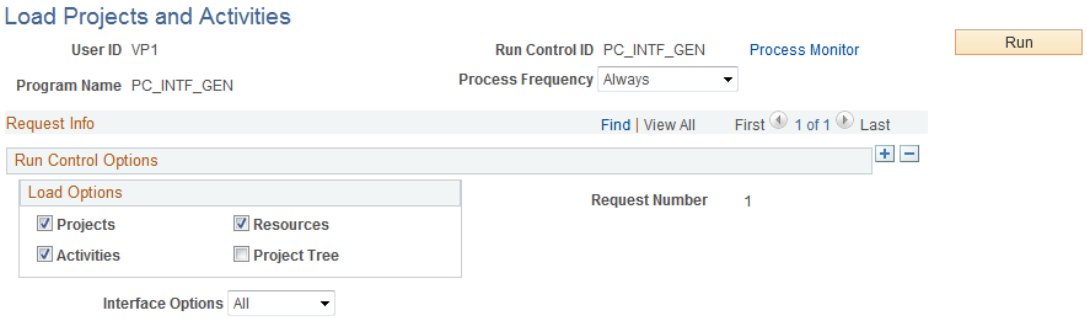
Load Projects and Activities Page

Use the Load Projects and Activities page (PC_INTF_GEN) to run the Load Projects and Activities process to load project and activity data into PeopleSoft Project Costing tables.

Navigation:

Project Costing, and then **Third Party Integration**, and then **Third Party Load Proj Activity**

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



After you stage data from third-party systems to its respective interface tables, you run the various PeopleSoft Application Engine processes to bring the data into PeopleSoft Project Costing tables.

If you use PeopleSoft Program Management, the Load Third-Party Transactions process loads only transactions for activities at the project costing level that is specified on the Program Management Options page. If the Application Engine processes a row that is not a valid costing activity, an error occurs and the transaction remains in the Transactions Interface table. You can view the error on the Review Transactions Details page.

Field or Control	Description
Load Options	Select the type of data to be loaded into PeopleSoft Project Costing tables. Available values are: • *Projects:* Select to load project data into PeopleSoft Project Costing tables. • *Activities:* Select to load activity data into PeopleSoft Project Costing tables. • *Resources:* Select to load project and activity team members into PeopleSoft Project Costing tables. • *Project Tree:* Select to load project tree data into PeopleSoft Project Costing tables and create or update a project tree, or append a project, to a project tree.

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Field or Control	Description
Interface Options	Select the interface option from these available values: • *All:* Select to process all interface IDs. • *Range:* Select to process a specific batch; enter the range of interface identifiers that you want to process in the **Interface ID** and **To Interface ID** fields. Select *Range* as the interface option if you select *Project Tree* in the **Load Options** field.

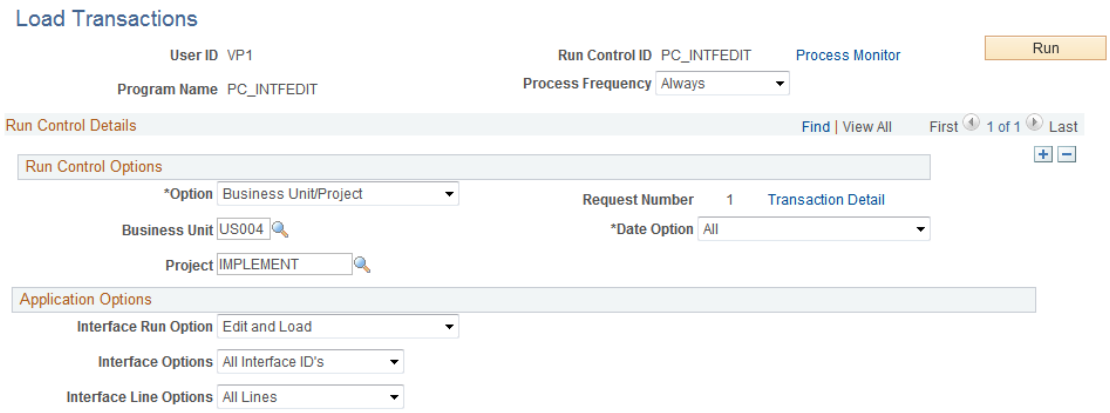
Load Transactions Page

Use the Load Transactions page (PC_INTFEDIT) to run Load Third-Party Transactions to load transaction data into the Project Transaction table.

Navigation:

Project Costing, and then **Third Party Integration**, and then **Third Party Load Transactions**

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



Field or Control	Description
Option	Select to run the Load Third-Party Transactions process for all transactions or for selected ones that you can filter by business unit, project, and activity.

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Field or Control	Description
Interface Run Option	Select from these available values: *Edit Only:* Select for the system to review data to ensure that all values are valid and exist in the applicable prompt table. This option does not load data into the Project Transaction table. The system assigns an Interface Status field (INTFC_STATUS) value of *DON* (mass change generated) to transactions that pass the edit process or *ERR* (error) to transactions that fail the edit process. *Edit and Load:* Select for the system to perform both editing and loading processes. This option takes the longest to run. *Load Only:* Select to load transactions that have an Interface Status field value of *DON.* After loading the *DON* transactions into the Project Transaction table, the Load Third-Party Transactions process deletes them from the Transactions Interface table. **Note:** Performance may vary depending on the option that you select. The *Edit and Load* option takes the longest amount of time to run.

The Load Third-Party Transactions process validates third-party application transaction data in the Transactions Interface table and loads the data into the Project Transaction table.

The Load Third-Party Transactions process calls the Multicurrency Conversion Application Engine process (PC_MULTI_CURRENCY) that converts source transaction amounts that come into the Transactions Interface table with a different currency code than the project business unit currency code, if you set up the appropriate exchange rates.

Error Processing

Each row in the Transactions Interface table can hold only one message number and offending field name. If a row has multiple errors, only the last error is stored in the **Message Number** (MESSAGE_NBR) and **Field Name** (FIELDNAME) fields.

You can view and correct the error on the Review Transaction Details page. When you correct the error and run the program again, the system writes only the second error to the **Message Number** and **Field Name** fields. Repeat the process to correct the remaining errors.

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Integrating with Microsoft Project

Understanding Integration of PeopleSoft Project Costing with Microsoft Project

This topic lists prerequisites and discusses:

- PeopleSoft Project Costing and Microsoft Project integration.
- Copying data from PeopleSoft Project Costing to Microsoft Project.
- Copying data from Microsoft Project to PeopleSoft Project Costing.

> **Note**
>
> As of FSCM Update Image 48, the integration with Microsoft Projects and PeopleSoft Project Costing is no longer supported. The Microsoft Integrator, in its current state, is still available, and customer can continue to use the functionality at their own discretion.
>
> Please note that all menu options (CREFs), objects, and source code remain on your system. As of FSCM Update Image 48 PeopleSoft does not support the integration with Microsoft Projects with all past, current, or future PeopleSoft Update Image.

Prerequisites

The PeopleSoft Project Costing integration is intended for use with Microsoft Project, desktop edition only. Projects residing in Microsoft Project Server must be saved locally by means of Microsoft Project Standard prior to integration. Before running the Microsoft Project Integration for the first time, you must:

- Install the PeopleSoft - Microsoft Project Integrator on the network.

  See *PeopleSoft Financials, ESA and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's My Oracle Support website.

- Specify the **Third-Party Data Exchange** default options on the Installation Options - Project Costing Integration page.

  See Application Fundamentals: Installation Options - Project Costing Integration Page.

The PeopleSoft - Microsoft Project Integrator is an application that must reside on at least one computer that is available on the network in order for integration to take place. The computer on which it resides requires these two components:

- FTP service or access to an FTP share directory.
- Microsoft Project application.

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See *PeopleSoft Financials, ESA and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's My Oracle Support website.

PeopleSoft Project Costing and Microsoft Project Integration

Integrating PeopleSoft Project Costing and Microsoft Project combines the PeopleSoft Project Costing project accounting capabilities with the Microsoft Project planning and scheduling features. The integration enables the PeopleSoft Project Costing and PeopleSoft Program Management applications to incorporate scheduling information for use across the enterprise and enables project managers to update their individual Microsoft Project files with actual costs, resources, schedules, and so forth from the PeopleSoft Enterprise applications.

The Microsoft Project integration allows for the transmission of data from PeopleSoft software to Microsoft software and vice versa. When you integrate, you can export data from PeopleSoft Project Costing to a Microsoft Project file or import data from a Microsoft Project file into the PeopleSoft system. You can run the integration either direction at any time, depending on the needs of the business and the project management methodology.

By using the integration of PeopleSoft Project Costing and Microsoft Project, you can synchronize:

- Projects.
- Project teams.
- Activities.
- Duration and date calculations.
- Percent-complete calculations.
- Budgets.
- Actual costs.
- Dependencies and constraints.

Additionally, if PeopleSoft Program Management is installed, the integration enables you to create and maintain assignments for labor, material, and assets at both the project and activity levels by using the Program Management functionality of the Resources, Resource Detail, and Resources by Activity pages.

The PeopleSoft Project Costing and Microsoft Project integration allows for the creation of projects in either application. The integration also allows for the transfer of tasks (in Microsoft Project) or activities (in PeopleSoft Project Costing) and their associated resource assignments. Microsoft Project's user-definable field objects store specific PeopleSoft Project Costing fields such as business unit and project ID. Microsoft Project also stores the PeopleSoft Project Costing project and activity definition, description, status, manager, percent complete for the activity, budgets, dates, and duration.

Data Flow

Four ways are available to integrate project data between PeopleSoft software and Microsoft software:

Integration Procedure	Flow of Data
Create a project in Microsoft software from an existing PeopleSoft project.	Export from PeopleSoft software to Microsoft software.
Update a Microsoft Project with data from PeopleSoft software.	Export from PeopleSoft software to Microsoft software.

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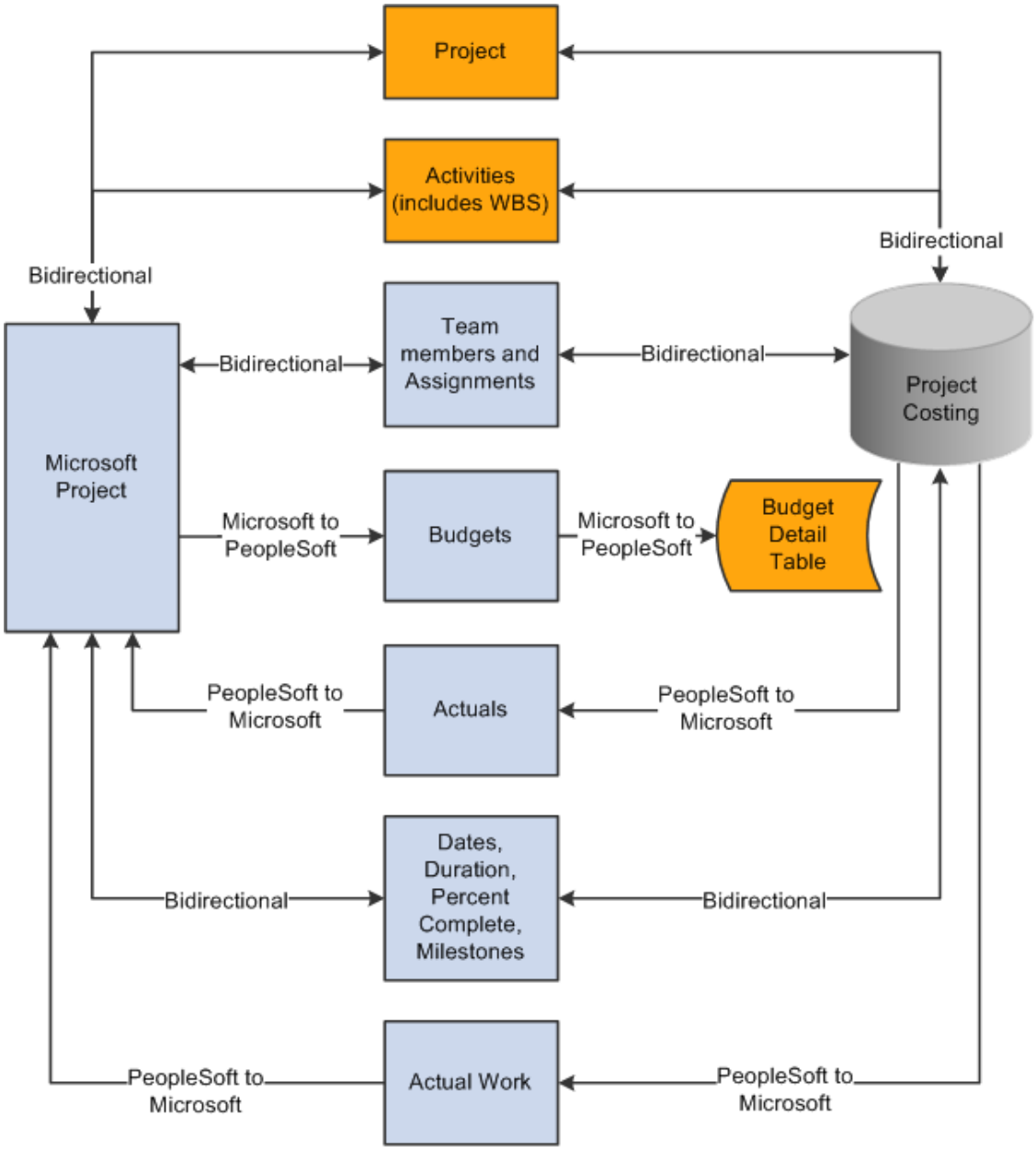
Integration Procedure	Flow of Data
Update a PeopleSoft project with data from Microsoft software.	Import from Microsoft software to PeopleSoft software.
Create a project in PeopleSoft software from an existing Microsoft project.	Import from Microsoft software to PeopleSoft software.

This diagram is a high-level view of the integration data flow:



This table lists the types of data that are exchanged and the direction of the data flow:

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Data Type	Direction
Project data.	Bidirectional.
Project team (resources).	Bidirectional if PeopleSoft Program Management is not installed.
Activity or task.	Bidirectional.
Team or task assignments.	Bidirectional if PeopleSoft Program Management is installed.
Job codes.	PeopleSoft to Microsoft from project team if PeopleSoft Program Management is not installed.
Cost and bill rates.	Bidirectional if you use override rates.
Budget items.	Bidirectional.
Actual costs.	PeopleSoft to Microsoft.
Budget costs.	Microsoft to PeopleSoft.
Work.	PeopleSoft to Microsoft.
Dates.	Bidirectional.
Percent complete (activity level).	Bidirectional.
Percent complete (project level if calculation method is manual).	Microsoft to PeopleSoft.
Duration.	Bidirectional.
Milestones.	Bidirectional.

Terminology

This table describes terms that are relevant to the integration between PeopleSoft Project Costing and Microsoft Project:

Term	Description
Activity	A project component that the system uses to capture charges that relate to that aspect of the project, and a representation of the work that is required to complete part of a project. In Microsoft Project, activities are called tasks.
Actual Work	Tracks the actual number of hours spent by a labor resource on an activity. PeopleSoft Project Costing sends actual work information to Microsoft Project from rows in the Project Transaction table that have a system source of *BEX*, which identifies rows that came from PeopleSoft Expenses. The Expenses to Project Costing Application Engine process (PC_EX_TO_PC) updates actual work in PeopleSoft Project Costing. Actual work is not updated from Microsoft Project to PeopleSoft Project Costing.

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Term	Description
Resources	People, equipment, and material that are required for completing the project and the activities that are on the project. Resources can have rates associated with them for the purposes of deriving their estimated and actual costs to an activity and a project.
Start Date	A required field that represents the current start date of the project and activity. The start date can be entered in PeopleSoft software or Microsoft software. Given the duration and end date of a project or activity, the system can calculate the start date.
End Date	A required field that represents the current end date of the project and activity. The end date can be entered in PeopleSoft software or Microsoft software. The end date can be calculated if values are available for the duration and start dates.
Baseline Start Date	The planned beginning date of a project or activity. This field can be entered in PeopleSoft software or Microsoft software.
Baseline Finish Date	The planned completion date of a project or activity. This field can be entered in PeopleSoft software or Microsoft software.
Actual Start Date	The date on which the project or activity actually begins. It can be entered in PeopleSoft software or Microsoft software based on progress information that you enter.
Actual Finish Date	The date on which the project or activity actually finishes.
Late Start Date	Represents the latest date that an activity or task can start without delaying the finish of the project. This date is based on the task's start date, the late start and late finish dates of predecessor and successor tasks, and other constraints.
Late Finish Date	Represents the latest date that an activity or task can finish without delaying the finish of the project. This date is based on the task's late start date, the late start and late finish dates of predecessor and successor tasks, and other constraints. This field can be entered in PeopleSoft software or Microsoft software.
Early Start Date	Represents the earliest date that an activity or task can possibly begin, based on the early start dates of predecessor and successor tasks, and other constraints. This field can be entered in PeopleSoft software or Microsoft software.
Early Finish Date	Represents the earliest date that an activity or task can possibly finish, based on early finish dates of predecessor and successor tasks, other constraints, and any leveling delay. This field can be entered in PeopleSoft software or Microsoft software.

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Term	Description
Duration	The total number of days that are needed to complete an activity from start date to end date. Duration is stored as hours and appears as days. Duration exists at both the project and activity level. Duration can be calculated if values are available for the project or activity start and end dates.
Work	The total number of hours spent or to be spent by a resource on an activity. Work does not equal duration. For example, the expected duration of an activity might be five days, but the work that is assigned to the activity might be 80 hours with two resources working on the activity. You define work in hours at the activity level.
Remaining Work	Remaining work, also known as estimate to complete (ETC), can be either automatically calculated or manually entered. When calculated, *(ETC) = (work) – (actual work).*

> **Note**
>
> The *PeopleSoft Integration Architecture for Microsoft Project Integrations* document that is available on Oracle's My Oracle Support website discusses how the PeopleSoft and Microsoft systems exchange data fields and the business logic behind the exchange.

PeopleSoft - Microsoft Project Integrator

When the integration process runs, the Microsoft Project file that is associated with the PeopleSoft project is transferred, through FTP, to a shared directory that is accessible by the Integrator server. The Integrator performs all reading and writing to the Microsoft Project file. When a user requests an integration, data is staged for the Integrator to start. The Integrator checks every 15 seconds for the staged data. If a user attempts an integration while the Integrator is engaged with a previous request, the new request is placed in a queue until an Integrator is available. You can set up more than one Integrator to enable multiple integrations to occur simultaneously.

An Integrator has several states:

- Hold: Indicates that a previously available integrator has been taken offline.
- Waiting: Indicates an idle state.

  The Integrator is ready and waiting for staged data to appear to perform an integration.
- Busy: Indicates that the Integrator is working on a previous integration request.
- Error: Indicates that the last integration has a nonrecoverable error.

  In this case, the Microsoft Project file or the PeopleSoft project is not updated. The messages that are generated by the error are stored with the project. The next time that the Integrator checks for data, the error information that appears at the bottom of the Maintain Project with Microsoft page is cleared and the Integrator continues on to the next integration request.

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The state of the Integrator, warnings, and error messages appear in the Integration Session Log that you can view on the Create Project from Microsoft page.

Copying Data from PeopleSoft Project Costing to Microsoft Project

This topic discusses issues that are related to creating or updating a project in Microsoft Project with data that exists in PeopleSoft Project Costing.

Project Data

When you're creating a project from PeopleSoft software to Microsoft software, project-level data is stored in the Microsoft custom properties to validate future updates. This data includes project origin—PeopleSoft or Microsoft—business unit, project ID, project type, project status, duration, project manager name and employee ID, project manager start and end dates, and project manager effective date.

Activity Data

PeopleSoft activity-level data is synchronized with the Microsoft Project tasks. Activity data copied or updated includes activity ID or task name, activity type, description, start and finish dates, percent complete, duration, summary flag, and milestones. User text type fields are used to store key information for use in future updates. For example, the unique ID that is used for each activity business unit, project ID, and activity ID in the PeopleSoft system is stored in the Microsoft Project Task.Text20, Task.Text21, and Task.Text22 (and alsoText30) fields, respectively, when you are synchronizing activities and tasks. If the value of Text30 is altered or deleted, future updates are inaccurate.

If you use PeopleSoft Program Management, the activity date cascade calculation method that you define in the PeopleSoft system is exported to Microsoft Project based on the mappings in this table:

PeopleSoft Activity Date Cascade Calculation Method Exported to Microsoft	Calculation Method Converted in Microsoft
Manual	Manual
Delay Calculations Until Save	Manual
Realtime Calculations	Automatic

See PeopleSoft Program Management: Establishing PeopleSoft Program Management Business Unit Options.

> **Note**
>
> If the autocalculation option is selected when you export data to the Microsoft system, the dates and duration data that are sent to the Microsoft system may not remain intact. This is due to the many internal calculations that Microsoft Project makes to new or altered data.

Work Breakdown Structure

The WBS ID (work breakdown structure ID) is specified on the PeopleSoft activity definition and is copied to the Microsoft system when you export activity definitions. The WBS ID in the PeopleSoft system and the Microsoft system is a concatenation of the parent outline number

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and activity outline number, and cannot be modified manually. Changes that you make to a project WBS structure are reflected in the Microsoft system during the next integration process.

The PeopleSoft - Microsoft Project Integrator moves tasks by cutting and pasting. Activities that you delete in the PeopleSoft system are not automatically deleted in the Microsoft system.

Dependencies and Constraints

If you use PeopleSoft Program Management and export activity definitions from the PeopleSoft system to the Microsoft system, the integration process copies activity dependencies and constraints. During the export process, the system deletes the existing dependencies in Microsoft Project and creates new dependencies based on the dependency data sent from the PeopleSoft system.

During the export process, the PeopleSoft system also sends activity constraint information such as the deadline date, constraint type, and constraint date.

See PeopleSoft Program Management: Understanding Integration of Dependencies and Constraints with Microsoft Project.

Team Members and Resource Assignments

The contents of the project team list can be copied into the Microsoft Project resource sheet. Resources that are on the project activity team can be assigned in the Microsoft Project resource assignments. If activities and resources are copied to Microsoft Project, the integration process creates Microsoft resource assignments if the assignments in the PeopleSoft project activity team match a task and resource in Microsoft Project.

The resource's cost rate and bill rate are from the Cost Rate field (COST_RATE) and Bill Rate field (BILL_RATE) in the Project Team Member table (PROJECT_TEAM) in PeopleSoft Project Costing if you use PeopleSoft Program Management. If you use PeopleSoft Project Costing without PeopleSoft Program Management, the resource's cost and bill rates are from the Rates by Role table (PC_RATE_ROLE). The resource's cost rate is stored in the Resources.StandardRate field in Microsoft Project. The resource's bill rate is stored in the Resources.Cost1 field. Job codes do not exist in the resource sheet.

You can export the Budget Item field (PC_BUDGET_ITEM) and Project Role field (PLAN_PROJROLE) values from the project level in PeopleSoft Project Costing to the resource sheet in Microsoft Project. The Microsoft Project system stores these values in custom text field Resources.Text10 and Resources.Text9. The project role is exported to Microsoft Project only for labor resources.

If you use PeopleSoft Program Management, values from the **Units** field in the assignment schedule in the Resource Details page copy to the resource sheet in Microsoft Project.

As resources are copied to the resource sheet, the system creates a unique ID and stamps it in the Resource ID field (RES_UID) in the Project Team Member table for future updates. If you remove a team member or delete an assignment, it is not reflected in the Microsoft system.

Transaction Data

Transactions and resource data are sent to the Microsoft system in the following way:

- Actual Cost Rows: Rows in the Project Transaction table that have actual cost analysis types are summarized by activity and copied to Microsoft Project as actual cost values at the task level.

  Resource amount is the summarized field. The Actual Cost (Task.ActualCost) field is updated on the matching task in the Microsoft system.

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- Actual Work Rows: Rows in the Project Transaction table that have actual cost analysis types and an employee ID are summarized by activity and copied to Microsoft Project as actual work values at the task level.

  Resource Quantity is the summarized field. The Work field (Task.Work) is updated on the matching task in the Microsoft system.

Copying Data from Microsoft Project to PeopleSoft Project Costing

This topic discusses issues that are related to creating or updating a project in PeopleSoft Project Costing with data existing in Microsoft Project.

Project Data

When copying a project from Microsoft Project to PeopleSoft Project Costing, you enter the business unit, project ID, project description, integration template, project type, project status, project charging level, and project tree information. These values are used to create the project in the PeopleSoft system.

Task and WBS Data

The Microsoft Project tasks are synchronized with PeopleSoft activity-level data. The integration process imports summary and nonsummary tasks to the PeopleSoft system from the Microsoft system. Updated activity data includes activity ID, activity type and description, start and finish dates, percent complete, duration, summary flag, and milestones. New activities are formatted in the Activities Interface staging table (INTFC_ACT_GEN) with an activity ID of *NEXT,* while existing activities are formatted with the PeopleSoft Project Costing activity ID.

Regardless of the method that you use in the Microsoft system to calculate start and end dates for summary activities, the system assigns a calculation method of *Manual* in the PeopleSoft system for tasks that you import from the Microsoft system.

The **WBS ID** field on the task specifies the placement of activities within the WBS. The **WBS ID** field in Microsoft Project maps to the WBS ID in PeopleSoft Project Costing. The system verifies that the WBS structure for a project in Microsoft Project contains no more than nine levels, which is the maximum number of levels in PeopleSoft software. If a WBS contains more than nine levels, a message appears indicating that you cannot import the WBS into the PeopleSoft system. If the WBS ID in the Microsoft system contains a prefix, such as PC1.1, PC1.2, and so on, the system removes the prefix prior to populating the **WBS ID** field in the PeopleSoft system.

The Load Projects and Activities Application Engine process (PC_INTF_GEN) creates any new activities imported from Microsoft Project and renumbers the WBS ID on existing activities as needed to match the Microsoft Project WBS.

If you use PeopleSoft Program Management, you can select an option on the Microsoft Integration Options page for new projects created from the Microsoft system to copy the Microsoft WBS only up to the project charging level that is specified on the Create Project from Microsoft page in the PeopleSoft system.

See PeopleSoft Program Management: Understanding Project Charging Levels.

Tasks that you delete in Microsoft Project are not automatically deleted in PeopleSoft Project Costing during the integration process. For deleted tasks, the next time that you import Microsoft data to the PeopleSoft system, the system:

- Assigns a WBS level 1 to the deleted tasks.
- Moves the deleted tasks to the end of the project WBS structure.

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- Changes the activity processing status to *Inactive.*

Dependencies and Constraints

If you use PeopleSoft Program Management and import tasks from the Microsoft system to the PeopleSoft system, the integration process copies task dependencies and constraints. During the import process, the system deletes the existing dependencies in the PeopleSoft system and creates new dependencies based on the dependency data received from the Microsoft system.

You must enter dependency lag time in days in Microsoft Project to integrate with the PeopleSoft system. The integration process does not support percentage lag durations or elapsed time.

You cannot import dependencies for summary activities from the Microsoft system to the PeopleSoft system.

See PeopleSoft Program Management: Understanding Integration of Dependencies and Constraints with Microsoft Project.

Team Members and Resource Assignments

When you create a project, all resources and assignments that are on the Microsoft Project resource sheet can populate the Project Team Member table, and resources that are assigned to tasks in Microsoft Project can be moved to the Project Activity Team table. Entries in the **Resource Name** field should be either <*First Name Last Name*>, such as *Tom Jones,* or a resource requirement entry, such as *Java Developer.* The **Resource Name** field value is validated against the employee names that are in the PeopleSoft system, and if a valid name match is located, the appropriate employee is added to the project or activity. If you use PeopleSoft Program Management and no match is found, the resource from the Microsoft system is added as a generic resource in Program Management. If you use PeopleSoft Project Costing without PeopleSoft Program Management and no match is found, the resource is not imported.

The Resource Unique ID from the Microsoft resource (RES_UID) is stored in the Project Team Member table to facilitate future updates to Microsoft Project. The Resource Unique ID and the Task Unique ID (ACT_UID) are stored in the Project Activity Team table to facilitate future updates to Microsoft Project.

The integration process imports the project role values from the resource sheet in Microsoft Project to the project team, activity team, and schedule level in PeopleSoft Program Management. If you use PeopleSoft Project Costing without PeopleSoft Program Management, the system imports the project role from the resource sheet in Microsoft Project to the project team in Project Costing. If the import process updates an existing project, the project role values from Microsoft Project override the existing values in the PeopleSoft system. If no project role exists for the resource in Microsoft Project, or if the project role on the resource sheet is not valid in PeopleSoft Project Costing, the system assigns the default project role that you specify on the Microsoft Integration Options page. The system validates imported project roles against the Project Role table (PROJ_ROLE).

If you use PeopleSoft Program Management and PeopleSoft Resource Management, you can select integration options to:

- Automatically add a named resource with a status of *Requested* if manager approval is required, or *Committed* if manager approval is not required, and generate a PeopleSoft Resource Management assignment if you import a resource from Microsoft Project that exists as a resource in Resource Management.

  If you import a named resource from Microsoft Project that is not an existing resource in PeopleSoft Resource Management, the system adds the resource to the Resources page

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in PeopleSoft Program Management as a generic resource. If you import a named resource from Microsoft Project that is an existing resource in PeopleSoft Resource Management, the Resource Management values for resource pool, region, personnel status, and primary project role populate the Resources page for the resource.

- Automatically add a generic resource with a status of *Requested* and generate a PeopleSoft Resource Management allocation if you import a resource from Microsoft Project that does not exist as a resource in Resource Management.

  If you import a generic resource from Microsoft Project that belongs to a resource group (known as a resource pool in PeopleSoft software) that does not match a resource pool in PeopleSoft Resource Management, the system adds the generic resource with a resource pool value of *Unassigned.* The system imports the Microsoft Project values for resource name and region. The integration process does not re-create PeopleSoft Resource Management assignments or allocations that are already requested if you subsequently import the same project from Microsoft Project.
- If a pending or approved assignment request already exists for the resource, the system updates the assignment schedules only for resources with a status of *Considered.*
- Disregard PeopleSoft Resource Management schedule conflicts and create assignments even if doing so results in overbooking resources.
- Select a default region from which to request generic resources.

When task dates change, all resources and resource assignments are copied to the PeopleSoft system, and a routine is called to adjust the dates, if needed, and to create new entries in the team tables during updates.

If you use PeopleSoft Program Management, values from the Units field in the resource sheet in Microsoft Project copy to the assignment schedule in the Resource Details page.

Resources or assignments that you delete from the Microsoft system are not automatically deleted in the PeopleSoft system during the next import process. Assignments must be manually deleted from the PeopleSoft system.

Transaction Data

The system identifies budget rows in Microsoft Project if a value is in the BaselineCost field at the task level. Each task is examined. If the task is not a summary and its BaselineCost value is not zero, the system copies the row to the budgeting tables if Projects Budgeting is enabled. If Projects Budgeting is disabled, the system copies the row to the Project Transaction table. The PeopleSoft - Microsoft Project Integrator selects the analysis types based on the budget analysis group. Changes to the task BaselineCost can be reflected in future updates.

If Projects Budgeting is enabled, the Microsoft Project budget periods for an activity are unlimited from the project start date. Budget rows for activities with start dates that are outside of this date range are not imported to budgeting tables or the Project Transaction table. The system copies the total amount from the budget periods in the Microsoft system to the start date period in PeopleSoft Project Costing.

The integration process imports the budget items from the resource sheet in Microsoft Project to the project team, activity team, and schedule level in PeopleSoft Program Management. If you use PeopleSoft Project Costing without PeopleSoft Program Management, the system imports the budget item from the resource sheet in Microsoft Project to the project team in Project Costing. If the import process updates an existing project, the budget item values from Microsoft Project override the existing values in the PeopleSoft system. The system validates imported budget items against the Budget Category Control table (GM_BUD_CATEGORY).

If no budget item exists for the row in Microsoft Project, or if the budget item on the resource sheet is not valid in PeopleSoft Project Costing, the system assigns the default budget item

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that you specify on the Microsoft Integration Options page. The system assigns a budget item to budget rows for activities based on the default **Material Budget Item** if either of these conditions exist:

- The task contains at least one material resource row from Microsoft Project.
- The task does not contain any resource rows.

If a task contains only labor resource rows in Microsoft Project, the system assigns a budget item to budget rows for those activities based on the default **Labor Budget Item** that you specify on the Microsoft Integration Options page.

Setting Up Integration Options

Pages Used to Set Up Integration Options

Page Name	Definition Name	Usage
Microsoft Project Page	PC_MSP2_BUDEFS	Establish the default settings for integrating projects for this project business unit with Microsoft Project.
Microsoft Integration Options	PC_MSP2_RUNDEFS	Modify the default integration options that are originally defined at the business unit level on the Microsoft Project page. The Microsoft Integration Options page is similar to the Microsoft Project page; therefore, both pages are discussed in this topic. To access this page, click the **Options** link on the Create Project from Microsoft Page .

Microsoft Project Page

Use the Microsoft Project page (PC_MSP2_BUDEFS) to establish the default settings for integrating projects for a project business unit with Microsoft Project.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Project Costing**, and then **Project Costing Options**, and then **Microsoft Project**

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

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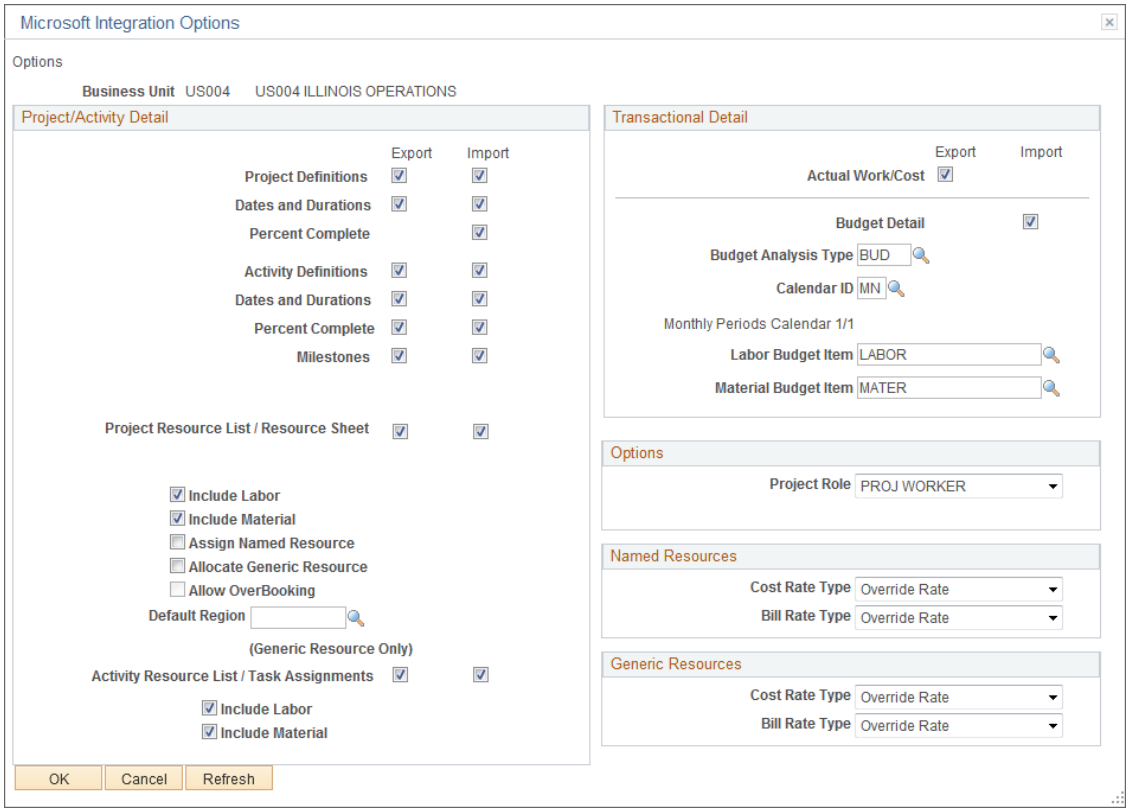

Initially, integration between PeopleSoft Project Costing and Microsoft Project is a matter of establishing integration options at the business unit to eliminate setting them on a project-by-project basis. Integration options that are set at the business unit level, however, can be overridden at the project level.

> **Note**
>
> Many of the fields on both the Microsoft Project and Microsoft Integration Options pages are similar; therefore, the discussion in this topic applies to both pages. The **Business Unit** and **Project** fields at the top of the page designate the level (business unit or project) at which you are defining the integration criteria.

The settings that you enter on the Microsoft Project page for the business unit appear by default on the Microsoft Project Integration page for all projects that belong to the business unit.

Field or Control	Description
Export	Select the check box that corresponds to each data element that you want to send to Microsoft Project when the integration process runs to export data from PeopleSoft Project Costing to the Microsoft system.

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Field or Control	Description
Import	Select the check box that corresponds to each data element that you want to receive in PeopleSoft Project Costing when the integration process runs to import data from the Microsoft system to Project Costing.

Project/Activity Detail

Field or Control	Description
Project Definitions	Select to copy information such as project name, project ID, description, type, business unit, manager ID, project tree name, tree effective date, and parent node if applicable.
Dates and Duration	Select to copy the project start and end dates. This option also copies project duration if you use PeopleSoft Program Management.
Percent Complete (project)	Select to import the percent complete value from Microsoft Project to PeopleSoft if the calculation method is manual.
Activity Definitions	Select to copy information such as activity ID or task name, activity type, description, summary flag, and work breakdown structure ID (WBS ID). If you use PeopleSoft Program Management, the integration process copies activity dependencies and constraints when you export data from the PeopleSoft system to the Microsoft system.
Dates and Duration	Select to copy the activity start and end dates. This option also copies activity duration if you use PeopleSoft Program Management.
Percent Complete (activity)	Select to copy the percent complete value that appears on the Activity Definitions - General Information page for each activity or task. If the transmission is from PeopleSoft Project Costing to the Microsoft system, the value sent is the percent complete based on the calculation method that is defined for the project business unit. When the percent complete arrives in the Microsoft system, it triggers a recalculation of actual work in the Microsoft system, which automatically updates actual work based on percent complete as part of its standard functionality. When PeopleSoft Project Costing receives the percent complete from Microsoft Project, only the percent complete value that is in the PeopleSoft system changes. Actual work does not change.
Milestones	Select to synchronize milestones. In the PeopleSoft system, you designate an activity as a milestone on the Activity Definitions - Definition page.

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Field or Control	Description
Include only costing level WBS (include only costing level work breakdown structure)	Select **Import** to copy the Microsoft WBS only down to the project charging level that is specified on the Create Project from Microsoft page in the PeopleSoft system. Deselect the **Import** check box to import the entire WBS to the PeopleSoft system. This option is available for new projects that you create from the Microsoft system. **Note:** If you select the **Include only costing level WBS** option and import the WBS only down to the specified activity costing level, Oracle recommends that you not export the WBS back into Microsoft Project from the PeopleSoft system because the WBS structures now differ. This option appears if you select an activity costing level as the project charging option on the Create Project from Microsoft page. The **Include only costing level WBS** option is available for the project if you use PeopleSoft Program Management. See PeopleSoft Program Management: Understanding Project Charging Levels.
Project Team	This field appears only if you use PeopleSoft Project Costing without PeopleSoft Program Management. If PeopleSoft Program Management is installed, this field is replaced with the **Project Resource List** and **Resource Sheet** fields. *Export:* Select to copy members of the project team to the Microsoft Project resource sheet. *Import:* Select to copy labor resources from the Microsoft Project resource sheet to the Project Team Member Team table.
Job Codes	Select *Export* to copy all of the resources that belong to the job codes that are specified on the Project Definitions - Team page in PeopleSoft Project Costing to the Microsoft system. This field appears only if you use PeopleSoft Project Costing without PeopleSoft Program Management.
Project Resource List / Resource Sheet	Select to copy project-level data such as description, project type, start and end dates, and so on. This field appears only if you use PeopleSoft Program Management. *Export:* Select to copy data from the project resource list on the Resources page in PeopleSoft Program Management to the Microsoft Project resource sheet. *Import:* Select to copy resource data from the Microsoft Project resource sheet to the project resource list on the Resources page in PeopleSoft Program Management.

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Field or Control	Description
Include Labor	Select to copy labor resources for the project. This field appears only if you use PeopleSoft Program Management.
Include Material	Select to copy material and asset resources, such as consumable supplies and machinery, for the project. Material and asset resources do not have time or work components associated with them. This option appears only if you use PeopleSoft Program Management.
Assign Named Resource	Select to add the resource with a status of *Requested,* which triggers the process to create a PeopleSoft Resource Management assignment. Deselect the check box to add the resource with a status of *Considered.* This check box appears only if you use PeopleSoft Program Management and PeopleSoft Resource Management.
Allocate Generic Resource	Select to add the resource with a status of *Requested,* which triggers the process to create a PeopleSoft Resource Management allocation. Deselect the check box to add the resource with a status of *Considered.* This check box appears only if you use Program Management and PeopleSoft Resource Management.
Allow Overbooking	Select to assign a resource status of *Requested* when you import named resources from Microsoft Project, and when you create PeopleSoft Resource Management assignments regardless of schedule conflicts. Deselect the check box to assign a resource status of *Considered* on the PeopleSoft Program Management Resources page if resource schedule conflicts exist. This option applies only if you select the **Auto Assign Named Resource** option. This option appears only if you use PeopleSoft Program Management and PeopleSoft Resource Management.
Default Region	Select a default region from which to request generic resources. The default region populates the **Region Code** field on the PeopleSoft Program Management Resources page for new resources. This value does not update the region for existing resources. This option applies only to generic resources that you import from Microsoft Project. This option appears only if you use PeopleSoft Program Management and PeopleSoft Resource Management.

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Field or Control	Description
Activity Resource List / Task Assignments	Select to copy activity-level data such as task name or activity ID, activity type, description, start and end dates, and resources. This option appears only if you use PeopleSoft Program Management. *Export:* Select to copy resource data from the PeopleSoft Program Management Resources by Activity page to the Microsoft task assignments. *Import:* Select to copy resource data from the Microsoft Project tasks to the PeopleSoft Program Management Resources by Activity page.
Include Labor	Select to copy labor resources and their related work information for activities. This option is available for selection only if you select the **Include Labor** option for the **Project Resource List / Resource Sheet.**
Include Material	Select to copy the material and asset resources for activities. This option is available for selection only if you select the **Include Material** option for the **Project Resource List / Resource Sheet.**

Transactional Detail

Field or Control	Description
Actual Work/Cost	Select **Export** to summarize transaction rows that belong to the actuals analysis group that are in the Project Transaction table, and copy the data to the Microsoft Project Task, Actual Work, and Actual Cost columns.
Budget Detail	Select **Import** to import nonsummary BaselineCost values from tasks and send them to either the Project Budget Detail table (PC_BUD_DETAIL), if the Projects Budgeting feature is enabled, or the Project Transaction table by using the analysis type that you enter in the **Budget Analysis Type** field. When you import budget transactions from the Microsoft system, the system creates a new budget plan by using the values that you define in the next five fields.
Budget Analysis Type	Enter the analysis type to assign to budget transactions that are coming into the PeopleSoft system from the Microsoft system.
Calendar ID	Enter the general ledger (GL) calendar that the system uses to determine standard business hours per day, days per week, and holidays. The calendar ID identifies the interval at which the budget is tracked.

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Field or Control	Description
Labor Budget Item	Enter the value to use as the default budget item that appears in PeopleSoft Project Costing for rows with a **Resource Class** value of *Labor* that you import from Microsoft Project if a budget item value does not exist in Microsoft Project. The system also assigns the default value to imported rows that contain budget items that do not exist in the Budget Category Control table. During the import process, budget items in Microsoft Project override the default budget item on this page. This field is required if you select the **Include Labor** option for the **Project Resource List** / **Resource Sheet** or **Activity Resource List** / **Task Assignments** on the Microsoft Integration Options page. If you use PeopleSoft Program Management, this value appears as the budget item for labor resources on the Resources page and Resources by Activity page.
Material Budget Item	Enter the value to use as the default budget item that appears in PeopleSoft Project Costing for rows with a **Resource Class** value of *Material* that you import from Microsoft Project if a budget item value does not exist in Microsoft Project. The system also assigns the default value to imported rows that contain budget items that do not exist in the Budget Category Control table. During the import process, budget items in Microsoft Project override the default budget item on this page. This field is required if you select the **Include Material** option for the **Project Resource List** / **Resource Sheet** or **Activity Resource List** / **Task Assignments** on the Microsoft Integration Options page.

Options

Field or Control	Description
Project Role	Enter the value to use as the default project role that appears in PeopleSoft Project Costing for labor rows that you import from Microsoft Project if a project role value does not exist for the rows in Microsoft Project. The system also assigns the default value to imported rows that contain project roles that do not exist in the Project Role table. During the import process, project roles in Microsoft Project override the default project role on this page.

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Named Resources

This group box appears only if you use PeopleSoft Program Management.

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Field or Control	Description
Cost Rate Type	Select an option to appear as the cost rate type for named labor resources on the Resources page or the Resources by Activity page in PeopleSoft Program Management when you import new resources from Microsoft Project. This field is required if you select the **Include Labor** option for the **Project Resource List** / **Resource Sheet** or **Activity Resource List** / **Task Assignments.** Available options are: *Employee Rate:* The system uses the cost rates that are defined on the Rates by Employee page for new resources that you import from Microsoft Project. Subsequent modifications that you make to resource cost rates in Microsoft Project are not imported into the PeopleSoft system. *Jobcode Rate:* The system uses the cost rates that are defined on the Rates by Job Code page for new resources that you import from Microsoft Project. Subsequent modifications that you make to resource cost rates in Microsoft Project are not imported into the PeopleSoft system. *Project Role Rate:* The system uses the cost rates that are defined on the Rates by Role page for new resources that you import from Microsoft Project. Subsequent modifications that you make to resource cost rates in Microsoft Project are not imported into the PeopleSoft system. *Override Rate:* If you import a new resource from Microsoft Project, the system populates the Resources and Resources by Activity pages with the Resources.StandardRate field value from the Microsoft Project resource sheet. If the resource exists on the Resources page and has a override rate type, the system updates the rate with the Resources.StandardRate field value from the resource sheet. When you export resources from the PeopleSoft system to Microsoft Project, the system sends the activity resource cost rates that appear on the Resources by Activity page. If no cost rate is defined for a named labor resource on the Resources by Activity page, the system uses the resource's cost rate from the Resources page for the project. Rates that you modify in Microsoft Project do not update PeopleSoft data if the existing resource on the Resources page does not have a override rate type. You can control the available options by restricting rate types on the Program Management Options page for the business unit.

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Field or Control	Description
	See PeopleSoft Program Management: Establishing PeopleSoft Program Management Business Unit Options. **Note:** New material resources are brought into the PeopleSoft Program Management Resources page and Resources by Activity page from the Microsoft system with a rate type of *User Defined Rate* (override).
Bill Rate Type	Select an option to appear as the bill rate type for named labor resources on the Resources page or the Resources by Activity page in PeopleSoft Program Management when you import new resources from Microsoft Project. This field is required if you select the **Include Labor** option for the **Project Resource List** / **Resource Sheet** or **Activity Resource List** / **Task Assignments.** These options act in a similar manner as the **Cost Rate Type** options for named resources, except that the system uses the bill rate types—not the cost rate types—that are defined for the selected option. Bill rate types are stored in the Resources.Cost1 field in the Microsoft system.

Generic Resources

This group box appears only if you use PeopleSoft Program Management. These options act in a similar manner as the **Cost Rate Type** and **Bill Rate Type** options for named resources.

Creating Microsoft Projects from PeopleSoft Projects

Pages Used to Create Microsoft Projects from PeopleSoft Projects

Page Name	Definition Name	Usage
Integrate with Microsoft Project Page	PC_MSP2_UPDATEPROJ	Create or update a project in Microsoft Project from data existing in a PeopleSoft Project Costing or PeopleSoft Program Management project.
Administer Integrators	PC_MSP2_VIEWINTG	View the status of integration requests.

Integrate with Microsoft Project Page

Use the Integrate with Microsoft Project page (PC_MSP2_UPDATEPROJ) to create or update a project in Microsoft Project from data existing in a PeopleSoft Project Costing or PeopleSoft Program Management project.

Navigation:

- **Project Costing**, and then **Third Party Integration**, and then **Microsoft**, and then **Third Party Integrate MS Proj**, and then **Integrate with Microsoft Project**

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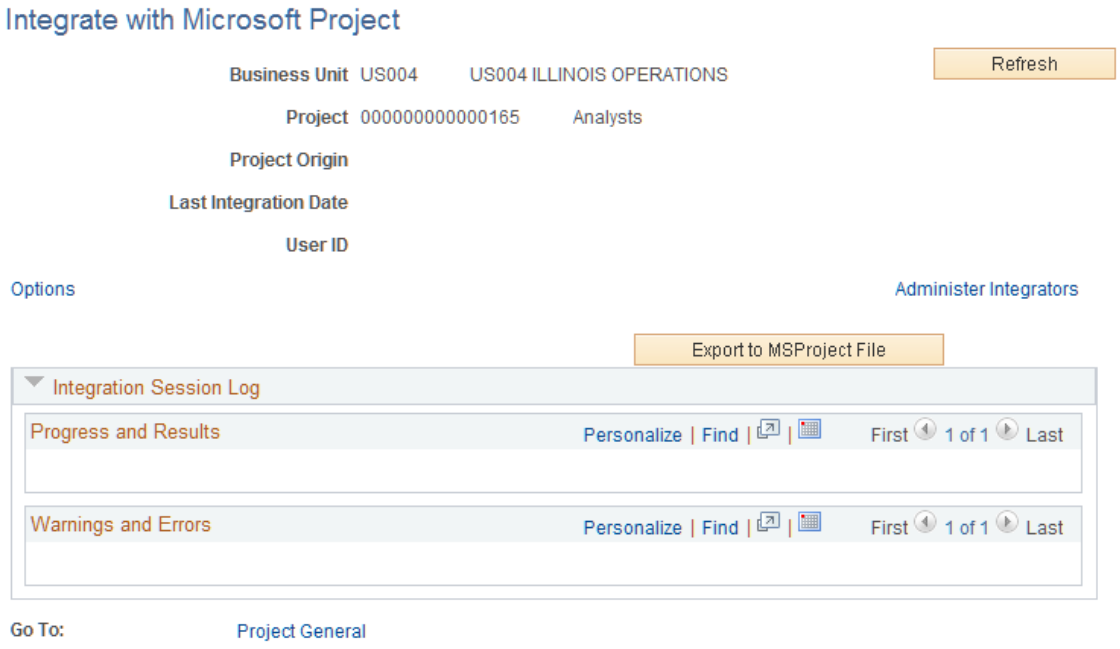
- **Project Costing**, and then **Project Definitions**, and then **Define Project General Info**. Select *Integrate with MSProject* from the **More** drop-down list box on the Project Definitions - General Information page.
- **Program Management**, and then **Third Party Integration**, and then **Microsoft**, and then **Integrate Project**, and then **Integrate with Microsoft Project**
- **Program Management**, and then **Project Definitions**, and then **Define Project General Info**. Select *Integrate with MSProject* from the **More** drop-down list box on the Project Definitions - General Information page.

This example illustrates the fields and controls on the Integrate with Microsoft Project page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Refresh	Click to update information about the progress of the current integration.
Administer Integrators	Click to access the Administer Integrators page to view the integrators that are updating the integration requests and the status of integrations. This button appears only if you have security access to the Administer Integrators page.
Options	Click to access the Microsoft Integration Options page to enter integration criteria for this project.

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Field or Control	Description
Attached File	Click a file name link to download a Microsoft Project *.mpp file that is associated with the PeopleSoft project. To modify the attachment version that is stored in the PeopleSoft system: 1. Modify the file and save the changes. 2. Click **Import from MSProject File** to run the Microsoft Project file through the Integrator. **Note:** To indicate to other users that you are working on the current version of an mpp file, click the **Check Out MSProject File** button.
Check In MSProject File and **Check Out MSProject File**	Click the appropriate button to check in or check out the Microsoft Project *.mpp file that is associated with the project. If a file is checked out, you can edit it and check it back in when you are done, or cancel the checkout. If you edit and check in the file, the changes you have made are saved to the version of the file that is posted. The data changes, however, are not uploaded to the PeopleSoft application tables until you perform the integration process on the file. Any user with access to this page can check out a file. When a file is checked out, only the user who checked out that version of the file can edit it. The Check Out process is primarily intended to facilitate coordination of efforts and ensure that two people do not accidentally overwrite each other's work.
Export to MSProject File	Click to create a new Microsoft Project *.mpp file that contains the changes that are made in the PeopleSoft system. The affected project attributes are those for which the **Export** option is selected on the Microsoft Project page for the business unit. Click **Options** to access the Microsoft Integration Options page and override the business unit options.
Import from MSProject File	Click to update the project in the PeopleSoft system with changes that are made in a Microsoft Project *.mpp file. The affected project attributes are those for which the **Import** option is selected on the Microsoft Project page for the business unit. Click **Options** to access the Microsoft Integration Options page and override the business unit options.
Project General	Click to access the Project Definitions - General Information page for the project.

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Integration Session Log

Field or Control	Description
Progress and Results	Displays the progress and results of the current or last data integration between the PeopleSoft and Microsoft systems.
Warnings and Errors	Displays messages of errors, if any, that occur during the integration process. **Note:** If the integration finishes and adds a new file to the grid, but warnings and error messages appear, you should review the messages and review the project for accuracy. In these circumstances, the majority of the integration is most likely successful, but a value in a particular field may be truncated or not integrated due to unusual data or characters in the Microsoft Project file.

Creating PeopleSoft Projects from Microsoft Projects

Pages Used to Create PeopleSoft Projects from Microsoft Projects

Page Name	Definition Name	Usage
Create Project from Microsoft Page	PC_MSP2_CREATEPROJ	Create a new project in the PeopleSoft system from an existing Microsoft Project project (*.mpp file).
Integrate with Microsoft Project Page	PC_MSP2_UPDATEPROJ	Update an existing PeopleSoft project with data from the Microsoft system.

Create Project from Microsoft Page

Use the Create Project from Microsoft page (PC_MSP2_CREATEPROJ) to create a new project in the PeopleSoft system from an existing Microsoft Project project (*mpp file).

Navigation:

- **Project Costing**, and then **Third Party Integration**, and then **Microsoft**, and then **Add Proj 3rd Party Integration**
- **Project Costing**, and then **My Projects**. Click the **Create Project from Microsoft** link on the My Projects page.
- **Program Management**, and then **Third Party Integration**, and then **Microsoft**, and then **Create Project**, and then **Create Project from Microsoft**

This example illustrates the fields and controls on the Create Project from Microsoft page. You can find definitions for the fields and controls later on this page.

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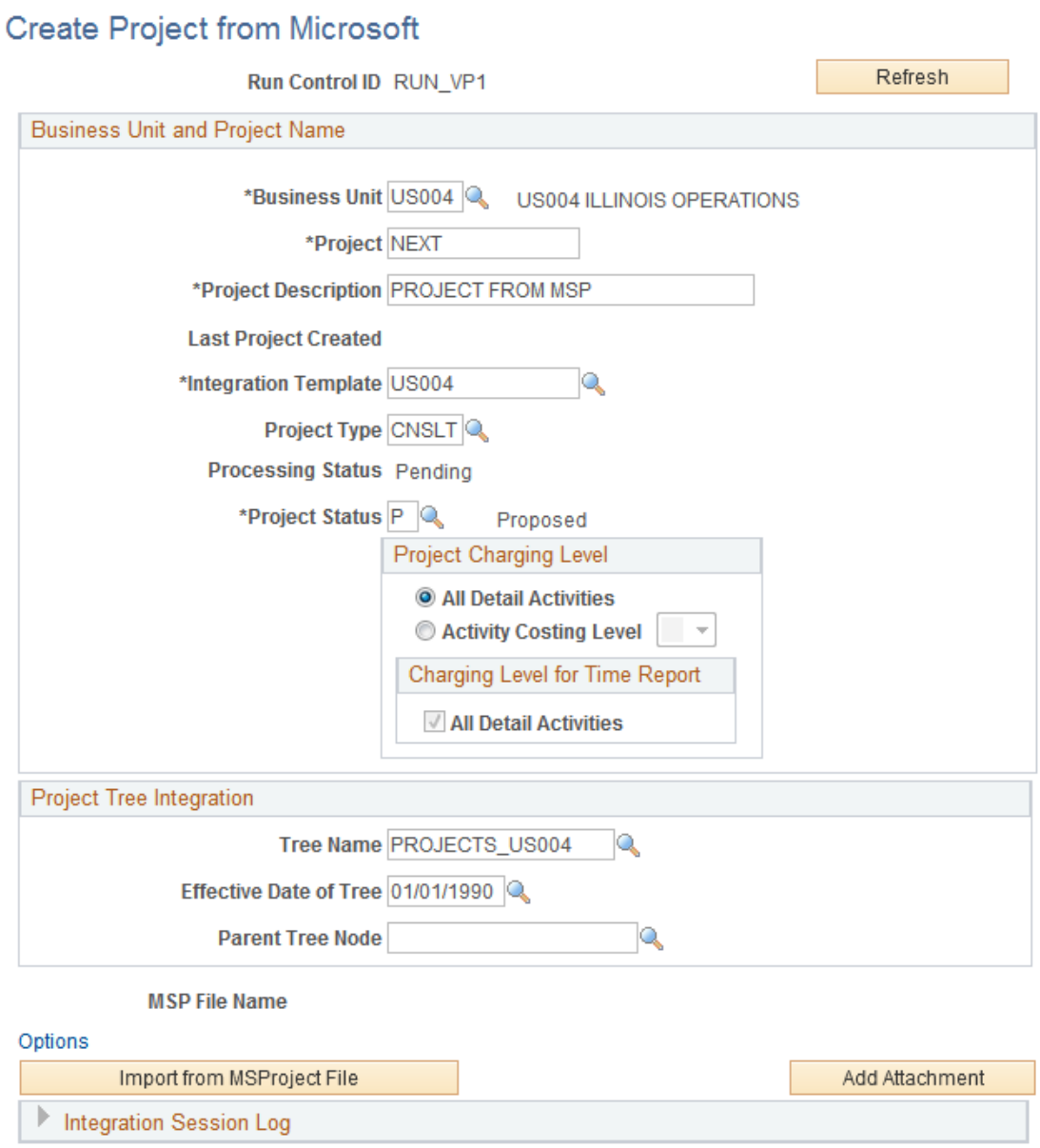

A message appears at the top of the page if errors or warnings occurred in the previous integration process.

Business Unit and Project Name

Enter the PeopleSoft project business unit, project, and project description for the project that you are creating in the PeopleSoft system. The business unit appears by default from the User Preferences - Project Costing page for the person who is logged into the system. The integration options appear by default from the Project Costing Options - Microsoft Project page for the business unit.

Field or Control	Description
Last Project Created	Displays the project ID of the last imported project.

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Field or Control	Description
Integration Template	Select the integration template to use for integrating data for this project with PeopleSoft General Ledger, Asset Management, and Purchasing, if applicable.
Project Type	Enter the project type for the system to assign to this project.
Processing Status	Displays the processing status that the system uses to control incoming transactions. The system assigns the **Processing Status** field value based on the **Project Status** field value that you select. Processing status types are mapped to the delivered and user-defined project status types during implementation. These processing statuses may appear: • *Active:* Projects with an active status can be selected from prompt lists that are in PeopleSoft feeder systems, enabling you to charge transactions from feeder systems to a project. • *Inactive:* Projects with an inactive status do not appear in prompt lists that are in PeopleSoft feeder systems. • *Pending:* Indicates projects that are not active yet, but for which you want to begin project planning such as creating budgets and project teams. You cannot charge cost transactions to pending projects. See Understanding Project-Related Control Data.
Project Status	Select the project status to assign to this project in the PeopleSoft system.

Project Charging Level

This group box defines the charging level for new projects that are created from the Microsoft system. The default values are based on the project charging level settings for the business unit. The group box appears if you use PeopleSoft Program Management.

Field or Control	Description
All Detail Activities	Select to import the entire WBS that includes all tasks.
Activity Costing Level	Select to import a partial WBS that includes only tasks up to the activity costing level. If you select this option, you must select an activity costing level of *1*, *2*, or *3* from the drop-down list box. To use this option, you must also select the **Import** option for the **Activity Definitions** field and the **Include only costing level WBS** field on the Microsoft Integration Options page.

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Field or Control	Description
Charging Level for Time Report	Select the charging level for time reports that appears as the selected option for new projects that are created in the Microsoft system. If you select **All Detail Activities** as the project charging level, the system automatically selects **All Detail Activities** as the time report charging level. This option is available if you use PeopleSoft Expenses and PeopleSoft Program Management.

See PeopleSoft Program Management: Understanding Project Charging Levels.

Project Tree Integration

Field or Control	Description
Tree Name	Select the project tree to which the project belongs.
Effective Date of Tree	Enter the date that the project is considered added to the tree.
Parent Tree Node	Select the parent tree node to which to assign the new project as its child.

Additional Fields

Field or Control	Description
MSP File Name	Displays the name of an existing Microsoft Project *.mpp file to be used to create the project in the PeopleSoft system.
Add Attachment	Click to add an existing Microsoft Project *.mpp file to be used to create the project in the PeopleSoft system.
Options	Click to access the Microsoft Integration Options page to modify the integration default settings.
Import from MSProject File	Click to create the project in PeopleSoft Project Costing with the Microsoft Project *.mpp file. The affected project attributes are those for which the **Import** check box is selected on the Microsoft Project page for the business unit. Click **Options** to access the **Microsoft Integration Options** page and override the business unit options.
Integration Session Log	Click to view warnings, errors, progress, and results of the integration session.
Project General	Click to access the Project Definitions - General Information page for the project just created.

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Using the Projects WorkCenter and Dashboard

Understanding the Project Costing WorkCenter and Dashboard

The Project Costing WorkCenter is a central navigational component that is designed for the end user. The goal of the WorkCenter is to help an end user become more efficient by accessing frequently used pages and pagelets, and by keeping multiple windows open while performing daily tasks.

The Project Costing WorkCenter is delivered with sample data. It is the responsibility of the system administrator from your organization to design and create links so that users can view and access specific links, pages, and pagelets.

> **Note**
>
> The data in the Projects WorkCenter is created from the list of My Projects for the user. Therefore all exception, pivot grid, and query data is associated with the data in the My Projects list for the user.

> **Note**
>
> The PeopleSoft Classic Projects WorkCenter is no longer supported as of FSCM Update Image 9.2.042. However, a fluid version of the Projects WorkCenter is available. See Understanding the PeopleSoft Fluid Projects WorkCenter.

For information about setting up PeopleTools options for the WorkCenter, see *PeopleTools: Global Technology*, Application Fundamentals: Understanding Delivered WorkCenters and Dashboards.

Example: Project Costing WorkCenter

This example illustrates how the Project Costing WorkCenter can be set up:

This example illustrates the fields and controls on the Projects WorkCenter and Dashboard.

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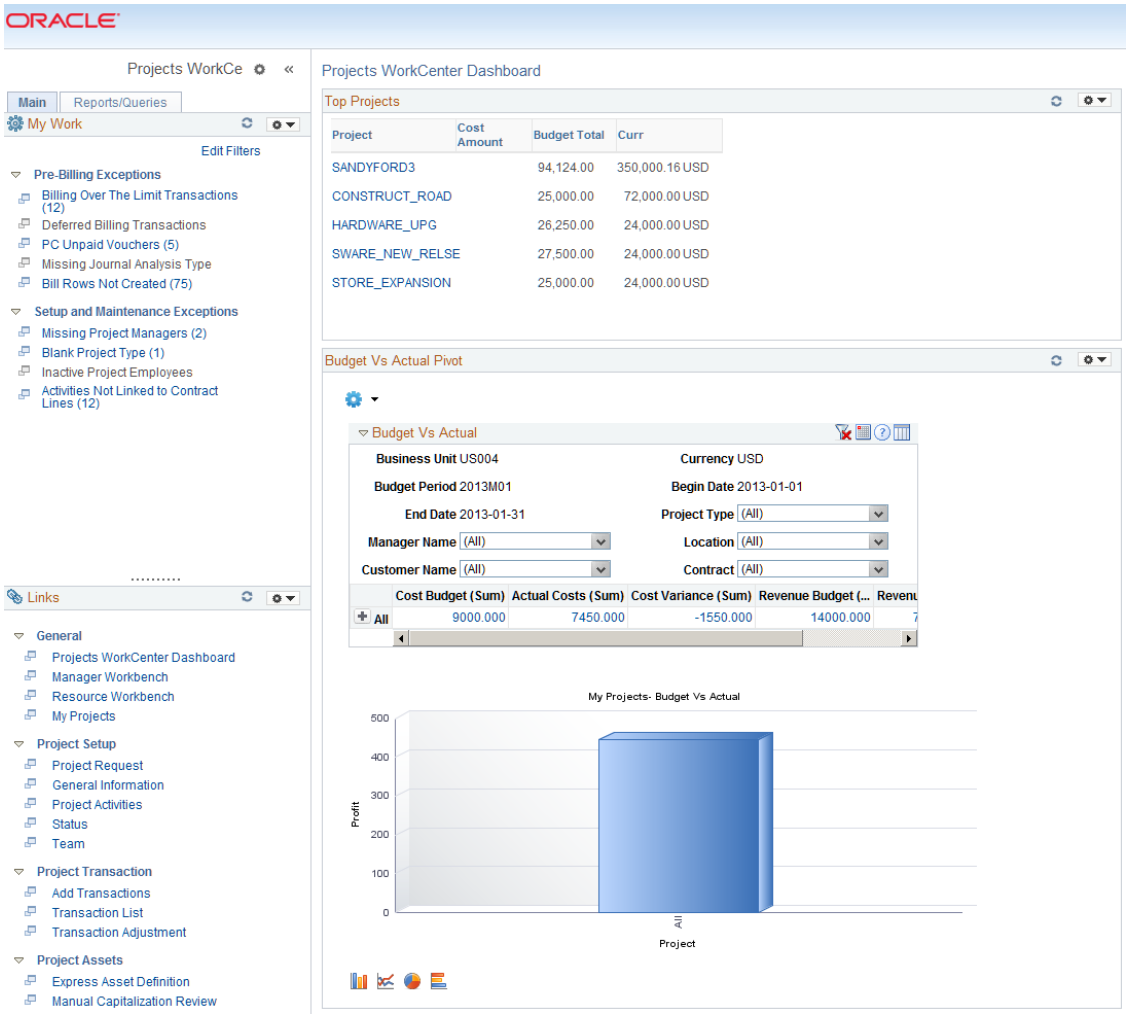

The right side of the page has been configured as a Dashboard and displays specific pagelets that provide the user with specific information as soon as they access the WorkCenter

To review more information about the links that appear in each pagelet, see Understanding the Projects WorkCenter - My Work, Understanding the Projects WorkCenter - Links, Understanding the Projects WorkCenter - Queries, Understanding the Projects WorkCenter - Reports and Processes

Related Topics

- Enterprise Components: Configuring Pagelets
- Enterprise Components: Configuring Filter Definitions and Values

Understanding Dashboards and Pagelets

For more information about setting up dashboards, see Enterprise Components: Configuring Pagelets, Application Fundamentals: Understanding Delivered WorkCenters and Dashboards

Understanding the Projects WorkCenter - My Work

This page shot provides an example of how the Project Costing WorkCenter - My Work section can be set up

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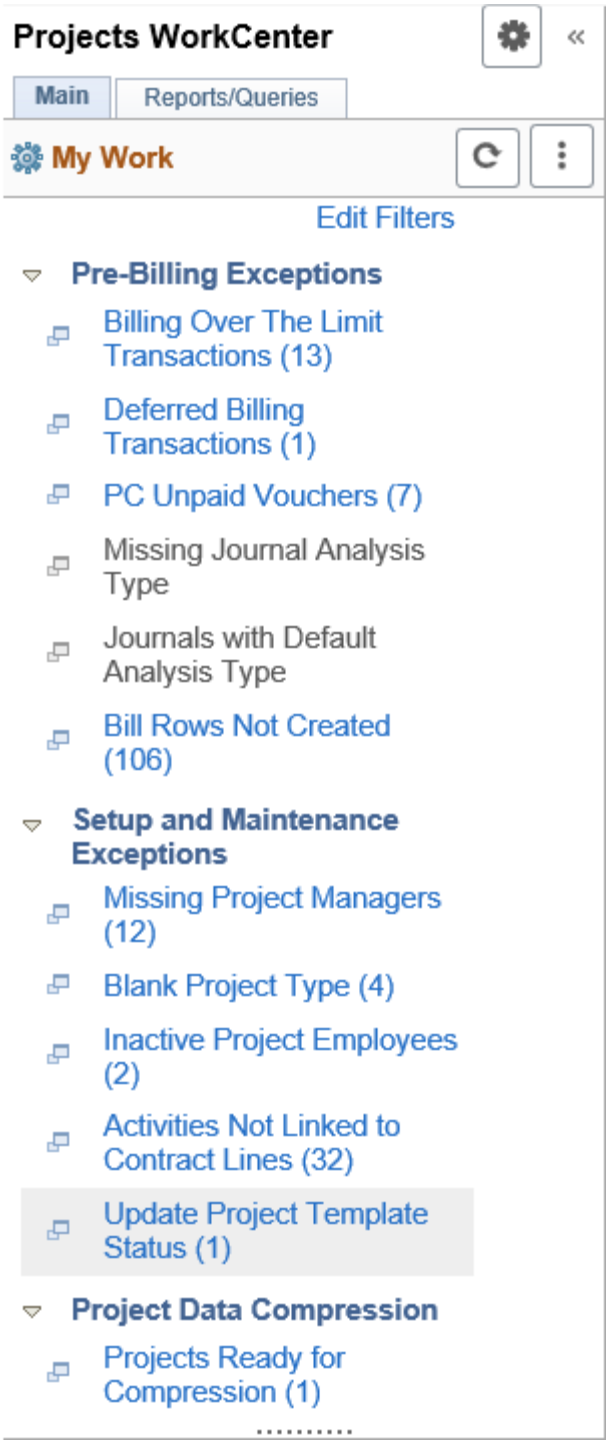
This example illustrates the fields and controls on the My Work. You can find definitions for the fields and controls later on this page.



In this example, the My Work section is divided into these groupings:

- Pre-Billing Exceptions Group
  - Billing Over the Limit Transactions
  - Deferred Billing Transactions

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  - PC (Project Costing) Unpaid Vouchers
  - Missing Journal Analysis Type
  - Journals with Default Analysis Type
  - Bill Rows Not Created
- Setup and Maintenance Exceptions
  - Missing Project Managers
  - Blank Project Type
  - Inactive Project Exceptions
  - Activities Not Linked to Contract Lines
  - Update Project Template Status
- Project Data Compression

Common Elements Used on the Projects WorkCenter - My Work Pagelet

This topic provides common elements used for:

- Action options.
- Page options.

Action Options

Users can select a project and perform these actions:

Field or Control	Description
Manager Transaction Review	Select to access the Manager Transaction Review page for the project. This option is available in Bill Rows Not Created.
Mark Journal Unpost	Select to unpost the journal. This option is available in Missing Journal Analysis Type.
Review Bill Plan Information	Select to access the Billing Plan General page for the contract.
Review Contract Header	Select to Contract - General page.
Review Contract Terms	Select to access the Review Contract Terms page for a selected contract, project, and activity. This page enables a user to attach a project or activity to a contract line.
Review Contract Workbench	Select to access the Contracts Workbench page for the contract to which the project is assigned.
Review Journal Lines	Select to access journal related information. This option is available in Missing Journal Analysis Type.
Review Project Information	Select to access the Project Definitions - General Information page.
Review Project Transactions Pivot	Select to access the Project Transactions Pivot page. The page enables a user to review project transaction data from the project summary tables.

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Field or Control	Description
Review Rate set / Rate Plan	Select to access the rate set or the rate plan that is associated to the project. This option is available in Bill Rows Not Created.
Review Resource Details	Select to access the Project Resource Plan page (if PeopleSoft Program Management is installed), or the Project Team page (if PeopleSoft Program Management is not installed).
Review Transaction List	Select to access the Transaction List page for the project and activity.
Review Voucher Information	Select to access voucher related information. This option is available in PC Unpaid Voucher.

Page Options

These fields and definitions are common in the Projects WorkCenter - My Work Pagelet

Field or Control	Description
Run Pricing	Click to open the Pricing run control page.
Process Monitor	Click to access the Process Monitor. Users can view the status of a job that was submitted.
Refine Filter Criteria	Application Fundamentals: Understanding Delivered WorkCenters and Dashboards

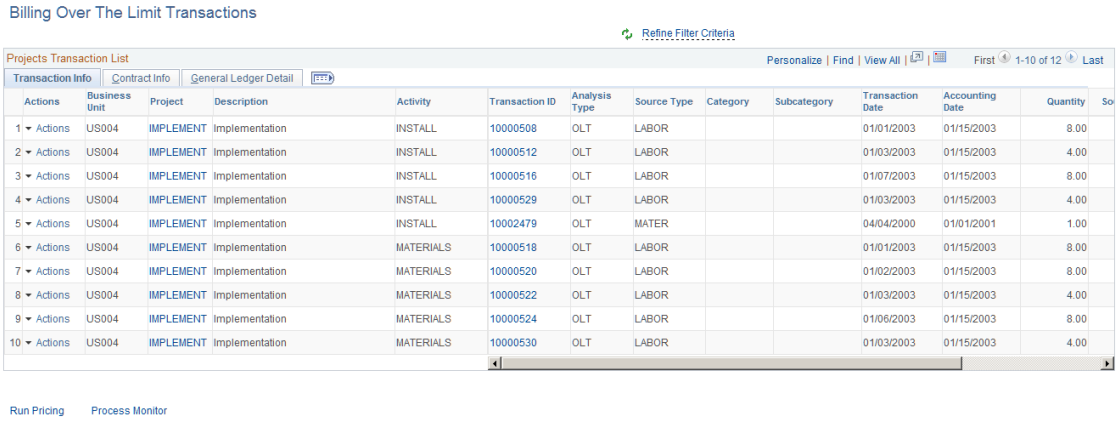
Pre-Billing Exceptions

This group contains these exceptions:

Billing Over the Limit Transactions

Use the Billing Over the Limit Transactions pagelet (PC_APP_WC_GRID) to view all transactions whose analysis type is OLT (over the limit transaction) for all active projects. If a user increases the billing limit on the contracts page, then they can perform limit checking for each row.

This example illustrates the fields and controls on the Billing Over the Limit Transactions.



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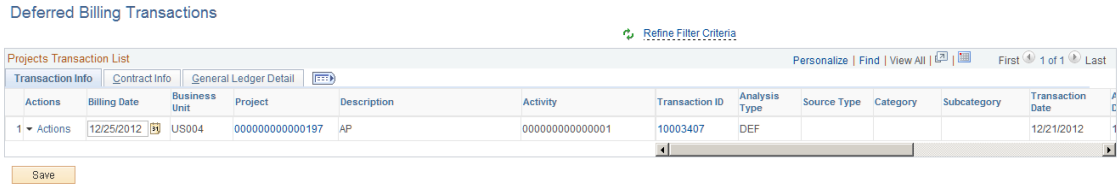
Deferred Billing Transactions

Use the Deferred Billing Transactions pagelet (PC_APP_WC_GRID) to view all transactions whose analysis type is DEF (deferred billing) for all active projects and can change the billing date.

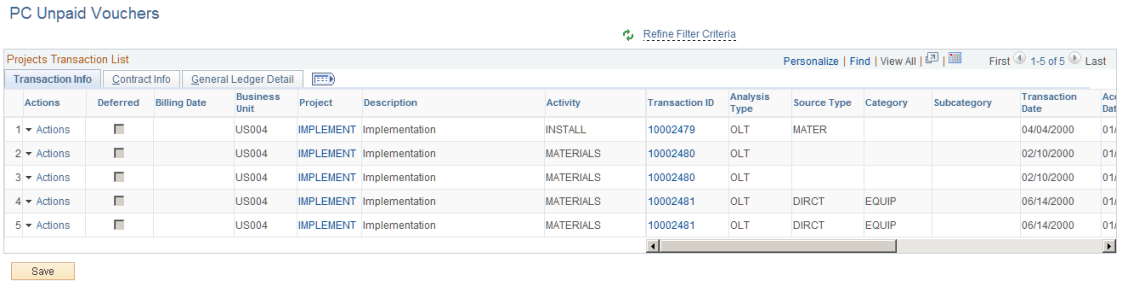
This example illustrates the fields and controls on the Deferred Billing Transactions pagelet .



PC Unpaid Vouchers

Use the PC Unpaid Vouchers pagelet (PC_APP_WC_GRID) to view transactions for active projects that have a voucher ID, but the voucher is not paid.

This example illustrates the fields and controls on the PC Unpaid Vouchers page.

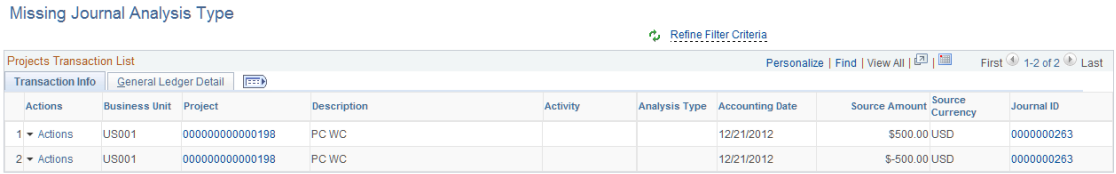


Users can select an action to defer a particular transaction and give a different billing date, which behaves the same way as the Manager Transaction Review page. After a user defers a specific row, the analysis type is changed to DEF and will appear in the Deferred Billing Transactions exception.

Missing Journal Analysis Type

Use the Missing Journal Analysis Type pagelet ((PC_APP_WC_GRID) to view General Ledger journals that have been posted and contain active project IDs that are missing an analysis type.

This example illustrates the fields and controls on the Missing Journal Analysis Type pagelet.



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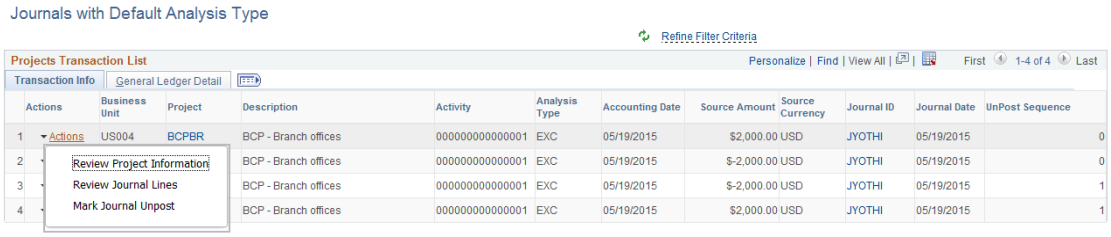
Journals with Default Analysis Type

Use the Journals with Default Analysis Type pagelet (PC_APP_WC_GRID) to view all journal lines with the Default Analysis Type. The Default Analysis Type will be assigned to journal lines when there is no matching mapping rule found on the Assign General Ledger Analysis Types page.

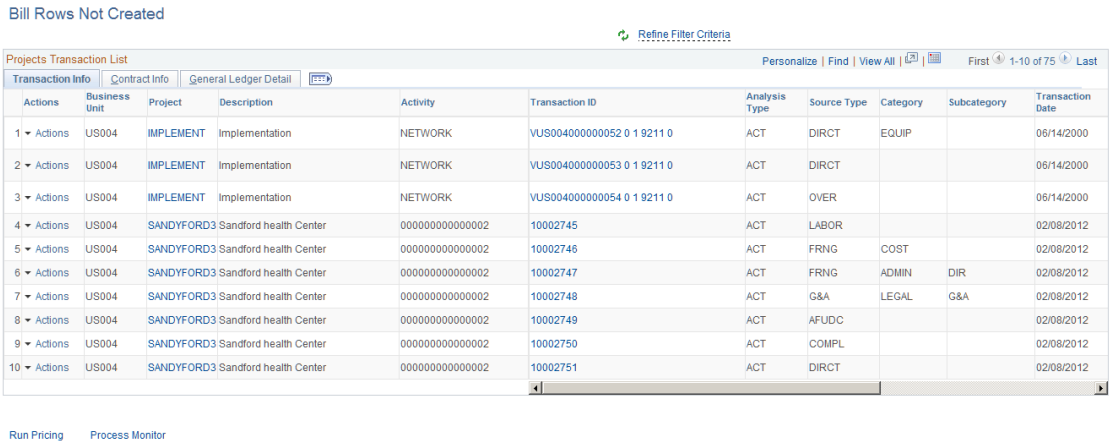
This example illustrates the fields and controls on the Journals with Default Analysis Type pagelet. You can find definitions for the fields and controls later on this page.



Bill Rows Not Created

Use the Bill Rows Not Created pagelet ((PC_APP_WC_GRID) to view Bill Rows Not Created, which are all transactions for active projects whose analysis type falls under Actual Cost Analysis Group. If a user provides the missing information that caused the BIL row to not be generated, the exception will be cleared after the Pricing process is run.

This example illustrates the fields and controls on the Bill Rows Not Created page.



Setup and Maintenance Exceptions

This group contains these exceptions:

Missing Project Managers

Use the Missing Project Managers pagelet (PC_WC_TEAM_GRID) to view all active projects that do not have an active project manager as of the current date. A link is provided in the Resource Name column that enables the user to access the Resource Detail page or the Project Team page if Program Management is installed.

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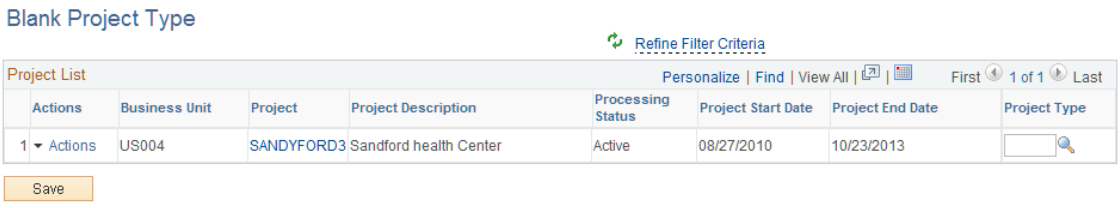
This example illustrates the fields and controls on the Missing Project Managers.

Blank Project Type

Use the Blank Project Type pagelet (PC_WC_TEAM_GRID) to view active projects for which the project type is not assigned a value. The user can select a value from the Project Type drop down box. If a user selects a valid project type and clicks the Save button, then the exception is cleared from the gird.

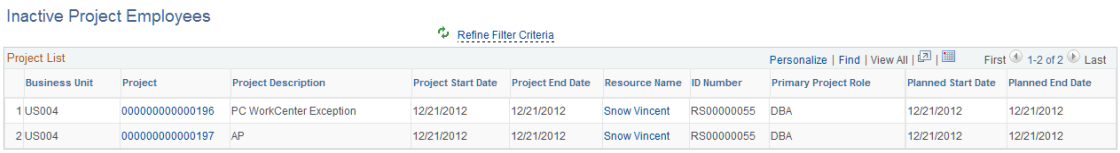
This example illustrates the fields and controls on the Blank Project Type page.



Inactive Project Employees

Use the Inactive Project Employees pagelet to view active projects that have inactive employees as of the current date. The user can perform the necessary action. A link is provided in the Resource Name column that enables the user to access the Resource Detail page (if Program Management is installed) or the Project Team page (if Program Management is not installed). If the resource is a manager for the current date, then a manager icon is visible on the grid.

This example illustrates the fields and controls on the Inactive Project Employees pagelet.



Activities Not Linked to Contract Lines

Use the Activities Not Linked to Contract Lines pagelet (PC_WC_TEAM_GRID) to view active projects and activities that have not been assigned to a rate based contract line.

This example illustrates the fields and controls on the Activities Not Linked to Contract Lines page.

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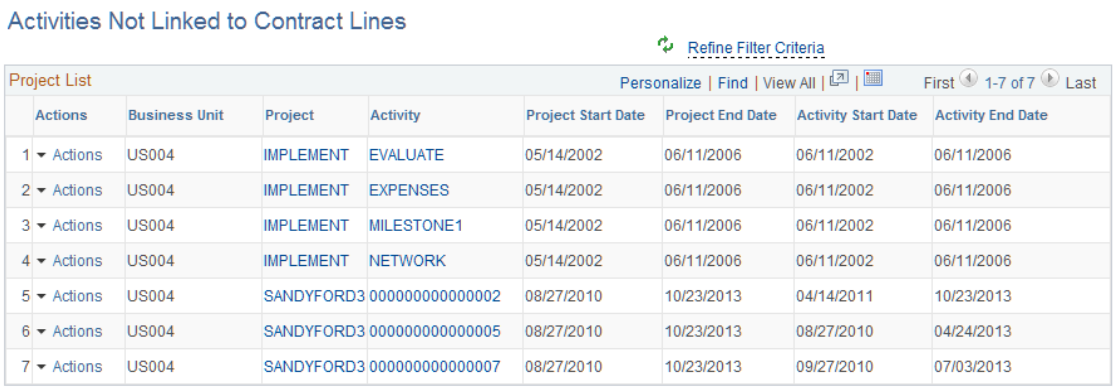


Activities Not Linked to Contract Lines

Refine Filter Criteria

Project List — Personalize | Find | View All | First 1-7 of 7 Last

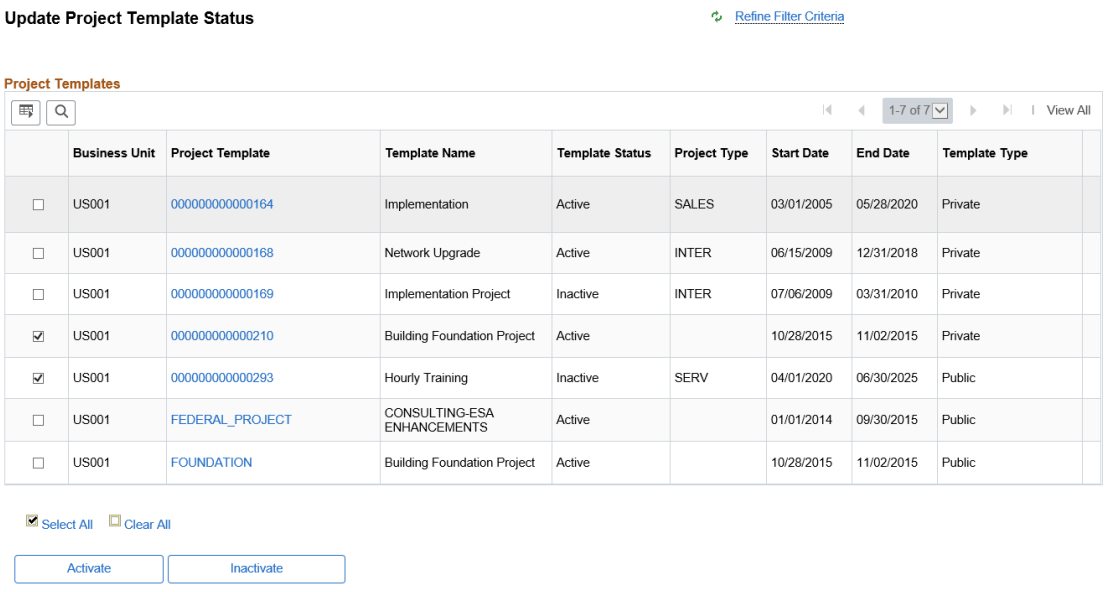
	Actions	Business Unit	Project	Activity	Project Start Date	Project End Date	Activity Start Date	Activity End Date
1	Actions	US004	IMPLEMENT	EVALUATE	05/14/2002	06/11/2006	06/11/2002	06/11/2006
2	Actions	US004	IMPLEMENT	EXPENSES	05/14/2002	06/11/2006	06/11/2002	06/11/2006
3	Actions	US004	IMPLEMENT	MILESTONE1	05/14/2002	06/11/2006	06/11/2002	06/11/2006
4	Actions	US004	IMPLEMENT	NETWORK	05/14/2002	06/11/2006	06/11/2002	06/11/2006
5	Actions	US004	SANDYFORD3	000000000000002	08/27/2010	10/23/2013	04/14/2011	10/23/2013
6	Actions	US004	SANDYFORD3	000000000000005	08/27/2010	10/23/2013	08/27/2010	04/24/2013
7	Actions	US004	SANDYFORD3	000000000000007	08/27/2010	10/23/2013	09/27/2010	07/03/2013

A user can review this list to determine if a project, activity, or both should be assigned to a rate based contract line for billing and revenue purposes. The grid displays the start and end dates of the project and activity. The project ID field serves as a link to the Project Definitions, General Information component. The activity ID field serves as a link to the Activity Definitions, General Information component.

Update Project Template Status

Use Update Project Template Status pagelet (PC_PROJ_TMPL_STS) to update the project template status for the listed project templates. Only those project templates that the user has access to are available for updating.

This example illustrates the fields and controls on the Update Project Template Status page. You can find definitions for the fields and controls later on this page.



Update Project Template Status

Refine Filter Criteria

Project Templates — 1-7 of 7 View All

	Business Unit	Project Template	Template Name	Template Status	Project Type	Start Date	End Date	Template Type
☐	US001	000000000000164	Implementation	Active	SALES	03/01/2005	05/28/2020	Private
☐	US001	000000000000168	Network Upgrade	Active	INTER	06/15/2009	12/31/2018	Private
☐	US001	000000000000169	Implementation Project	Inactive	INTER	07/06/2009	03/31/2010	Private
☑	US001	000000000000210	Building Foundation Project	Active		10/28/2015	11/02/2015	Private
☑	US001	000000000000293	Hourly Training	Inactive	SERV	04/01/2020	06/30/2025	Public
☐	US001	FEDERAL_PROJECT	CONSULTING-ESA ENHANCEMENTS	Active		01/01/2014	09/30/2015	Public
☐	US001	FOUNDATION	Building Foundation Project	Active		10/28/2015	11/02/2015	Public

Select All | Clear All

Activate | Inactivate

Field or Control	Description
Refine Filter Criteria	Click to filter project templates based on the given filter criteria.

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Field or Control	Description
Select Check Box	Select to Activate or Inactivate required project templates.
Project Template	Click project template link to view project general information in a modal window.
Template Status	Displays the project template status, *Active* or *Inactive*.
Template Type	Display if template is *Public* or *Private*.
Select All	Click to select all displayed project templates for updating template status.
Clear All	Click to deselect all selected project templates.
Activate	Click to activate selected project templates. Activated templates can be again inactivated.
Inactivate	Click to inactivate selected project templates. Inactivated templates can be again activated.

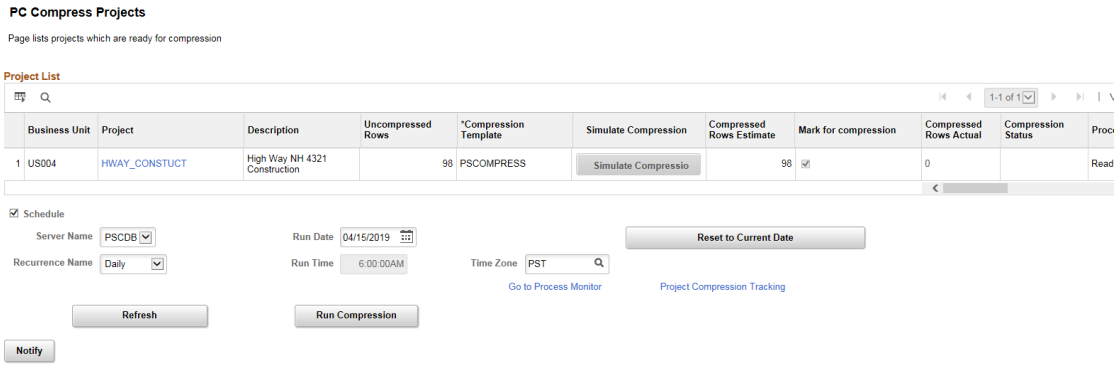
Project Data Compression

This group contains the following exception:

Projects Ready for Compression

Use the Projects Ready for Compression pagelet (PC_PRJ_COMPRSS_PNL) to select projects for compression.

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



Field or Control	Description
Project	Click Project link to open the Project Status page. Projects listed for compression will be based on those that the user has access to. However, administrator has access to all projects and hence can view all projects that are marked for compression.
Uncompressed Rows	Displays the total number of project transaction rows that have not been compressed.

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Field or Control	Description
Compression Template	Displays the compression template, which will be used to compress the transaction rows. The default template provided can be overridden.
Simulate Compression	Click to simulate the results of the compression process before running the actual compression process. The estimated reduction in transactional data is based on the selected compression template. The simulation output is not saved. The simulation does not consider date fields. Organizations should see a larger reduction in transactional data when the actual compression process is run and date fields are summarized based on the template selected.
Compressed Rows Estimate	Displays the estimated number of rows after compression.
Mark for Compression	Select the checkbox to include the project in the compression process.
Compressed Rows Actual	Displays the number of rows after compression.
Compression Status	Displays the compression status. Values include: • Archived • In History • Purged • Restored after Archival
Processing Status	Displays status of the compression process. Values include: • Ready For Compression - Ready for compression process to trigger. • Check Project Compression Tracking – Once project is compressed, user can initiate the next action from Project Compression Tracking. • Compression Triggered – Indicates when compression process is executed.
Schedule	Select check box to schedule the compression process. Scheduling can be done only by the administrator. Hence this field is not activated for other users. During the scheduled compression, PC_SCH_CMPRS process is triggered. This process in turn triggers the PC_COMPRESS process for each project. If the compression process is not scheduled then the PC_COMPRESS process is directly triggered and is executed in a sequence for each project. **Note:** The scheduled compression process will include all projects approved for compression when the process scheduler reaches the designated start time. If you wish to compress subset of projects at different scheduled times, you must allow the first scheduled process to complete and then schedule compression of the next set of projects.

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Field or Control	Description
Server Name	Select the server to schedule the compression process.
Run Date	Specify the date to execute the compression process.
Recurrence Name	Select the recurrence period for the compression process.
Run Time	Based on the recurrence selected, run time for the compression process will be displayed.
Time Zone	Select time zone for the scheduled compression run.
Reset to Current Date	Click to reset the schedule of the first compression run to the current date.
Refresh	Click to view the latest compression status, processing status, and actual compressed row count once the compression process is triggered.
Run Compression	Click to start the compression process.
Project Compression Tracking	Click to open the Project Compression Tracking page and view the compression log details.

Understanding the Projects WorkCenter - Links

This page shot provides an example of how the Projects WorkCenter - Links section can be set up:

This example illustrates the fields and controls on the Projects WorkCenter - Links section. The primary purpose of this pagelet is to minimize the number of clicks to access critical path components and pages.

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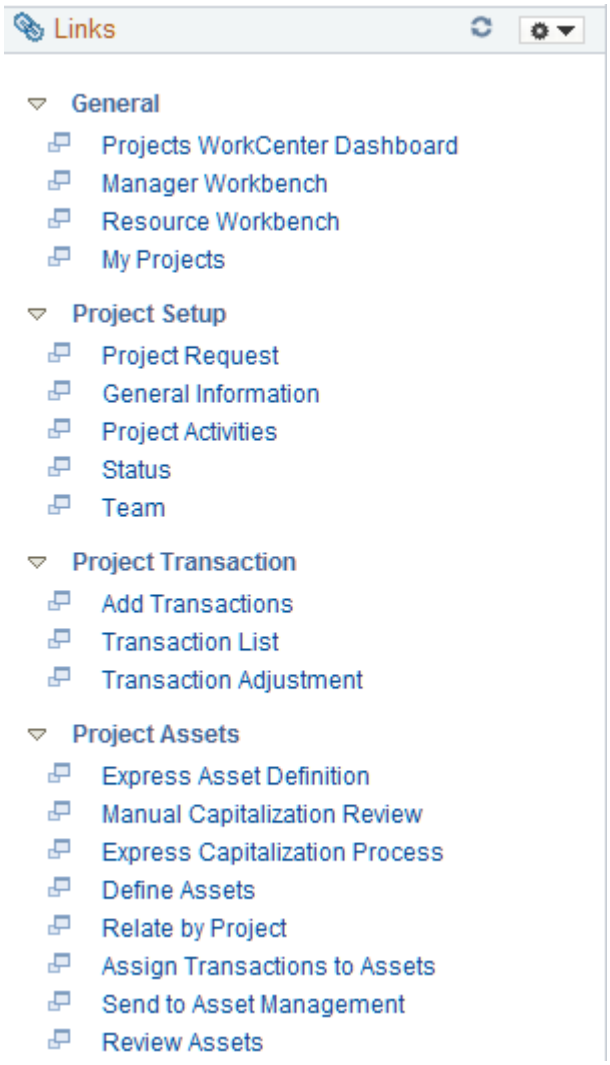

The Links section provides access to internal and external links.

System administrators use the Enterprise Components: Configuring Pagelets to set up the WorkCenter Links section for end users.

Enter users use theApplication Fundamentals: Define User “Links” Links – Links Pagelet Personalization Page to personalize the Links section for personal use.

Understanding the Projects WorkCenter - Queries

This page shot provides an example of how the Projects WorkCenter - Queries pagelet can be set up:

This example illustrates the fields and controls on the WorkCenter - Queries pagelet.

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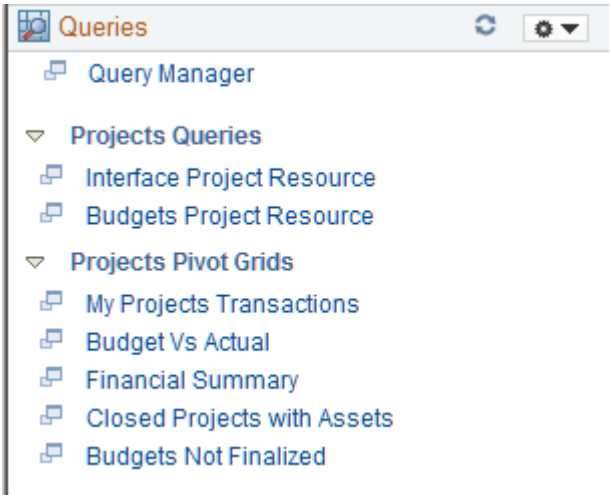


The Queries pagelet provides access to public queries, private queries, and Pivot grids.

System administrators use theEnterprise Components: Configuring Pagelets to set up the WorkCenter Queries pagelet for end users. End users use the Application Fundamentals: Define User Query Links – Queries Pagelet Personalization Page to personalize the Queries pagelet for personal use.

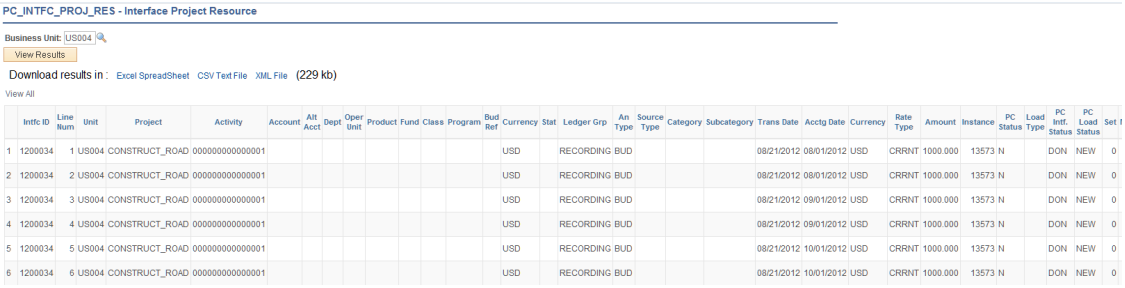
Common Elements Used with the Projects WorkCenter - Queries Pagelet

Field or Control	Description
	Select this icon to display menu options. These options can include: • Prompts: enables you to change grid search values. • Export Data: enables you to export the data to a Microsoft Excel spreadsheet. • Hide Chart/Display Chart • Chart Options: displays the user Charting Options window. • Save

Interface Project Resource Query

Use the Interface Project Resource query to view all rows in the Project Resource Interface table (INTFC_PROJ_RES).

This example illustrates the fields and controls on the Interface Project Resource query.



	Intfc ID	Line Num	Unit	Project	Activity	Account	Alt Acct	Dept	Oper Unit	Product	Fund	Class	Program	Bud Ref	Currency	Stat	Ledger Grp	An Type	Source Type	Category	Subcategory	Trans Date	Acctg Date	Currency	Rate Type	Amount	Instance	PC Status	Load Type	PC Intf. Status	PC Load Status	Set
1	1200034	1	US004	CONSTRUCT_ROAD	000000000000001										USD		RECORDING	BUD				08/21/2012	08/01/2012	USD	CRRNT	1000.000	13573	N		DON	NEW	0
2	1200034	2	US004	CONSTRUCT_ROAD	000000000000001										USD		RECORDING	BUD				08/21/2012	08/01/2012	USD	CRRNT	1000.000	13573	N		DON	NEW	0
3	1200034	3	US004	CONSTRUCT_ROAD	000000000000001										USD		RECORDING	BUD				08/21/2012	09/01/2012	USD	CRRNT	1000.000	13573	N		DON	NEW	0
4	1200034	4	US004	CONSTRUCT_ROAD	000000000000001										USD		RECORDING	BUD				08/21/2012	09/01/2012	USD	CRRNT	1000.000	13573	N		DON	NEW	0
5	1200034	5	US004	CONSTRUCT_ROAD	000000000000001										USD		RECORDING	BUD				08/21/2012	10/01/2012	USD	CRRNT	1000.000	13573	N		DON	NEW	0
6	1200034	6	US004	CONSTRUCT_ROAD	000000000000001										USD		RECORDING	BUD				08/21/2012	10/01/2012	USD	CRRNT	1000.000	13573	N		DON	NEW	0

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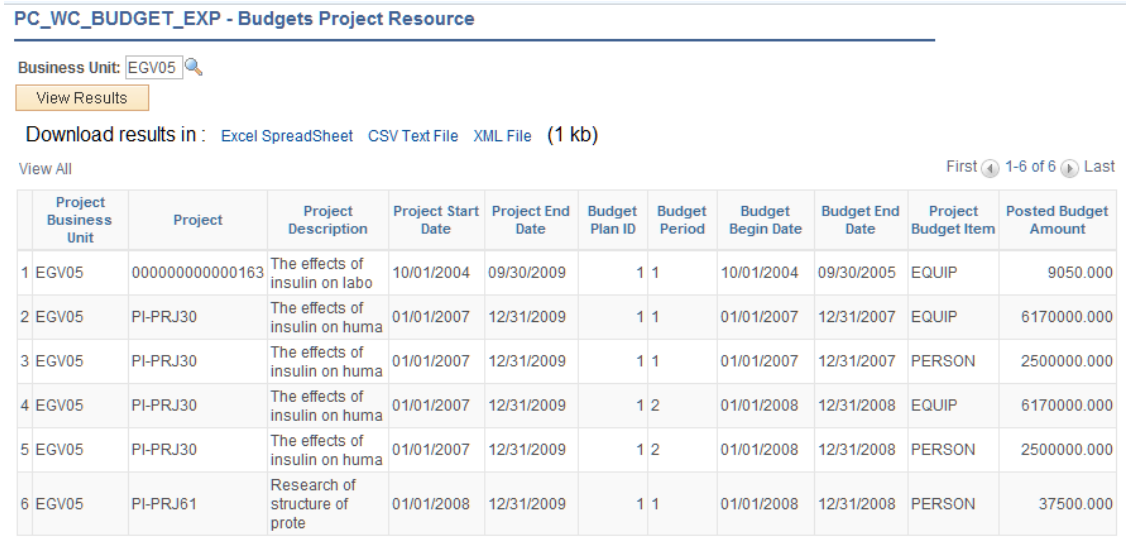
Budgets Project Resource Query

Use the Budgets Project Resource query to view budget rows that have been sent to PeopleSoft Commitment Control. The records that appear in this query are those where the budget is created, but are not in the Project Resource table (PROJ_RESOURCE).

This example illustrates the fields and controls on the Budgets Project Resource query.



PC_WC_BUDGET_EXP - Budgets Project Resource

Business Unit: EGV05

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)

View All First 1-6 of 6 Last

	Project Business Unit	Project	Project Description	Project Start Date	Project End Date	Budget Plan ID	Budget Period	Budget Begin Date	Budget End Date	Project Budget Item	Posted Budget Amount
1	EGV05	000000000000163	The effects of insulin on labo	10/01/2004	09/30/2009	1	1	10/01/2004	09/30/2005	EQUIP	9050.000
2	EGV05	PI-PRJ30	The effects of insulin on huma	01/01/2007	12/31/2009	1	1	01/01/2007	12/31/2007	EQUIP	6170000.000
3	EGV05	PI-PRJ30	The effects of insulin on huma	01/01/2007	12/31/2009	1	1	01/01/2007	12/31/2007	PERSON	2500000.000
4	EGV05	PI-PRJ30	The effects of insulin on huma	01/01/2007	12/31/2009	1	2	01/01/2008	12/31/2008	EQUIP	6170000.000
5	EGV05	PI-PRJ30	The effects of insulin on huma	01/01/2007	12/31/2009	1	2	01/01/2008	12/31/2008	PERSON	2500000.000
6	EGV05	PI-PRJ61	Research of structure of prote	01/01/2008	12/31/2009	1	1	01/01/2008	12/31/2008	PERSON	37500.000

My Projects Transactions Pivot

Use the My Projects Transactions pivot grid (PTPG_PGVIEWER) to view amounts from summary tables. Users can view the amounts at the project, analysis type, and activity level. They can filter based on resource type, category, subcategory, or category and subcategory. The query for this pivot grid selects data for projects listed in a user's My Projects list. A business unit is required and all project transaction amounts are displayed in the currency of the Project Costing business unit.

The My Projects Transactions pivot grid is based on a query that is using the My Projects transaction list. The list is determined by the user, and the associated transactions from the summary table (PC_SUMMARY) for those projects. This query does not use PROJ_RESOURCE.

This example illustrates the fields and controls on the My Projects Transactions pivot (1 of 3).

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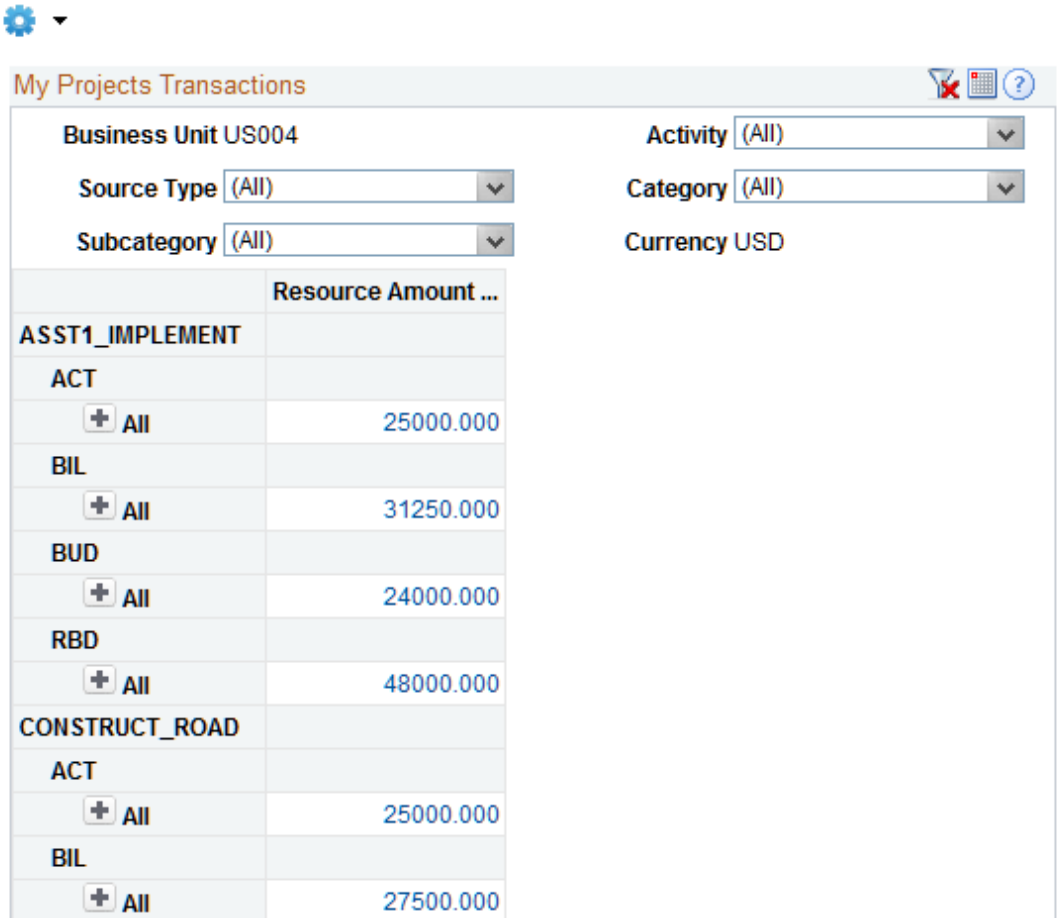
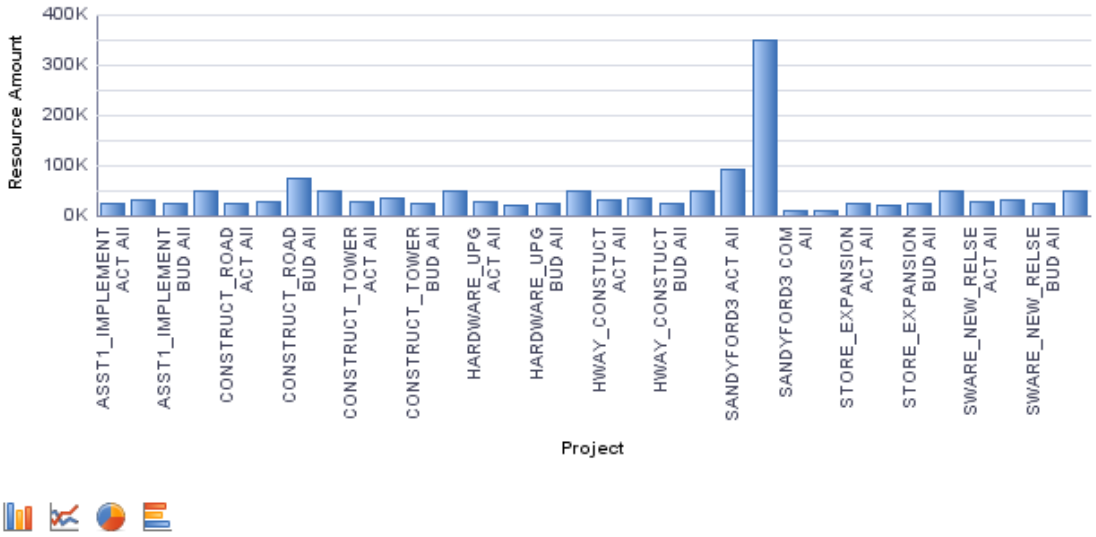


Users can click a link in the Resource Amount column to access the Pivot Grid Drilldown page.

This example illustrates the fields and controls on the My Projects Transactions pivot (2 of 3).



This example illustrates the fields and controls on the My Projects Transactions pivot (3 of 3).

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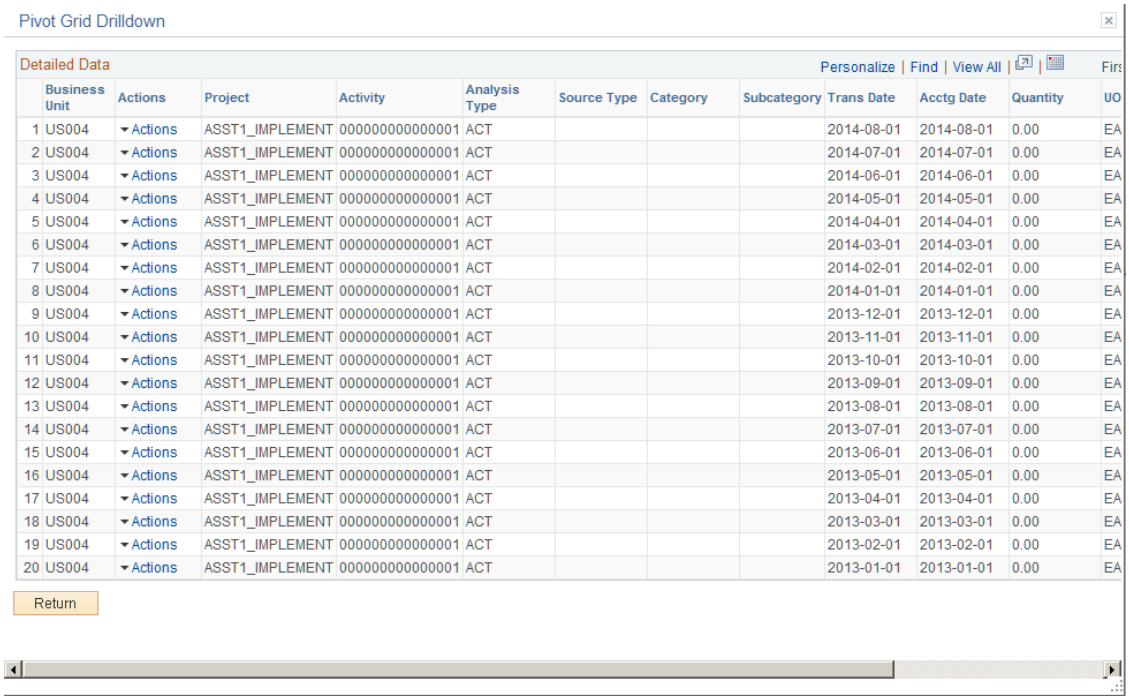
Pivot Grid Drilldown

Detailed Data

Personalize | Find | View All | First

	Business Unit	Actions	Project	Activity	Analysis Type	Source Type	Category	Subcategory	Trans Date	Acctg Date	Quantity	UO
1	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-08-01	2014-08-01	0.00	EA
2	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-07-01	2014-07-01	0.00	EA
3	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-06-01	2014-06-01	0.00	EA
4	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-05-01	2014-05-01	0.00	EA
5	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-04-01	2014-04-01	0.00	EA
6	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-03-01	2014-03-01	0.00	EA
7	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-02-01	2014-02-01	0.00	EA
8	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2014-01-01	2014-01-01	0.00	EA
9	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-12-01	2013-12-01	0.00	EA
10	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-11-01	2013-11-01	0.00	EA
11	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-10-01	2013-10-01	0.00	EA
12	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-09-01	2013-09-01	0.00	EA
13	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-08-01	2013-08-01	0.00	EA
14	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-07-01	2013-07-01	0.00	EA
15	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-06-01	2013-06-01	0.00	EA
16	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-05-01	2013-05-01	0.00	EA
17	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-04-01	2013-04-01	0.00	EA
18	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-03-01	2013-03-01	0.00	EA
19	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-02-01	2013-02-01	0.00	EA
20	US004	Actions	ASST1_IMPLEMENT	000000000000001	ACT				2013-01-01	2013-01-01	0.00	EA

Return

From the Detail view, a user can use the **Related Actions** drop down option to open the Project Transactions component.

> **Note**
>
> Transactions that appear in the Project Transactions component are from the PROJ_RESOURCE record, not the summary tables. Therefore, although the amounts should ultimately match, the individual transactions may not match due to the fact that the Pivot Grid and Pivot Grid Drilldown data is coming from the summary table, and may be made up of more than one transaction. All transactions can be viewed in the PROJ_RESOURCE table.

Budget Vs Actual Pivot

Use the Budget Vs Actual pivot grid to view the Cost Budget, Actual Budget, Cost Variance, Revenue Budget, and Revenue for a given Budget Period. The information is created from projects that are added to My Projects for the user who is logged in.

This example illustrates the fields and controls on the Budget Vs Actual pivot (1 of 2).

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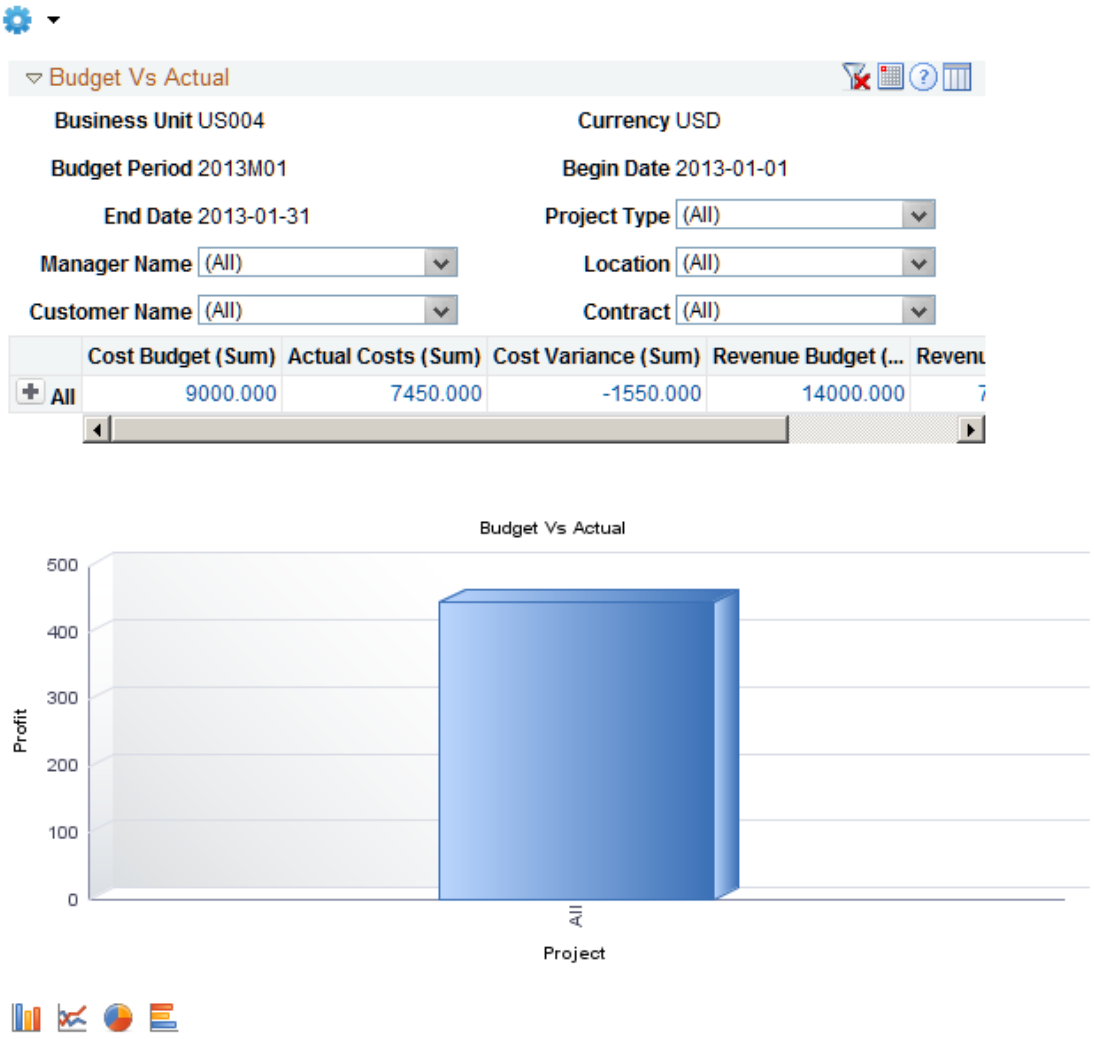
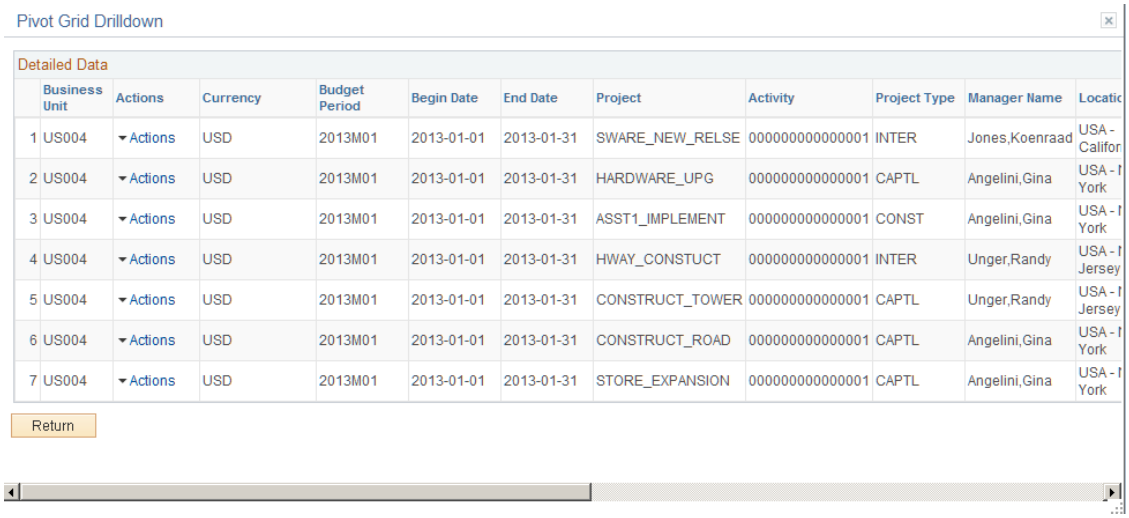


This example illustrates the fields and controls on the Budget Vs Actual pivot (2 of 2).



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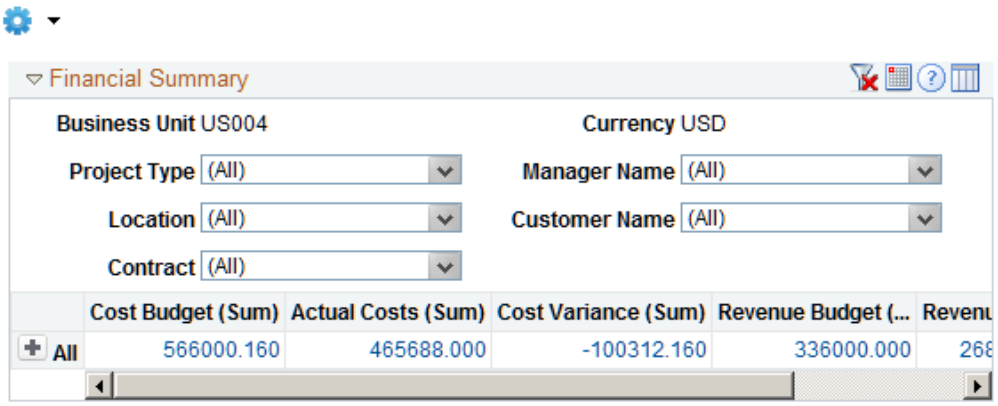
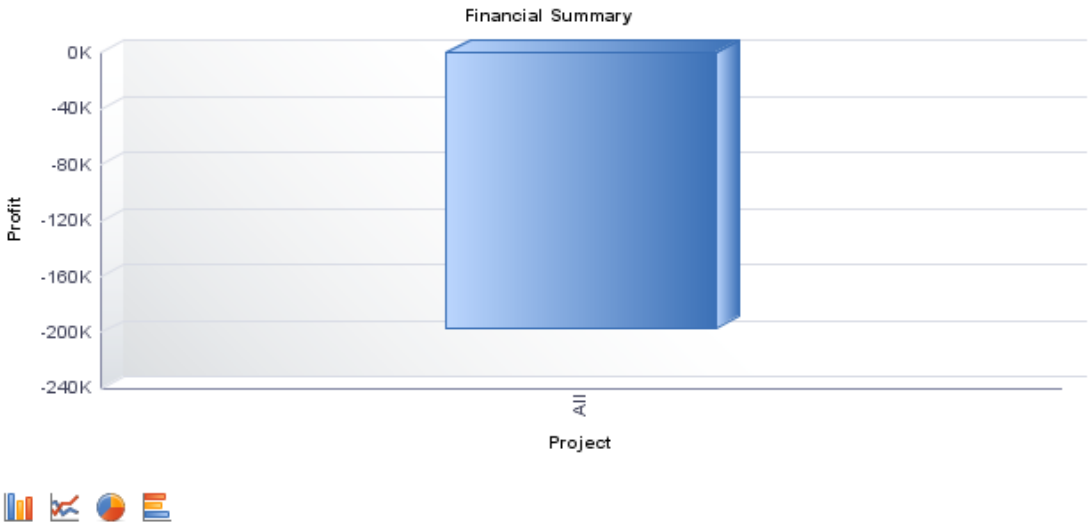
Financial Summary Pivot

Use the Financial Summary pivot grid to view the Cost Budget, Actual Budget, Cost Variance, Revenue Budget, and Revenue for the entire life of a project. The information is created from projects that are added to My Projects for the user who is logged in.

This example illustrates the fields and controls on the Financial Summary pivot.





Closed Projects with Assets Pivot

Use the Closed Projects with Assets pivot grid to view projects that have a processing status of Closed and have an asset associated with the project that is in an Open status. The asset statuses included are ‘I’, ‘W’, ‘M’, ‘B’ and ‘C’.

From the Detail view, a user can access the Project Status component and the Cost Adjust/ Transfer Asset component found in Asset Management. These components enable the user to either change the project status or move the asset to an open project.

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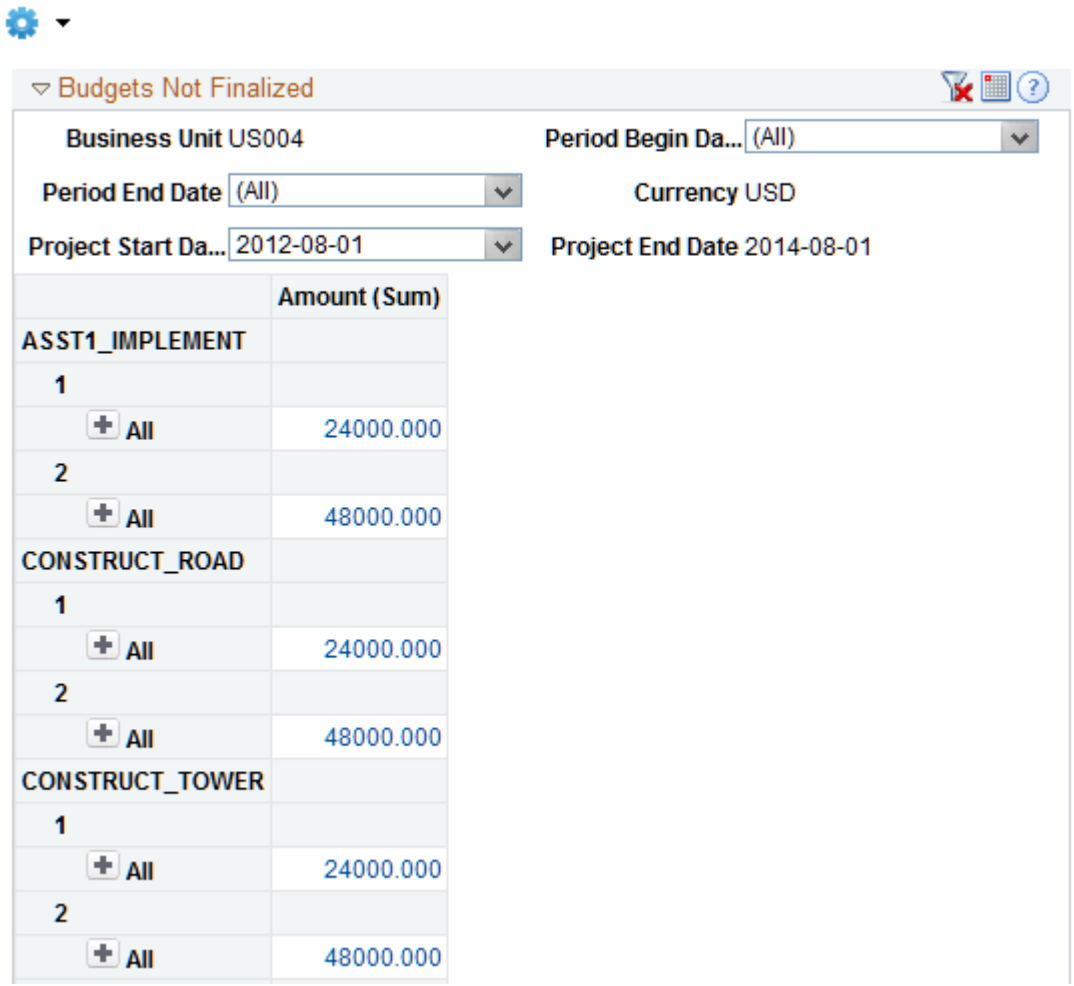
Budgets Not Finalized Pivot

Use the Budgets Not Finalized pivot grid to view project budget information for budget plans that have not been finalized to Commitment Control, if the budget is for a Commitment Control ledger group, or Projects, if it is a Project Costing-only budget. The projects displayed are active projects and are added to My Projects for the user who is logged in.

This example illustrates the fields and controls on the Budgets Not Finalized pivot (1 of 3).



The default view displays all budget periods and are summarized for each project and budget plan. A user can filter based on period begin and end dates as well as the project start and end dates. All amounts are displayed in the currency of the Project Costing business unit.

This example illustrates the fields and controls on the Budgets Not Finalized pivot (2 of 3).

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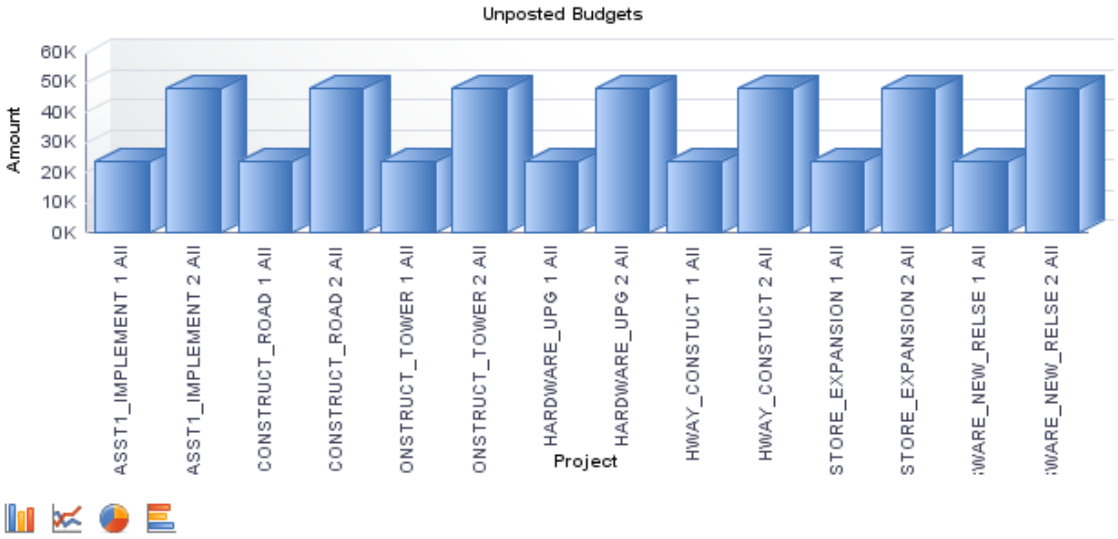
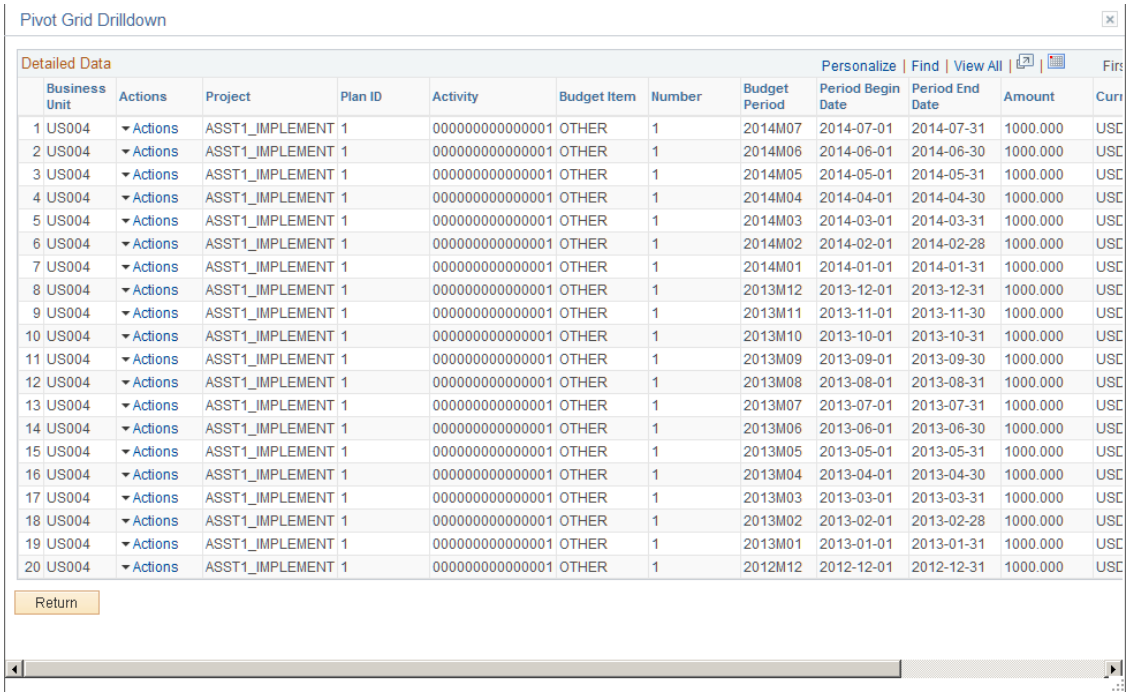


This example illustrates the fields and controls on the Budgets Not Finalized pivot (3 of 3).



	Business Unit	Actions	Project	Plan ID	Activity	Budget Item	Number	Budget Period	Period Begin Date	Period End Date	Amount	Curr
1	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2014M07	2014-07-01	2014-07-31	1000.000	USD
2	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2014M06	2014-06-01	2014-06-30	1000.000	USD
3	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2014M05	2014-05-01	2014-05-31	1000.000	USD
4	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2014M04	2014-04-01	2014-04-30	1000.000	USD
5	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2014M03	2014-03-01	2014-03-31	1000.000	USD
6	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2014M02	2014-02-01	2014-02-28	1000.000	USD
7	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2014M01	2014-01-01	2014-01-31	1000.000	USD
8	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M12	2013-12-01	2013-12-31	1000.000	USD
9	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M11	2013-11-01	2013-11-30	1000.000	USD
10	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M10	2013-10-01	2013-10-31	1000.000	USD
11	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M09	2013-09-01	2013-09-30	1000.000	USD
12	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M08	2013-08-01	2013-08-31	1000.000	USD
13	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M07	2013-07-01	2013-07-31	1000.000	USD
14	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M06	2013-06-01	2013-06-30	1000.000	USD
15	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M05	2013-05-01	2013-05-31	1000.000	USD
16	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M04	2013-04-01	2013-04-30	1000.000	USD
17	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M03	2013-03-01	2013-03-31	1000.000	USD
18	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M02	2013-02-01	2013-02-28	1000.000	USD
19	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2013M01	2013-01-01	2013-01-31	1000.000	USD
20	US004	Actions	ASST1_IMPLEMENT	1	000000000000001	OTHER	1	2012M12	2012-12-01	2012-12-31	1000.000	USD

From the Detail view, a user can use the Related Actions drop down option to access the Budget Detail component.

Understanding the Projects WorkCenter - Reports and Processes

This page shot provides an example of how the Projects WorkCenter – Reports/Processes section can be set up.

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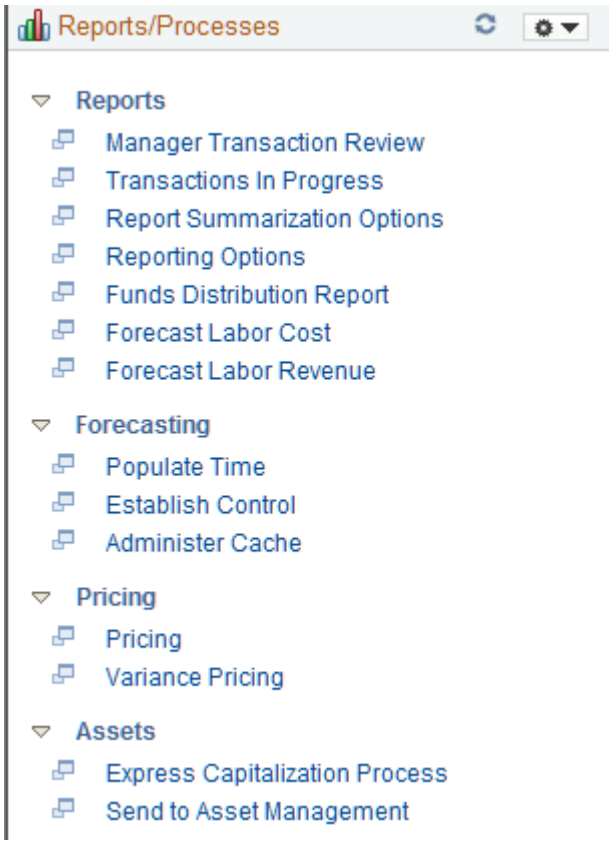
This example illustrates the fields and controls on the Projects WorkCenter - Reports and Processes pagelet.



The Reports/Processes pagelet provides access to system defined reports and processes for which a user has access.

System administrators used the Enterprise Components: Configuring Pagelets to set up the WorkCenter Reports/Processes pagelet for end users. End users use theApplication Fundamentals: Define User “Reports” Links – Reports/Processes Pagelet Personalization Page to personalize the Reports/Processes pagelet for personal use.

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Using the PeopleSoft Fluid Projects WorkCenter

Understanding the PeopleSoft Fluid Projects WorkCenter

The Fluid Projects WorkCenter identifies configuration exceptions as My Work pagelets. Related actions enable users to clear exceptions quickly. Additional tools (example: Projects Update Wizard) are available as links in the WorkCenter and provide users the ability to update project information, such as project and activity end date, project type, project manager and project team across the organization quickly using the fluid interface.

Prerequisite

PeopleTools 8.55 is required for the PeopleSoft Fluid WorkCenters.

Setting Up the PeopleSoft Fluid Projects WorkCenter

This topic discusses the setup for the PeopleSoft Fluid Projects WorkCenter.

PeopleTools 8.55 is required for the PeopleSoft Fluid WorkCenters.

To personalize the PeopleSoft Fluid Projects WorkCenter, see Application Fundamentals: Setting Up and Personalizing PeopleSoft Fluid WorkCenters.

Related Topics

- Application Fundamentals: Understanding PeopleSoft Fluid WorkCenters
- Application Fundamentals: Understanding How to Set Up PeopleSoft Classic and Fluid WorkCenters As a System Administrator
- Application Fundamentals: Understanding Delivered WorkCenters and Dashboards

Using the PeopleSoft Fluid Projects WorkCenter

This topic discusses how to use the PeopleSoft Projects WorkCenter.

Pages Used with the Fluid Projects WorkCenter

Page Name	Definition Name	Usage
Projects WorkCenter Tile	PC_WORKCENTER_FL	Access the Projects WorkCenter page in the PeopleSoft Fluid User Interface.
Projects WorkCenter page	PC_WORKCENTER_FL	Access the pagelets in the left pane to view or edit the exceptions under them.

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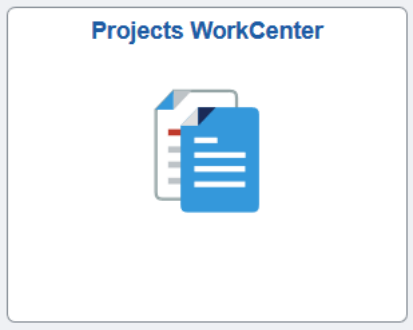
Projects WorkCenter Tile

Use the Projects WorkCenter Tile (PC_WORKCENTER_FL) to access the Projects WorkCenter page in the PeopleSoft Fluid User Interface.

Navigation

The **Projects WorkCenter** tile can be placed on any PeopleSoft Fluid Home page.

This example illustrates the fields and controls on the Projects WorkCenter tile as displayed.



For additional information about how to add a tile to a PeopleSoft Fluid Home page, see *PeopleTools: Applications User's Guide*: “Working With PeopleSoft Fluid User Interface”, "Working With Fluid Homepages", "Managing Tiles".

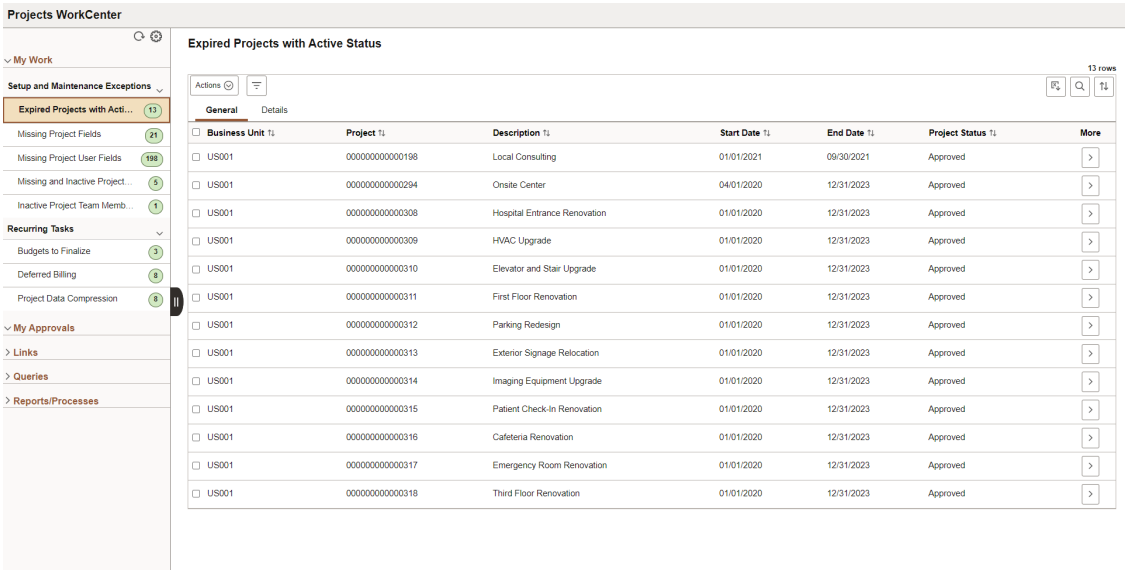
Projects WorkCenter page

Use the Projects WorkCenter page (PC_WORKCENTER_FL) to access the pagelets such as My Work and Links using the PeopleSoft Fluid User Interface.

Navigation

Select the **Projects WorkCenter** tile on a PeopleSoft Fluid Home page.

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



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Field or Control	Description
Personalize	Click the Personalize icon to access these options: • *Personalize*: Select to access the Application Fundamentals: Personalize Page (Fluid) (EOWC_WORKLINKS_FL), where you can determine if you want the group expanded or collapsed when you enter the page. Select the **Done** button to apply your changes. • *Edit Filters:* Select to access the Application Fundamentals: Edit Filters Personalize Page (Fluid) for Current Work and Exceptions. From this page, you can access the Application Fundamentals: Configure Filter Values Page (Fluid).
Action	Select rows and click the required action to modify the selected rows. Related actions for each exception are different.
Filter	Click to access the Refine Filter Criteria page. Based on the selected exception, filter criteria differ from the other.

Working with Exceptions and Recurring Tasks in the My Work Pagelet

The My Work pagelet contains the Setup and Maintenance Exceptions, which are:

- Missing Project User Fields
- Missing Project Fields
- Missing and Inactive Project Managers
- Expired Projects with Active Status
- Inactive Project Team Members

The My Work pagelet also contains the Recurring Tasks, which are:

- Budgets to Finalize
- Deferred Billing
- Project Data Compression

Pages Used to Work with Exceptions and Recurring Tasks in the My Work Pagelet

This topic discusses the exceptions and recurring tasks under the My Work pagelet.

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Page Name	Definition Name	Usage
Missing Project User Fields	PC_PRJUSRFLD_FL	View and update missing project user fields from the Project General component.
Missing Project Fields	PC_WC_PRJ_FL	View and update projects with blank location or project type fields.
Missing and Inactive Project Managers	PC_WC_MISSG_MGR_FL	View and update projects, where there is no project manager or the project manager is no longer with the organization.
Expired Projects with Active Status	PC_PASTPROJ_FL	View and update projects with prior end dates, whose status is still *Active*.
Inactive Project Team Members	PC_WC_INACT_EMP_FL	View and update project team members, where the project member is no longer with the organization.
Budgets to Finalize	PC_MASS_BPFINAL_FL	View and finalize multiple project budgets.
Deferred Billing	PC_PROJRES_FL	View and update deferred billings.
Project Data Compression	PC_PRJ_COMPRESS_FL	Project superusers can review projects ready for compression and run the compression process.

Missing Project User Fields

Use the Missing Project User Fields (PC_PRJUSRFLD_FL) page to view a list of projects with blank values for project user fields and update the fields using the available related actions. This exception excludes projects with *Closed* status.

Navigation

Select the Projects WorkCenter tile.

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Field or Control	Description
Action icon	Select an exception line and click the *Action* icon to perform the required related action for the exception. Click the *Update Missing Project User Fields* action and enter value as appropriate. The Update Missing Project User Field window lets you enter values based on your selection. It could be a text field, currency, date, or amount. The **User Fields** tab on the Project General Information component reflects the updates. The updated lines are removed from the grid. For more information on the User fields tab, see Project Definitions - User Fields Page. **Note:** If you try to update multiple user fields at a time, a message displays indicating that you cannot continue. You can update the same user field (for example, user field 1) across multiple projects in a single action, but you cannot update multiple user fields (for example, user field 1 and user field 2) in a single action.
Details icon	Click to open the general information component of a project.

If your organization does not use or require entry into all the project user fields, use the **Filter** icon and enter values into only those fields.

> **Note**
>
> If any errors occur while updating a project, an error message displays in the grid.

Missing Project Fields

Use the Missing Project Fields (PC_WC_PRJ_FL) page to view a list of projects with blank location or project type. You can update the missing values using the related actions available on the page. This exception excludes projects with a *Closed* status.

Navigation

Select the Projects WorkCenter tile.

Field or Control	Description
Action icon	Select an appropriate related action. • *Update Project Type*: Enter the project type. • *Update Project Location*: Enter the effective date and location code. Effective date is the current date by default. You can modify it as required. **Note:** Updates to Project Type and Project Location must be done separately and cannot be combined.

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Missing and Inactive Project Managers

Use the Missing and Inactive Project Managers (PC_WC_MISSG_MGR_FL) page to view a list of projects where there is no project manager or the project manager is no longer with the organization. This exception also includes projects for which the manager's schedule end date is prior to the project end date. This way, the exception assists project administrators in proactively identifying projects that will not have a project manager at a later date. This exception excludes projects with a *Closed* status.

Most projects should have a project manager with an *Active* status. You can add a manager to a project, replace the existing manager with another manager, or extend the schedule end date of the existing manager.

> **Note**
>
> Some projects might not require a project manager. Use filters such as project type, project status and business unit to remove such projects.

Navigation

Select the Projects WorkCenter tile.

Field or Control	Description
Action icon	Displays the *Update Manager End Date* and *Add or Replace Manager* actions. **Note:** The system does not display the Action icon if you have installed both *Resource Management (RM)* and *Program Management (PGM)* products.

The table below explains some scenarios where you can add, replace, or update a project manager:

Manager Status	Related Action to be selected	Use
No Manager	Add or Replace Manager	You can add a manager if a project does not have one. The Add or Replace Manager window displays the following fields: • Effective Date • Manager Name • Project Role **Note:** The Effective Date in the Add Manager window must be within the Project Start and End dates.

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Manager Status	Related Action to be selected	Use
Inactive	Add or Replace Manager	You can replace a manager who is no longer with the organization (for example, employee status is *Inactive*). **Note:** When replacing an existing project manager with a new manager, the schedule end date of the existing manager is updated to a day prior to the start date of the new manager. The schedule end date of the new manager is updated to the Project End Date.
Active	Update Manager End Date or Add or Replace Manager	In some cases, a project might get extended. If the schedule end date of the project manager was not extended, it will eventually result in the project without an active project manager. In such case, you can update the manager's end date or, add or replace the manager. • *Update Manager End Date window*: Update project manager's schedule end date to match the project end date. • *Add or Replace Manager*: Replace the existing manager with a new manager. You must enter a start date for the new project manager and the end date is updated to the Project End Date. Also, the end date of the current project manager is updated to a day prior to the start date of the new project manager.

Note

The **Project Manager** tab on the Project General component and the Project Team component are updated with the new information.

See Project Definitions - Manager Page

Creating Project and Activity Teams

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> **Note**
>
> If any errors occur while you add, replace or update a project manager to a project, then an error message is displayed in the grid. You can resolve some of the errors from My Work Exception by entering the required update information. To resolve others, you might need to navigate to the respective project components.

Expired Projects with Active Status

Use the Expired Projects with Active Status(PC_PASTPROJ_FL) page to view a list of projects with prior end dates, and whose status is still *Active*. You can update the project status to *Closed* or extend the project end date. If more information is needed before you clear the exception, you can use the Notify action to communicate with others in your organization.

Navigation

Select the Projects WorkCenter tile.

Field or Control	Description
Action icon	Displays the related actions you can perform to clear the exceptions, which are: • *Update Status*: The Update Project Status window displays the Effective Date, Project Status, Project Priority, Interest Calculation Factor, and Description (all fields on the Project Status component). If Interest Calculation Factor and Project Priority are not applicable for your organization, you can hide those fields using the Page and Field Configurator. For more information on the Page and Field Configurator, see *Enterprise Components: Using Page and Field Configurator*. • *Update End Date*: Enter the project End date. You can only move a project end date forward. • *Email Notification*: You can notify individuals associated with the project that there is an issue that needs to be reviewed.

Inactive Project Team Members

Use the Inactive Project Team Members (PC_WC_INACT_EMP_FL) page to view and update project team members who have been terminated. You can either update the team member's schedule end date to their termination date or replace the team member with another employee in which case the terminated employee's schedule end date is also updated. The exception includes terminated employees whose schedule end date is a future date. Terminated employees whose schedule dates of work have past are not included in the exception.

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> **Note**
>
> Inactive project team members include employees with a status other than *Active*, *Leave with Pay*, *Leave of Absence* and *Short Work Break*.

Navigation:

Select the Projects WorkCenter tile.

Field or Control	Description
Actions	Select an appropriate related action. The available options are: • *Replace Team Member*: Select the team member to be replaced and click the related action to replace the team member with another employee. The default Schedule Start Date, End Date and Role for the new team member will be the same as the current employee being replaced. You can edit these values for the new team member. The related action updates the schedule end date for the terminated employee and in some cases the schedule start date. A terminated employee is never deleted or removed from the project team. If the inactive date for the replaced team member is between the schedule start date and schedule end date, then the schedule end date is updated to the employee's termination date minus 1 day. Similarly, if the inactive date is before the Project Start Date or before the Schedule Start Date, then the schedule start and end date is updated to the project start date. • *Update Team Member End Date*: Select the team member and click the related action to update the team member schedule end date.

One exception that will not be cleared after taking action is a team member who is terminated before the Project Start Date and the start date of the project is a future date (later than the current system date). In this scenario, the Schedule End Date is updated Project Start Date. You can use the icon on the grid to open the Project Team component and delete the employee from the team. Alternatively, wait until Project Start Date at which time the employee will no longer show as an exception.

In another scenario, you may receive an error trying to update the schedule end date of a terminated employee who has multiple schedules on a project. Although unlikely, this will occur when the team member has more schedules to update than the number of days between the project start date and their termination date minus 1 day. You can open the project team component and delete one or more of the schedules. This is most likely to occur when the termination date of the employee is near the project start date and the employee has many schedules on the project.

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Budgets to Finalize

Use the Budgets to Finalize (PC_MASS_BPFINAL_FL) page to view and finalize multiple project budgets.

Navigation:

Select the Projects WorkCenter tile.

Field or Control	Description
Actions	Select an appropriate related action. The available options are: • *Finalize*: Select the budgets to be finalized and click the related action to schedule the budget finalization. • *Review Process Monitor*: Select to view the process status.
›	Click to view the project budget details.

> **Note**
>
> The Budgets to Finalize exception includes projects where the distributed amount does not equal the finalized amount, meaning there is an amount to be finalized. This includes the initial budget creation and changes to an existing budget. Project must be in approved status and the budget header status must be active. Amounts must be fully distributed across project activities and spread across time periods to be eligible for processing.

Deferred Billing

Use the Deferred Billing (PC_PROJRES_FL) page to view and update deferred billing transactions. You can view all active project transactions whose analysis type is DEF (deferred billing) and the Billing distribution status (BI_DISTRIB_STATUS) is P (priced).

Navigation:

Select the Projects WorkCenter tile.

Field or Control	Description
Actions	Select a row and click the *Actions* icon to perform the required related action. The available options are: • *Update Billing Date*: Review and update billing date for one or multiple deferred billing transactions. Clear the billing date to enable a transaction for immediate billing. • *Place Bill Plan On Hold*: Place a bill plan on hold or update the hold reason code if the bill plan is already on hold. • *Remove Bill Plan Hold*: Remove the hold on a bill plan.

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Field or Control	Description
Plan ID	Click to view the PeopleSoft Contracts: Billing Plan - Billing Plan General Page.

Project Data Compression

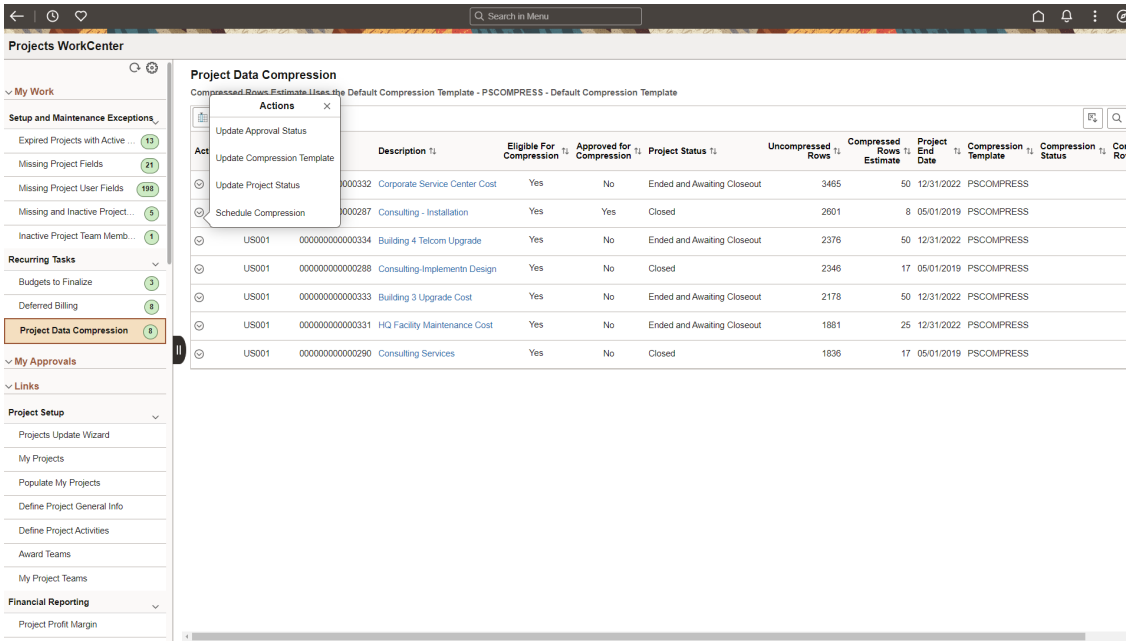
Use the Project Data Compression (PC_PRJ_COMPRESS_FL) page to review projects ready for compression and schedule or run the compression process by the Project Superuser.

As an incentive to running the project data compression process, the Project Data Compression page displays to the user the estimated row counts in proj_resource after running the compression process. With this information, project administrators have a good indication on the level of summarization and reduced count of rows in the project costing proj_resource table after running the compression process.

Navigation:

Projects WorkCenter, and then **Recurring Tasks**, and then **Project Data Compression**

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



This example illustrates the fields and controls on the Schedule Compression page.

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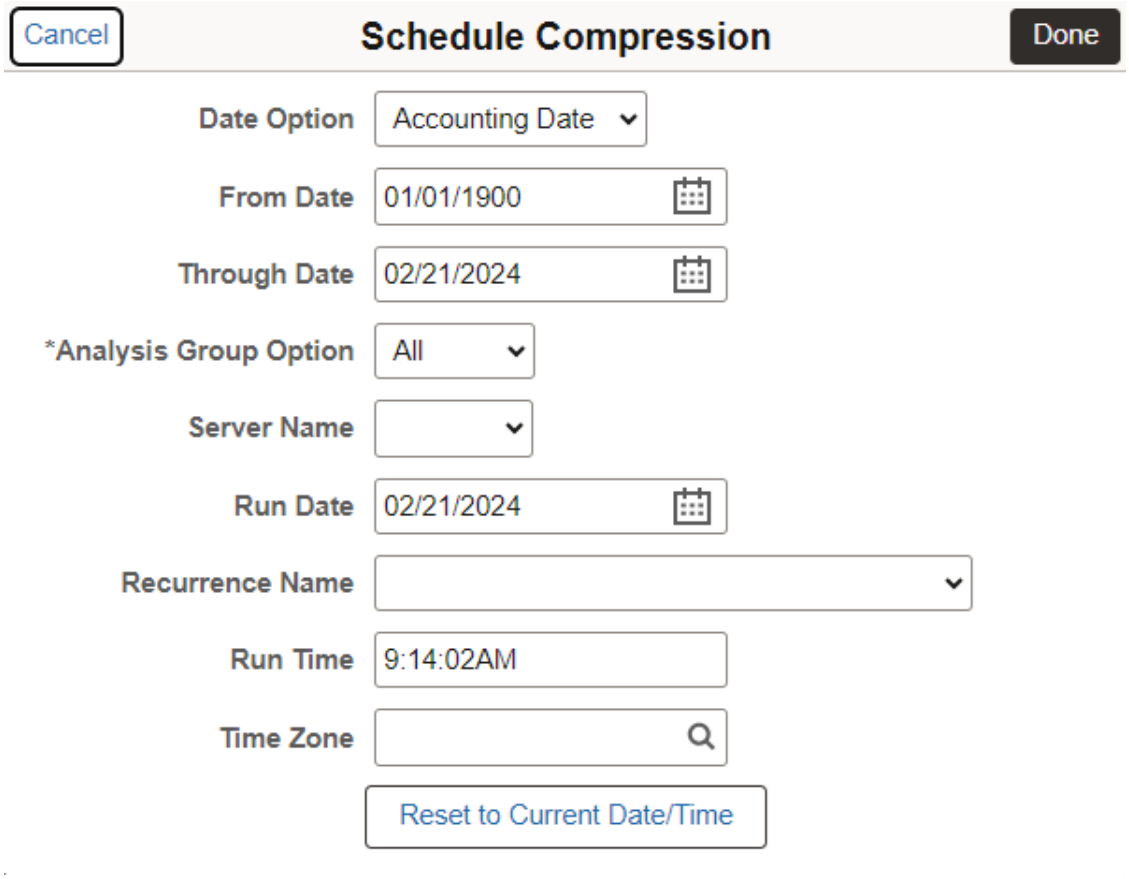

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Field or Control	Description
Actions	Select a row and click the *Actions* icon to perform the required related action. The available options are: • *Update Approval Status*: For a project to be compressed, it must have an eligible project status and must be approved. Use the Update Approval Status before compressing a project. • *Update Compression Template*: The organization's default compression template is displayed but can be changed using the Update Compression Template action. For more information, see the Project Compression Template Page topic. • *Update Project Status*: Project Status determines if a project is eligible for compression. Use the Update Project Status action to update a project's status. • *Schedule Compression*: Select to run the compression process. This page allows you to override the parameters of the default compression template. You can change the date option used for compression, compress for a different date range or specify a specific analysis group to compress. In addition, the information available on the process scheduler is available for entry, such as the run date and time. Schedule Compression is available to users who have the Compression Super User role identified on the Project Costing Installation page. For more information, see the Application Fundamentals: Installation Options - Project Costing Page topic. • *View Compression History*: Select to open the component to review compression detail from prior sessions across all projects.
Project	Displays the project ID. For security purposes, the projects displayed are filtered based on My Projects for the user logged in, with the exception of users who have the Compression Super User role on the installation options page. Users with this role will see all projects.
Description	Click for more information about the project, including the start date, project type, and manager.
Eligible for Compression	Displays the compression eligibility of the project based on project status. Displays *Yes* if the project is eligible for compression.
Approved for Compression	Displays *Yes* or *No* for projects approved or not approved for compression.

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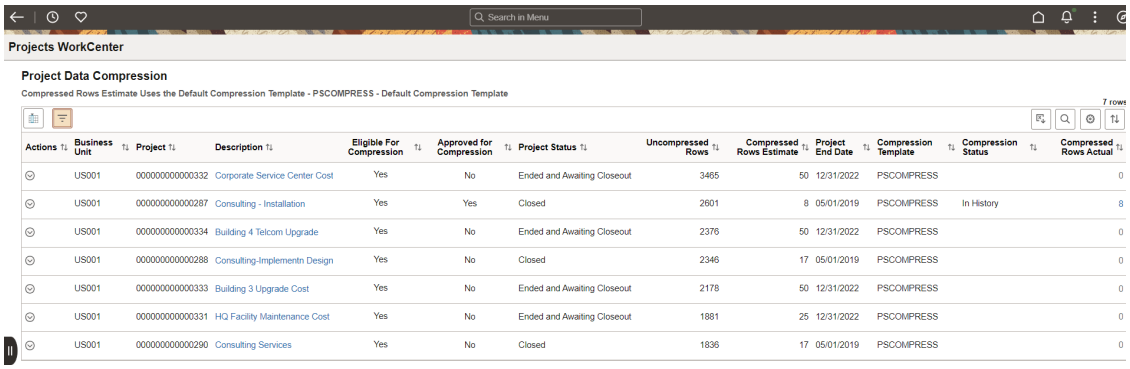
Field or Control	Description
Project Status	Displays the status of the project. For more information on project status and its impact on the eligible for compression see the Status Types Page topic.
Uncompressed Rows	Displays the number of project transaction rows that have not been compressed.
Compressed Rows estimate	Displays the estimated number of rows after compression. This estimate is based on the organization's default compression template and is not adjusted for individual projects that use a different compression template.
Project End Date	Displays the end date of the project.
Compression Template	Displays the compression template, which will be used to compress the transaction rows. The default template can be overridden.
Compression Status	Displays the compression status. Values include: • Archived • In History • Purged • Restored after Archival.
Compressed Rows Actual	Displays the number of rows after compression.

Note

The Materialised View (PC_PROJ_RES_MV) must be built using Application Designer, then enabled and refreshed using the *Enable Materialized Views* and *Maintain Materialized Views* components.

The row counts for Uncompressed Rows and Compressed Rows Estimate are based on the organization's default compression template.

This example illustrates the fields and controls on the Project Data Compression page after compression.



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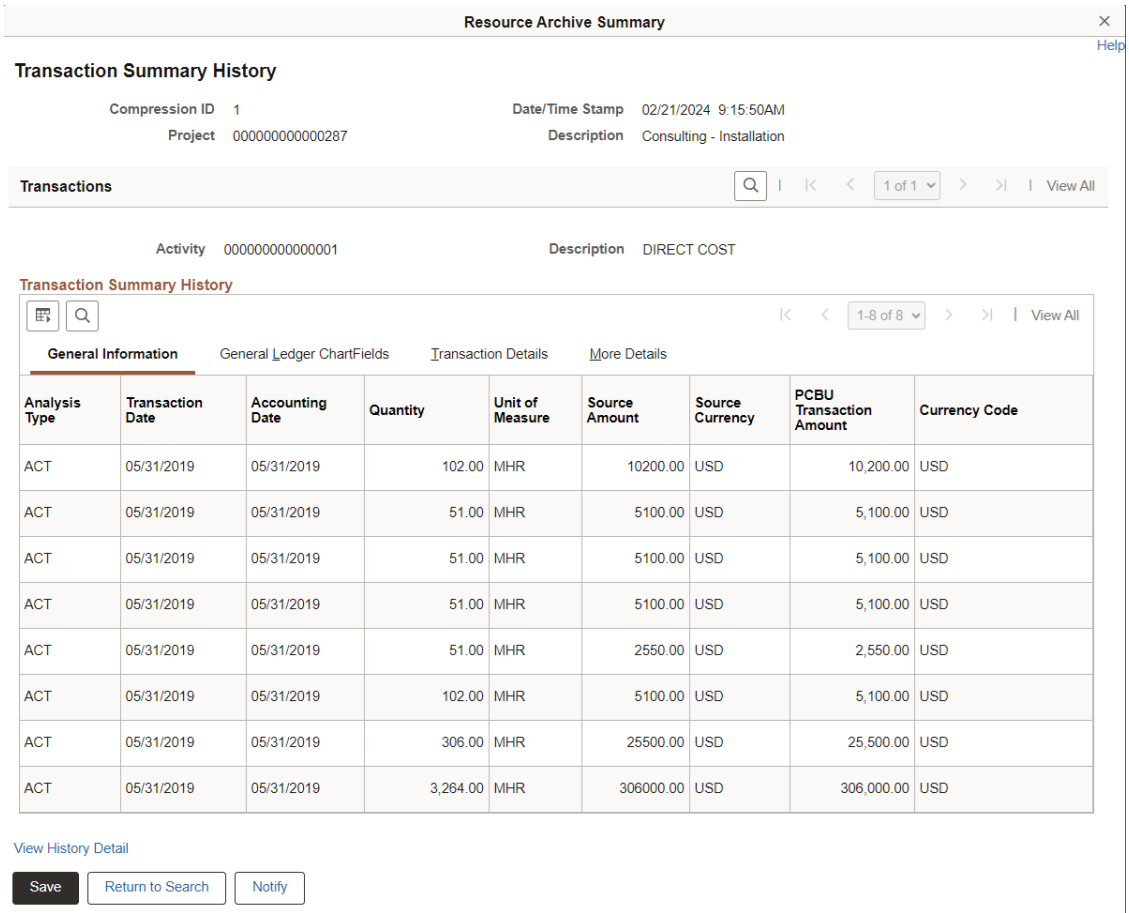
This example illustrates the fields and controls on the Resource Archive Summary page.



> **Note**
>
> The compression process can be scheduled once the project is approved for compression. If the project status is later changed to one that is not eligible for compression, it is the responsibility of the user to cancel the compression process, or it will run as scheduled.

Using the PeopleSoft Fluid Projects WorkCenter – My Insights Pagelet

Use the Projects WorkCenter – My Insights pagelet to view the Projects Insights that include Project Cost Analytics, Project Billing Analytics, Project Revenue Analytics, and Year-Over-Year Project Analytics.

Navigation:

From a Fluid Project Management homepage, select the Projects WorkCenter tile, and expand the My Insights pagelet.

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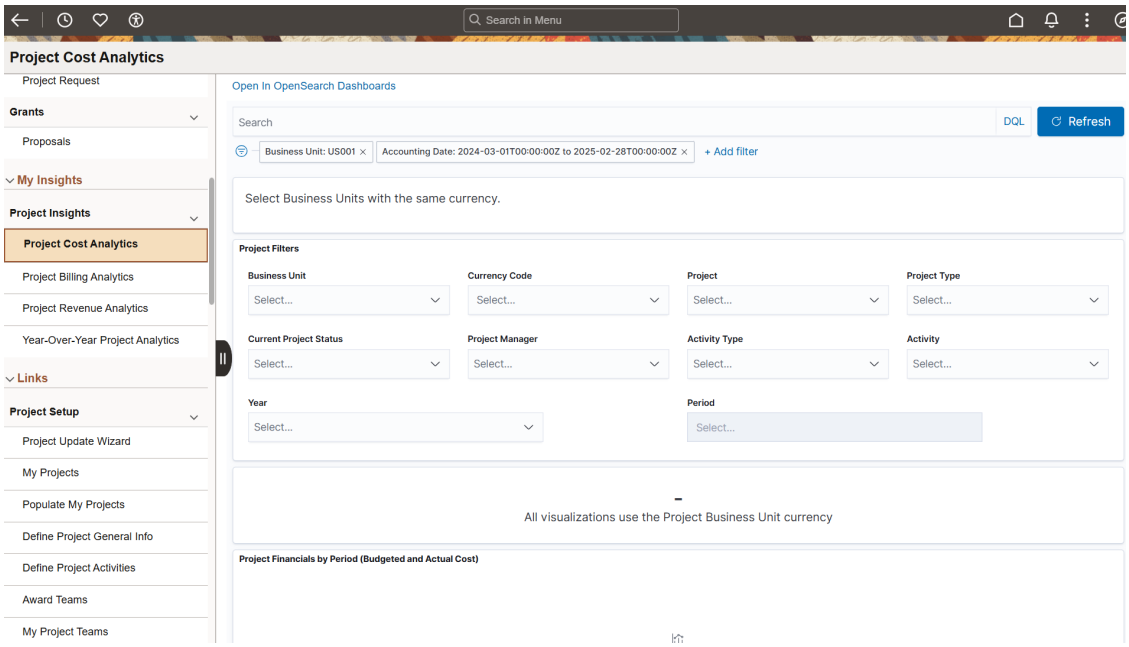
System administrators use the Enterprise Components: Configure Pagelets - My Insights Page to set up the My Insights pagelet for end users.

This example illustrates the fields and controls on the My Insights Pagelet.



For additional information on Projects Insights, see Analyzing Project Costing Information Using Insights Dashboards.

> **Note**
>
> PeopleTools version 8.61 or later is required to support access to Insights dashboards in fluid WorkCenters.

Using the Projects Update Wizard

Project administrators can use the Projects Update Wizard to update project information across the organization. As the project progresses and changes occur, you can use the Projects Update Wizard to update project and activity user fields, status, end dates, type, manager, team members and location.

The Projects Update Wizard provides users a four-step process to update project information which includes the following:

- Select Update Type
- Enter New Values
- Select Projects & Activities
- Review and Submit

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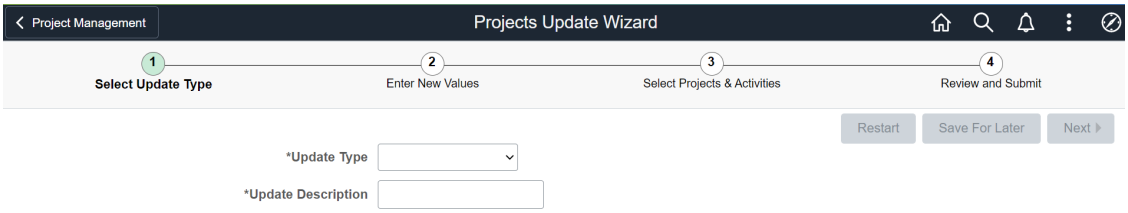
> **Note**
>
> If configured, the Projects Update Wizard complies with the PeopleTools Security and retrieves only the projects that satisfy the security setup.

Navigation

The Projects Update Wizard can be accessed as a link from within the Project WorkCenter or added as a separate tile to a homepage.

This example illustrates the fields and controls on the Projects Update Wizard tile.

This example illustrates the fields and controls on the Projects Update Wizard link.



Related Topics

- Project Definitions - General Information Page
  Use the Project Definitions - General Information page (PROJECT_GEN_01A) to create or update a project.
- Activity Definitions - General Information Page
  Use the Activity Definitions - General Information page (PROJ_ACT_DESCR) to create an activity and assign it to a project.
- Project Definitions - Manager Page
  Use the Project Definitions - Manager page (PROJECT_MGR) to view and track project managers.
- Project Definitions - Team Page
  Use the Project Definitions - Team page (PROJECT_TEAM_01) to view a list of all project team members and their project roles and schedules, add and remove project team members by using job codes, and add and remove individual project team members.

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Pages Used to Work with Projects Update Wizard

Page Name	Definition Name	Usage
Select Update Type page	PC_WC_UPDWIZ1_FL	Identify and select an update type from the available options.
Enter New Values page	PC_WC_UPDWIZ2_FL	Enter the new values to be used on the update.
Select Projects & Activities page	PC_WC_SELPA_WIZ_FL	Select projects and activities to be updated.
Review and Submit page	PC_REVIEW_WIZ_FL	Review your changes to the selected projects and activities, and submit the updates.

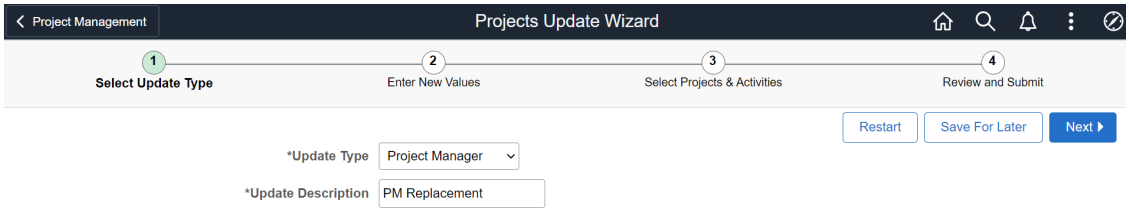
Select Update Type Page

Use the Select Update Type page (PC_WC_UPDWIZ1_FL) to identify and select an update type from the available options.

Navigation

Fluid Home page, and then **Projects Update Wizard**

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



Field or Control	Description
Update Type	Select the information to be updated. The available options are listed in alphabetical order. Options include: • Activity User Fields • End Date • Project Location • Project Manager • Project Team • Project Template Status • Project User Fields • Status • Type
Update Description	Describe the update to be processed.

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Field or Control	Description
Restart, **Save For Later**, and **Next**	These buttons are enabled after you enter the update type. • *Restart*: Click to cancel the current update and begin a new update. • *Save For Later*: Click to save your changes for a later moment. When you access the Projects Update Wizard at a later time, you can see the details of the update you already initiated, and the time and date it was saved. • *Next*: Click to navigate to the next step.

Enter New Values Page

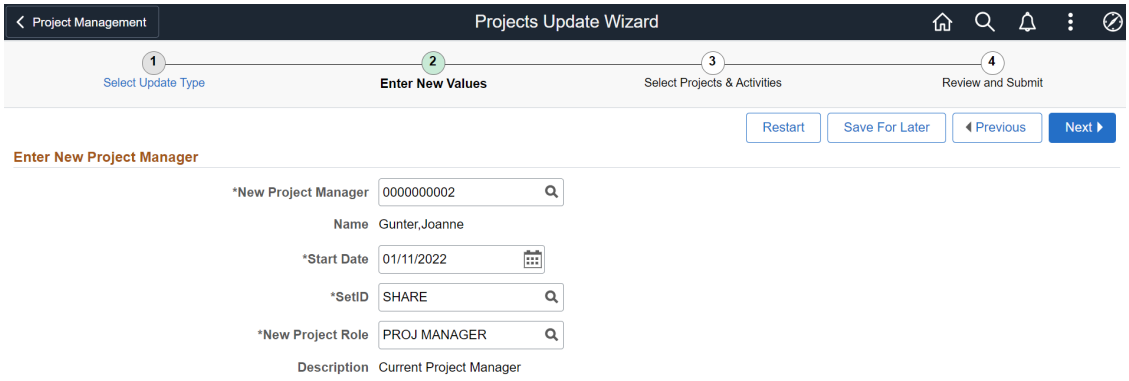
Use the Enter New Values page (PC_WC_UPDWIZ2_FL) to enter the new values to be used on the update. The information is displayed on the basis of the update type selected in the above step.

Navigation

Fluid Home page, and then **Projects Update Wizard**

After entering the update type, click the **Next** button.

This example illustrates the fields and controls on the Enter New Values page.



The information displayed on this page depends on the *Update Type* selected in the previous step. In this example, new project manager information is entered.

> **Note**
>
> For certain updates, such as the Project and Activity User Fields, you can clear an existing value, and set it to blank. When you proceed with a blank value, the system displays a message indicating that existing fields will be cleared and set to blank.You can either proceed or cancel the update.

After entering the new values, click the **Next** button to proceed to the Select Projects & Activities step.

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Select Projects & Activities Page

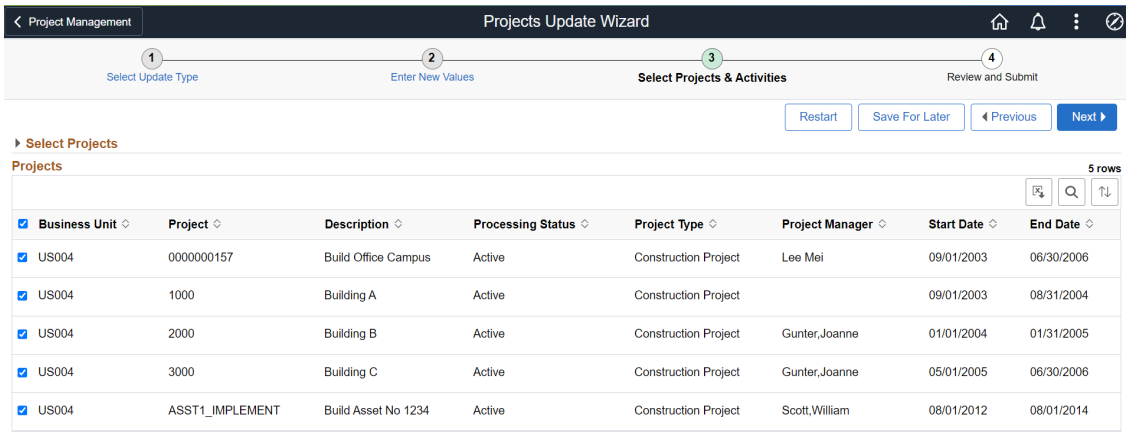
Select the Select Projects & Activities page (PC_WC_SELPA_WIZ_FL) to select projects and activities to be updated. The information displayed on this page is dependent on the update type selected in the first step. For example, if you are updating both projects and activities, you might see separate search criteria allowing you to locate specific values for the update process.

Navigation

Fluid Home page, and then **Projects Update Wizard**

After entering the new values in step 2, click the **Next** button.

This example illustrates the fields and controls on the Select Projects & Activities page.



You can search for projects by entering various search criteria. In the Projects grid, select the check boxes of the projects to be updated, and click **Next** to proceed to the Review and Submit step.

Review and Submit Page

Select the Review and Submit page (PC_REVIEW_WIZ_FL) to review your changes to the selected projects and activities, and submit the update. The information displayed on this page is dependent on the information being updated. It displays all the fields that are being updated along with other key information.

Navigation

Fluid Home page, and then **Projects Update Wizard**

After selecting the required projects and activities in the Select Projects & Activities step, click the **Next** button.

This example illustrates the fields and controls on the Review and Submit page.

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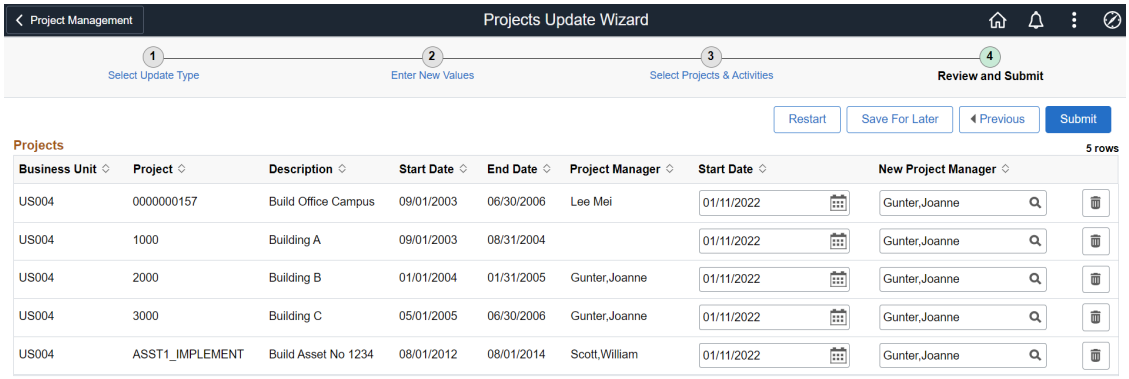
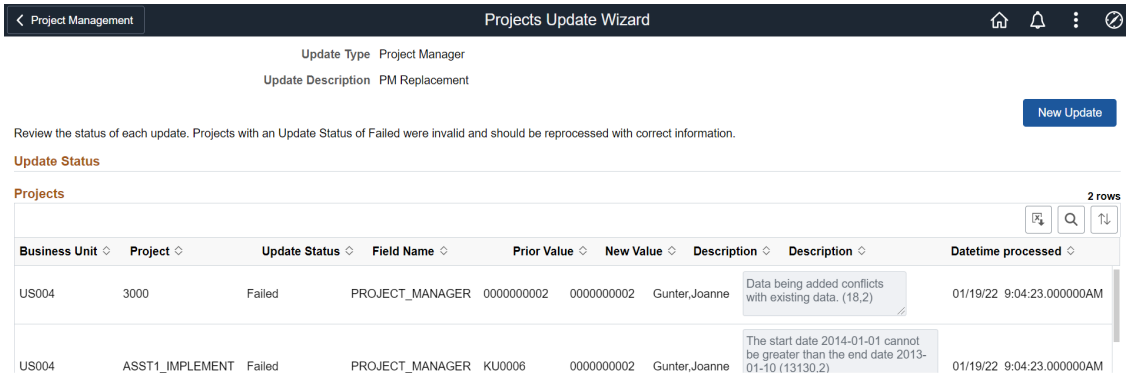


Select the **Delete** icon to remove a row from the update wizard.

The page displays both the current and new field values.You can further modify the new fields before you submit the changes. Then, click the **Submit** button.

A confirmation page displays the projects and activities updated through the process.

This example illustrates the fields and controls on the Save Confirmation page.



Field or Control	Description
Update Status	Displays the status of each field updated- *Success* or *Failed*. If the update fails, you can find information on why the update failed. You should reprocess the update with the correct information.
New Update	Click this button to return to the Select Update Type step in the Project Update Wizard, and begin a new update.

You can follow the same steps to update the other project fields.

Updating End Dates with Project Update Wizard

With Projects Update Wizard, you can update the end dates of projects, activities, and project teams.

Perform the following steps to update project end dates:

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Step 1: Select Update Type

Select the update type as *End Date*, enter a description, and go to the next step.

Step 2: Enter New Values

Select to update the end dates for a project, activity, or project team.

> **Note**
>
> If you have installed both *Program Management* and *Resource Management* products, the **Project Team End Dates** field does not display.

Step 3: Select Projects & Activities

In this step, you can search for projects, project activities, and project team to update the end dates. In most cases, the end dates of these three items will be updated in the same action, whereas in other cases,only a subset of dates will be updated.

For added flexibility, the search fields in the Search Project, Search Project Activities, and Search Project Team tabs are independent. In many cases, the user will search for project information on the Search Project tab first.

> **Note**
>
> To ensure that the project search fields are consistent across all the tabs, the projects fields should be entered first on the Search Projects tab. These fields will default to the Search Project Activities and Search Project Team tabs as long as those tabs do not already have search criteria. If the Search Project Activities and Search Project Team tabs have search criteria, use the **Clear** button to remove them before updating the Search Project tab. Changes to any of the search fields in the Search Project Activities and Search Project Teams tabs will not be copied to the other tabs.

Step 4: Review and Submit

Review the projects, activities, project team details, and the new end date that you have selected.

> **Note**
>
> You cannot select a project end date earlier than the project activity end date. Similarly, you cannot select an activity end date later than the project end date.

Updating Project Location with Projects Update Wizard

With Projects Update Wizard, you can update project locations.

Perform the following steps to update project locations:

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Step 1: Select Update Type

Select the update type as *Project Location*, enter a description, and go to the next step.

Step 2: Enter New Values

Select a set ID, effective date, and the new project location. The location prompt displays values based on the set ID.

Step 3: Select Projects & Activities

Search for projects, select the required ones, and proceed to the next step.

Step 4: Review and Submit

Review the project location changes. The effective date must be a date within the project start date and end date. If not, the system displays an error message. Correct the error and proceed with submission.

Updating Project Manager with the Projects Update Wizard

With Projects Update Wizard, you can update the project manager on a project.This update is not available if both the *Program Management* and *Resource Management* products are installed.

Perform the following steps to update project managers:

Step 1: Select Update Type

Select the update type as *Project Manager*, enter a description, and go to the next step.

Step 2: Enter New Values

Select the project manager, enter the start date, set ID, and project role details. Proceed to the next step.

Step 3: Select Projects & Activities

Search for projects, select projects, and proceed to the next step. The BU prompt displays values based on the set ID selected in step 2.

Step 4: Review and Submit

Review your changes. Ensure that the start date of the manager is within the start and end dates of the project. Click the **Submit** button to complete the update process.

Updating Project Template Status with the Projects Update Wizard

With Projects Update Wizard, you can update project template status en masse.

Perform the following steps to update project template status:

Step 1: Select Update Type

Select the update type as *Project Template Status*, enter a description, and go to the next step.

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Step 2: Enter New Values

Select the *New Template Status* option. You can set the status as *Active* or *Inactive*.

Go to the next step.

Step 3: Select Projects & Activities

A set of project level search criteria is available to identify one or multiple projects. Only project templates are displayed.

Select the projects and proceed.

Step 4: Review and Submit

The status entered in Step 2 defaults to the page, but can be changed to another status. This provides the user the option to update some templates to a different status using the *New Template Status* option and leave some in the current status.

Review the field changes and submit them.

Updating Project User Fields with the Projects Update Wizard

With Projects Update Wizard, you can update project user fields.

Perform the following steps to update project user fields:

Step 1: Select Update Type

Select the update type as *Project User Fields*, enter a description, and go to the next step.

Step 2: Enter New Values

The page displays a list of fields available for update. You can also remove an existing value and leave the field blank.

Go to the next step.

Step 3: Select Projects & Activities

Select the projects and proceed.

Step 4: Review and Submit

Review the field changes and submit them.

Updating Status with the Projects Update Wizard

With Projects Update Wizard, you can update project status.

Perform the following steps to update project status:

Step 1: Select Update Type

Select the update type as *Status*, enter a description, and go to the next step.

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Step 2: Enter New Values

Select the *Update Project Status* or *Update Activity Status* option, or both. Enter set ID, effective date, and new statuses in the respective fields.

After entering all the details, proceed to the next step.

Step 3: Select Projects & Activities

In this step, you can search for the projects and the activities to be updated. The BU prompt displays values based on the set ID selected in the Enter New Values step. If the Update Project Status control is in use, the project and activities will be displayed for selection on the basis of the new project status selected in step 2. The same condition applies if the activity status control is in use.

Step 4: Review and Submit

Submit the changes after making the status updates.

> **Note**
>
> Project Templates are not available for the status update.

Updating Type with the Projects Update Wizard

With Projects Update Wizard, you can update project and activity types.

Perform the following steps to update project and activity types:

Step 1: Select Update Type

Select the update type as *Type*, enter a description, and proceed to the next step.

Step 2: Enter New Values

You can update project and activity types. You can also remove an existing value and leave the field blank.

Step 3: Select Projects & Activities

Search for projects and activities to be updated.

Step 4: Review and Submit

Review the modifications and submit them.

Updating Project Team with the Projects Update Wizard

With Projects Update Wizard, you can update project teams by adding one or more team members. The Project Team update type should not be used to add Project Managers. Project Managers have their own update type.

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> **Note**
>
> The Project Team Update Type is not available when both Program Management and Resource Management products are installed.

Perform the following steps to update project teams:

Step 1: Select Update Type

Select the update type as *Project Team*, enter a description, and proceed to the next step.

Step 2: Enter New Values

You can update project teams. You can add one or more team members to the project.

Step 3: Select Projects & Activities

Search for projects to be added.

Step 4: Review and Submit

Review the modifications and submit them. The Schedule Start Date and End Date default to the Project Start Date and End Date. You can change the Schedule Start Date and End Date but ensure the new dates are between the Project Start Date and End Date.

> **Note**
>
> If there are multiple schedules for the project resource, the resource is always added to the latest schedule.

Using Work Management in the Projects WorkCenter

The PeopleSoft Fluid Projects WorkCenter can optionally use the Work Management Framework, which is an Enterprise Components feature.

This topic discusses how to setup up Work Management for the Projects WorkCenter and provides an example for one delivered Setup and Maintenance Exception: Missing Project Fields.

Understanding Work Management in the Projects WorkCenter

The purpose of the Work Management Framework is to view and manage exception transactions when they appear in the My Work section of the WorkCenter.

It is important to understand the Work Management Framework from a high-level perspective before applying it to PeopleSoft Project Costing. Please review Enterprise Components: Understanding the Work Management Framework prior to reading the following information.

The Work Management Framework provides actions and filters to My Work pagelets to assist users with managing a large list of transactions. Users may assign a specific transaction to themselves, defer the transaction for follow-up to a later date, or mark a transaction as not an exception (inactive). Filters allow the user to view transactions not yet assigned to anyone,

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transactions assigned to themselves, inactive transactions, or a full list of all transactions. You can also view a history of actions taken on the transaction.

Setting Up Work Management for the Projects WorkCenter

This list provides the steps to setup the optional Work Management feature for the Projects WorkCenter:

1. Use the EOXC_USER role access the Work Management setup pages.
2. Access the Enterprise Components: Work Management Link ID's Page.
3. Search for Link ID corresponding to the My Work section for Projects WorkCenter where you want to use the Work Management feature.

   Link IDs corresponding Projects WorkCenter - My Work, Setup and Maintenance Exceptions are:

Link ID	Description
PC_ACTIVE_PAST_PROJECT	Expired Projects with Active Status
PC_MISSING_PRJ_FLDS	Missing Project Fields
PC_MISSING_PRJ_USRFLD	Missing Project User Fields
PC_MISSING_PRJ_MGRS	Missing and Inactive Project Managers
PC_INACTIVE_PRJ_EMPL	Inactive Project Team Members

   Link IDs corresponding Projects WorkCenter - My Work, Recurring Tasks are:

Link ID	Description
PC_WC_MASS_BP_FINALIZE	Budgets to Finalize
PC_WC_DEF_ROWS	Deferred Billing
PC_PRJ_COMPRESS	Project Data Compression

4. Select the **View** button to access the Enterprise Components: Enable Work Mgmt Exception Page.
5. Select the **Enable** option to activate the Work Management feature for that Link ID.
6. Follow instructions in the Enterprise Components documentation for the Enterprise Components: Enable Work Mgmt Exception Page to complete your setup.

Pages Used to Manage Work in the Projects WorkCenter

Page Name	Definition Name	Usage
Projects WorkCenter Page - Missing Project Fields (Work Management Enabled)	PC_WC_PRJ_FL	Access and manage projects with missing location and type.

Projects WorkCenter Page - Missing Project Fields (Work Management Enabled)

Use the Projects WorkCenter page when Work Management is enabled to access and manage a list of projects with blank location or project type.

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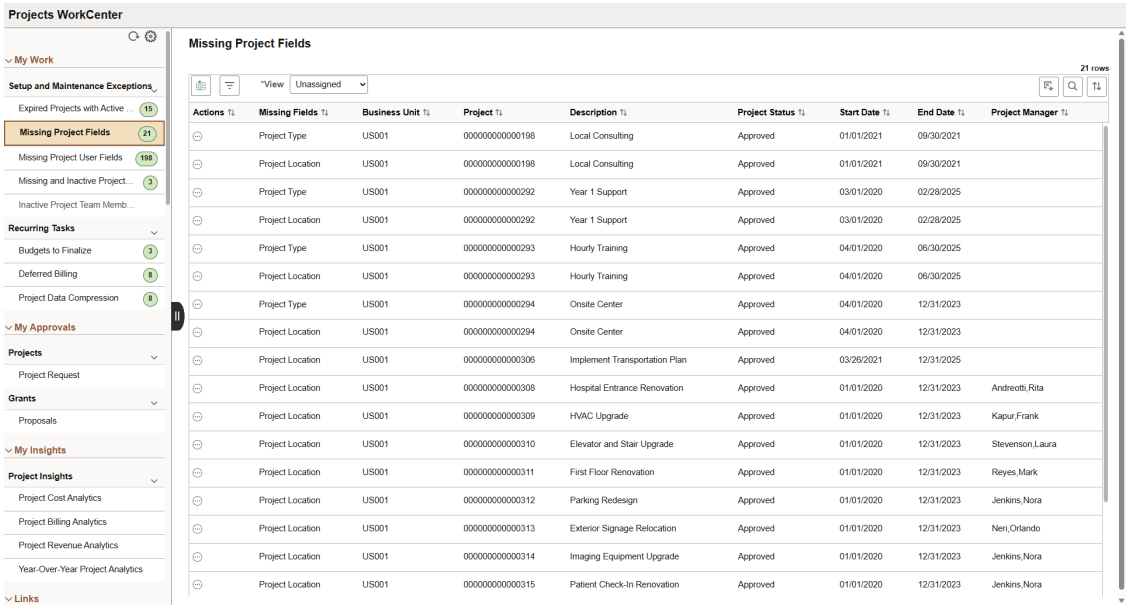
Navigation: **Project Management**, and then **Projects WorkCenter (Tile)**.

This example illustrates the fields and controls on the Projects WorkCenter - Missing Project Fields page when using Work Management.



When Work Management is enabled for an exception, there are two changes on the WorkCenter page:

- The **View** drop-down box appears above the grid.
- Additional action options are added to the **Actions** button.

The actions for Missing project Fields are **Update project Type** and **Open Project**. When Work Management is enabled, additional actions are available depending on the option selected in the **View** field: See Enterprise Components: Understanding the Work Management Framework, Actions by View section.

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Setting Up and Using the PeopleSoft Fluid User Interface for Project Management

Setting Up the PeopleSoft Fluid User Interface for Project Management

Pages Used to Set Up the PeopleSoft Fluid User Interface for Project Management

Page Name	Definition Name	Usage
Reporting Options - Reporting Groups Page	PC_PM_RPT_SETUP	Use this page to determine how charts are displayed for Project Profit Margin, Contract Profit Margin, and Unbilled Cost WIP (work in progress).
Reporting Options - Timesheet Periods Page	PC_PM_RPT_SETUP2	Use this page to determine the number of prior periods to use when the Project Timesheets Due page is displayed.
My Preferences - Project Team Resources Page	PC_MYPREF_FL	Determine whether to include project team resources that have a completed status on PeopleSoft Fluid pages.
My Preferences - Project Timesheets Due Page	PC_MYPREF_FL	Determine the number of timesheet periods to view.
My Preferences - Report Business Unit Page	PC_MYPREF_FL	Determine the reporting business unit.
My Preferences - Resource Locator Page	PC_MYPREF_FL	Determine search preferences when using the resource locator.
My Preferences - Status Reports Page	PC_MYPREF_FL	Determine the number of past weeks to display when viewing status reports.

See Project Management with the PeopleSoft Fluid User Interface .

Travel Authorizations Tile

The Travel Authorization tile can be placed on any homepage and alerts you to the total number of requests that have not been submitted.

This example illustrates the Travel Authorizations Tile.

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Reporting Options - Reporting Groups Page

Use the Reporting Options - Reporting Groups page (PC_PM_RPT_SETUP) to determine how charts are displayed for Project Profit Margin, Contract Profit Margin, and Unbilled Cost WIP (work in progress).

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Reporting Options**

This example illustrates the fields and controls on the Reporting Options - Reporting Groups page.

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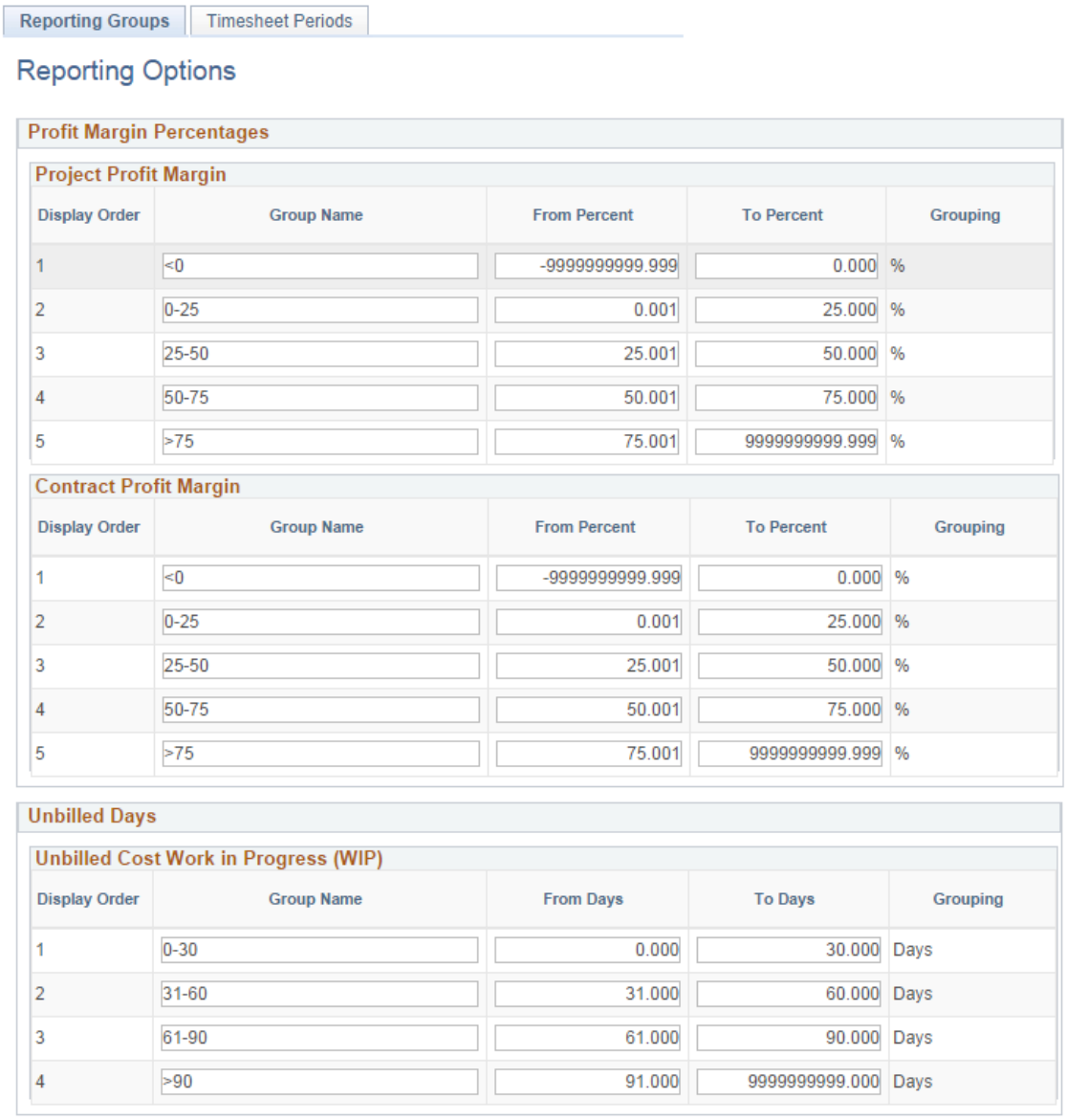

Reporting Groups | Timesheet Periods

Reporting Options

Profit Margin Percentages

Project Profit Margin

Display Order	Group Name	From Percent	To Percent	Grouping
1	<0	-9999999999.999	0.000	%
2	0-25	0.001	25.000	%
3	25-50	25.001	50.000	%
4	50-75	50.001	75.000	%
5	>75	75.001	9999999999.999	%

Contract Profit Margin

Display Order	Group Name	From Percent	To Percent	Grouping
1	<0	-9999999999.999	0.000	%
2	0-25	0.001	25.000	%
3	25-50	25.001	50.000	%
4	50-75	50.001	75.000	%
5	>75	75.001	9999999999.999	%

Unbilled Days

Unbilled Cost Work in Progress (WIP)

Display Order	Group Name	From Days	To Days	Grouping
1	0-30	0.000	30.000	Days
2	31-60	31.000	60.000	Days
3	61-90	61.000	90.000	Days
4	>90	91.000	9999999999.000	Days

Use this page to determine group names and ranges that appear on the Project Profit Margin (pivot) Page, Contract Profit Margin (pivot) Page, and the Project Unbilled Cost WIP (pivot) Page. You can create zero to five ranges.

Field or Control	Description
Group Name	Enter text that appears for each bar of the Gantt chart for the page.
From Percent, **To Percent**, **From Days**, and **To Days**	Enter a range that defines the range for the group name. **Note:** Be sure to not overlap ranges.
Grouping	Displays % (percent) or *Days* on the page, depending on which section you are in.

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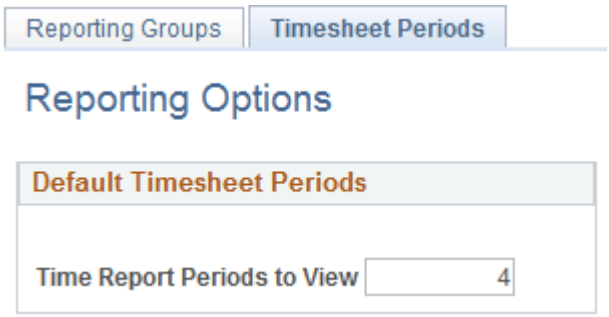
Reporting Options - Timesheet Periods Page

Use the Reporting Options - Timesheet Periods page (PC_PM_RPT_SETUP2) to determine the number of prior periods to use when the Project Timesheets Due page is displayed.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Project Costing**, and then **General Options**, and then **Setup PC Reporting Options**, and then **Timesheet Periods**

This example illustrates the fields and controls on the Reporting Options - Timesheet Periods page.



Field or Control	Description
Time Report Periods to View	Enter the number of prior periods to display when viewing the Project Timesheets Due (pivot) Page. The periods are determined by the Time Report Period field of the PeopleSoft Expenses: Expenses Definition - Business Unit 2 Page for PeopleSoft Expenses. This default value can be overridden on the My Preferences - Project Timesheets Due Page.

My Preferences - Project Team Resources Page

Use the My Preferences - Project Team Resources page (PC_MYPREF_FL) to determine whether to include project team resources that have a completed status on PeopleSoft Fluid pages.

Navigation:

Fluid Home, and then **Employee Self Service**, and then **My Preferences**, and then **Project Management**, and then **Project Team Resources**

This example illustrates the fields and controls on the My Preferences - Project Team Resources page.

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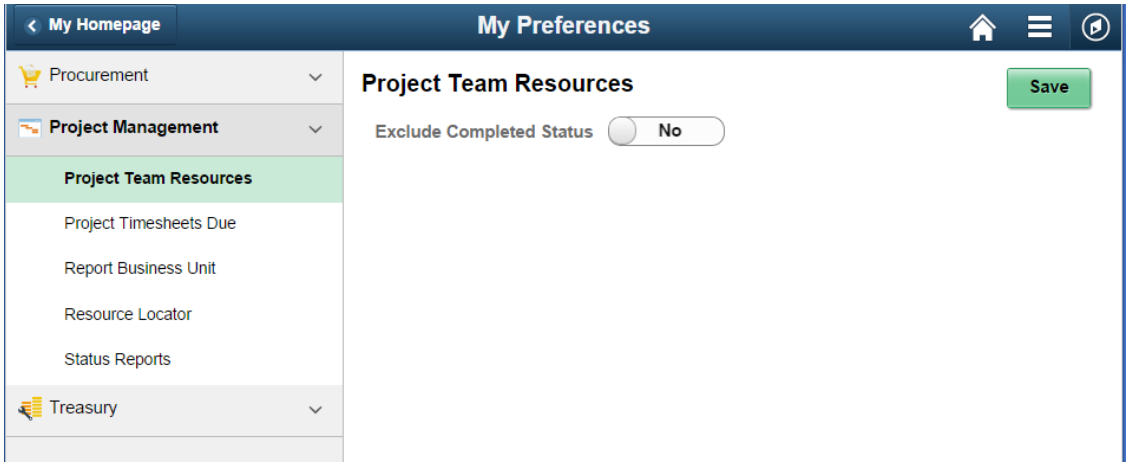


Field or Control	Description
Exclude Completed Status	Select to exclude resources that have a *Completed* status on the project team. The system automatically excludes resources that have a *Rejected* and *Cancelled* status.

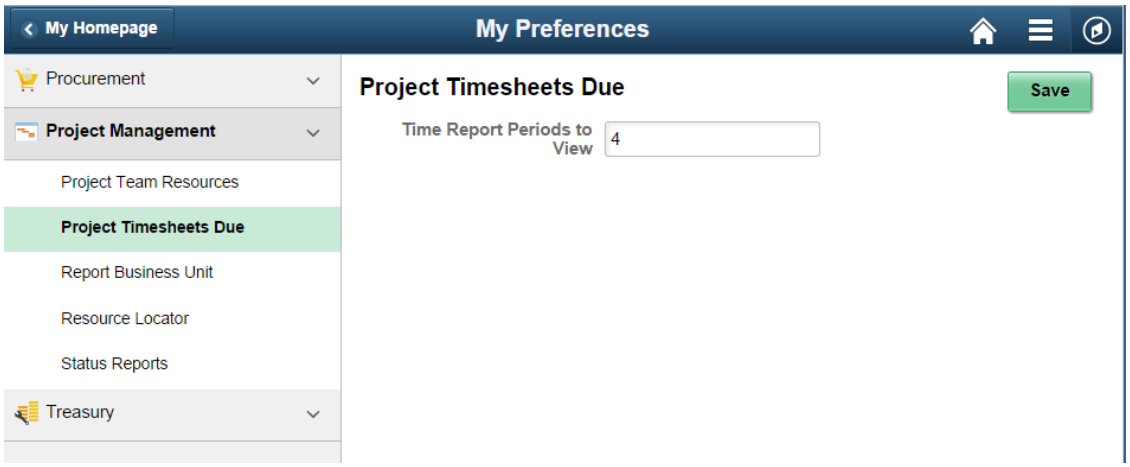
My Preferences - Project Timesheets Due Page

Use the My Preferences - Project Timesheets Due page (PC_MYPREF_FL) to determine the number of timesheet periods to view when viewing time reports.

Navigation:

Fluid Home, and then **Employee Self Service**, and then **My Preferences**, and then **Project Management**, and then **Project Timesheets Due**

This example illustrates the fields and controls on the My Preferences - Project Timesheets Due page.



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Field or Control	Description
Time Report Periods to View	Enter the number of prior timesheet periods to consider when viewing the Project Timesheets Due (pivot) Page.

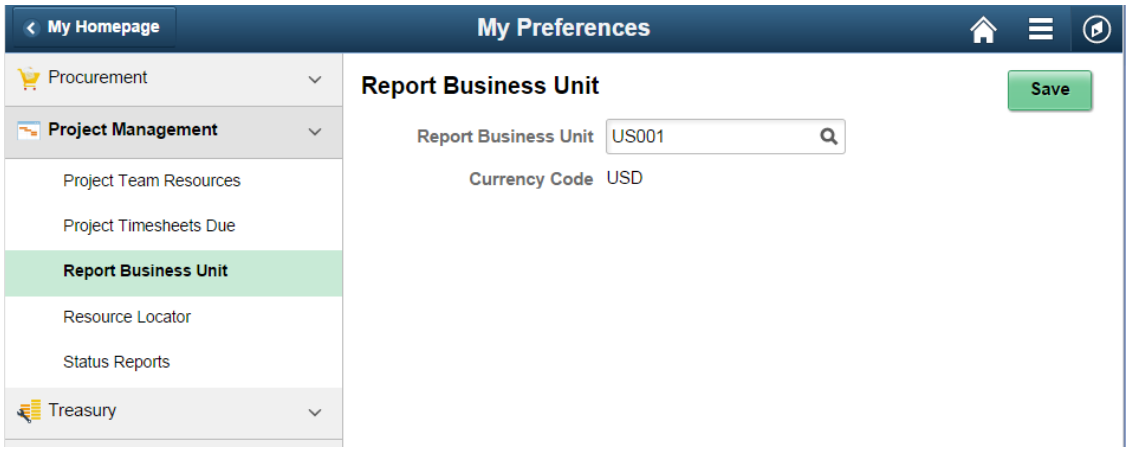
My Preferences - Report Business Unit Page

Use the My Preferences - Report Business Unit page (PC_MYPREF_FL) to determine the reporting business unit.

Navigation:

Fluid Home, and then **Employee Self Service**, and then **My Preferences**, and then **Project Management**, and then **Report Business Units**

This example illustrates the fields and controls on the My Preferences - Report Business Unit page.



Field or Control	Description
Report Business Unit	Select the business unit that you want to use when viewing the Project Financials (pivot) Page and the Project Unbilled Cost WIP (pivot) Page.
Currency Code	Displays the currency code of the business unit entered.

My Preferences - Resource Locator Page

Use the My Preferences - Resource Locator page (PC_MYPREF_FL) to determine search parameters when using the resource locator.

Navigation:

Fluid Home, and then **Employee Self Service**, and then **My Preferences**, and then **Project Management**, and then **Resource Locator**

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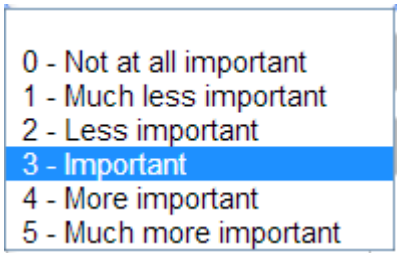
This example illustrates the fields and controls on the My Preferences - Resource Locator page.

Enter a value that is used by the system when searching for resources. Values for the drop down list boxes are:

This example illustrates the options when clicking on the drop down menu option for Availability Importance, Qualifications Importance, and Preferences Importance:



Use this page to change PeopleSoft Resource Management defaults that are initially entered on the PeopleSoft Resource Management: Express Search Page.

Field or Control	Description
Availability Importance, Qualifications Importance, and **Preferences Importance**	Assign the relative priorities to the **Availability, Preferences,** and **Qualifications** factor family fit scores for this search session.
Maximum Number of Candidates	Enter a number that determines the number of rows that appear when performing a resource search on the Resource Locator Page. The initial default value is *5.* Once you change the value, your most recent selection persists. The maximum value for this field is *50.*

My Preferences - Status Reports Page

Use the My Preferences - Status Reports page (PC_MYPREF_FL) to determine your preference when viewing status reports.

Navigation:

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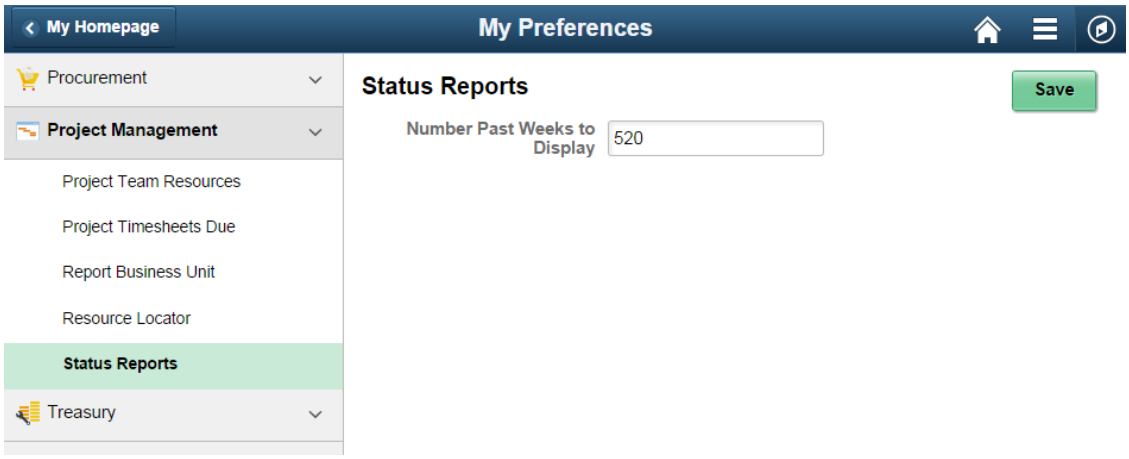
Fluid Home, and then **Employee Self Service**, and then **My Preferences**, and then **Project Management**, and then **Status Reports**

This example illustrates the fields and controls on the My Preferences - Status Reports page.



Field or Control	Description
Number of Past Weeks to Display	Enter a number that determines how many weeks, in the past, that the system should display when viewing the Project Status Reports Page (pivot) and the Project Status Reports Page.

Using the PeopleSoft Fluid User Interface for Project Management

Understanding PeopleSoft Fluid User Interface for Financials and Supply Chain Management

Oracle's PeopleSoft has two user interfaces:

- PeopleSoft Classic User Interface, which was designed to be used on a laptop and desktop.

  This interface was previously known as PIA (PeopleSoft Internet Architecture).
- PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop.

  The PeopleSoft application reads the type of device you are using and renders the page accordingly. However, some pages are not designed for smart phones at this time.

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Fluid User Interface Developer's Guide*.
- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.

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Pages Used with the PeopleSoft User Interface for Project Management

Page Name	Definition Name	Usage
Refresh Reporting Tables Page	PC_SUM_PR	Use this page to run the process that summarizes project resources.
Populate My Projects Page	RUN_PC_MY_PRJ	Use this page to automatically update the My Projects page for all Project Costing users based on the Default Auto Population Options at the installation level or the My Projects Options at the user preferences level. **Important:** This process must be run on a regular basis to keep all tiles and pages current for Project Management fluid pages.
Project Management Home Page	(none)	Use this page view project statistics and access additional pages.

Common Elements Used with PeopleSoft Fluid User Interface for Financials and Supply Chain Management

A banner appears at the top of every PeopleSoft Fluid page, includes the page label, and these standard buttons

Field or Control	Description
(Actions List button)	Select the Actions List button to see a list of available actions for the current window. Access pages to personalize window content or sign out.
(Home button)	Select the Home button to return to the main PeopleSoft Home page.
(NavBar button)	Select the NavBar button to expand the NavBar window, where you can select window content from options, such as Recent Places, My Favorites, Navigator, My Preferences, and Fluid Home. Select again to collapse the NavBar window.
(Notifications button)	Select the Notifications button to view actions and alerts in a notifications window.
(Personalize NavBar icon)	Select Personalize NavBar to access the personalization window, where you can add and remove selected tiles from the NavBar.
(Related Actions icon)	Select Related Actions to view available related actions.

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Field or Control	Description
(Expand Pane)	Select to expand a pane. The pane may contain tabs that you can select to view detailed information.
(Show Filters icon)	Select Show Filters to open a pane that displays filters. Filters can be used to reduce the number of records in the results section.

Common Elements Used with PeopleSoft Fluid for Project Management

Field or Control	Description
(options menu icon)	Click the Options Menu icon to open additional options for the page. Specific options are described for each page below.
(chart options icons)	Select an option to view the data as a vertical bar chart, line chart, pie chart, or horizontal bar chart.
(view result options icons)	Select an option to view the results as a grid or a list.
(related actions icon)	Select the Related Actions icon to view and perform additional transactions. Specific actions are described for each page below.
(show filters icon)	Click the Show Filters icon to open a right side panel that allows you to select specific facets on which to search. Facet values depend on the type of search.

Project Management Home Page

Use the Project Management home page to view project statistics and access additional pages.

Navigation:

Fluid Home, and then **Project Management**

This example illustrates the tiles on the Project Management home page.

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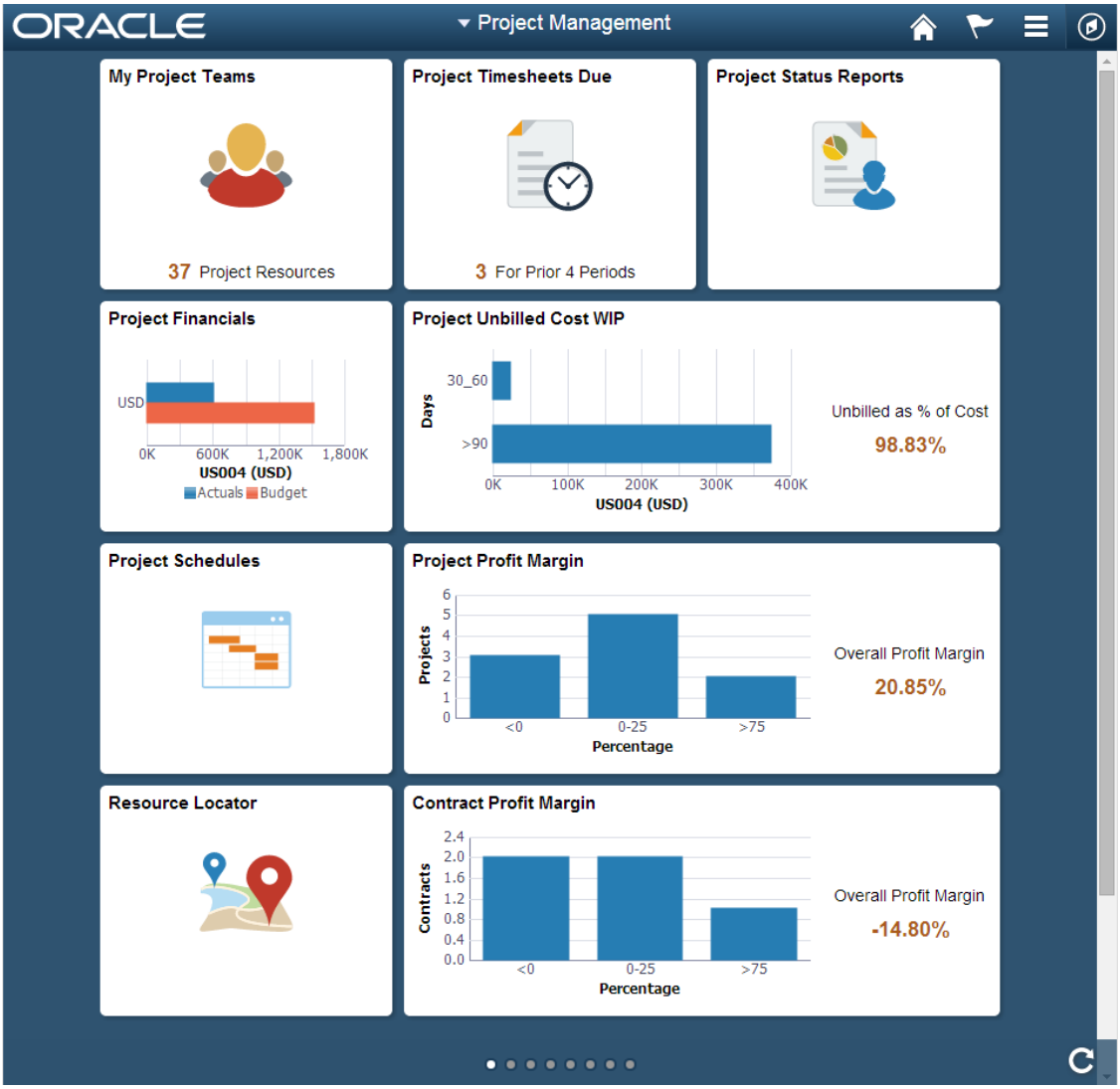

Use this page to view high-level information that is shown on each tile. You can also access PeopleSoft Fluid pages by clicking or tapping each tile.

> **Note**
>
> The projects that are available on your Projects List Page determines which projects and values are displayed.

Field or Control	Description
My Project Teams	Displays the number of unique resources that are assigned to the projects that appear on your Projects List page. Click this tile to access the My Project Teams (pivot) Page.

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Field or Control	Description
Project Timesheets Due	Displays the number of timesheets that are due from resources on your projects list, based on the number of periods specified on the My Preferences - Project Timesheets Due Page. Click this tile to access the Project Timesheets Due (pivot) Page.
Project Status Reports	Displays status reports for the resources on your projects list. Click this tile to access the Project Status Reports Page (pivot).
Project Financials	Displays a horizontal bar chart of the actual versus the budget amount for all projects that appear on your Projects List page and are limited to the business unit and currency specified on the My Preferences - Report Business Unit Page. Click this tile to access the Project Financials (pivot) Page.
Project Unbilled Cost WIP (project unbilled cost work in progress)	Displays the cost of projects that have not been billed based on the values specified on the Reporting Options - Reporting Groups Page. The system calculates this percentage based on actual costs that do not have a status of W (worksheet) or D (distributed) to Billing. Click this tile to access the Project Unbilled Cost WIP (pivot) Page.
Project Schedules	Click this tile to access the Project Schedules Page.
Project Profit Margin	Displays project profit margin groupings based on the values specified on the Reporting Options - Reporting Groups Page. Click this tile to access the Project Profit Margin (pivot) Page.
Resource Locator	Click this tile to access the Resource Locator Page.
Contract Profit Margin	Displays contract profit margin groupings based on the values specified on the Reporting Options - Reporting Groups Page. Click this tile to access the Contract Profit Margin (pivot) Page.
Proj Data Compression	Click this tile to access the Reviewing Project Data Compression Using PeopleSoft Fluid page.

Simplified Project Analytics

Simplified Analytics in the Project Costing enable project managers to compare metrics among the projects. With Simplified Analytics, users can create, customize and save analytic reports, and drill down to detailed information.

Simplified Analytics enables:

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- End users of a fluid application page to create contextual analytic reports. They can create their own reports based on the pre-defined templates by selecting the fields, filling the prompt fields, defining the layout, and selecting different types of visualizations.
- Administrator or super user to create and publish reports (based on the configured base templates) to all users of the component.
- End users to add a saved analytic report to the home page and view later.

> **Note**
>
> To enable Simplified Analytics for a component, application developers or business administrators have to associate one or more Pivot Grid models (or base templates) to a component. They can also map page fields to the prompts that are associated with the template model to define the required context.
>
> The Simplified Analytics feature is only available for fluid components in PeopleTools 8.55. This feature must be enabled for fluid components before users can use the Simplified Analytics Wizard to create and view analytic reports.

Simplified Analytic Name	Pivot Grid Model Name	Usage
Budget Vs Actual	PC_BUD_VS_ACT_CRRNT_PERIOD_SA	Allows the user to view the Cost Budget, Actual Budget, Cost Variance, Revenue Budget, and Revenue for a given Budget Period.
Budgets Not Finalized	PC_MY_UNPOST_BD_SA	Allows the user to view project budget information for budget plans that have not been finalized to Commitment Control (if the budget is for a Commitment Control ledger group), or Projects (if it is a Project Costing-only budget).
Closed Projects with Assets	PC_CLOSE_PRJ_ASSET_PVG_SA	Allows the user to view projects that have a processing status of Closed and have an asset associated with the project that is in an Open status.
Financial Summary	PC_FIN_SUM_LIFE_TO_DATE_SA	Allows the user to view the Cost Budget, Actual Budget, Cost Variance, Revenue Budget, and Revenue for the entire life of a project.
Project Unbilled Cost WIP	PC_UNBILLED_COST_WIP_FL_SA	Allows the user to view project costs that have not been billed or are work in progress for your projects.

Enabling/Disabling Simplified Analytics in Project Analytics

For Simplified Analytics, pivot grids must be assigned to a component. A pivot grid attached to a component forms the base of a Simplified Analytic.

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> **Note**
>
> Simplified Analytics is not available in small form factor (SFF).

Use the Assign Related Content (PTCS_SERVICECFG) page to enable/disable Simplified Analytics in the Project Analytics.

Navigation:

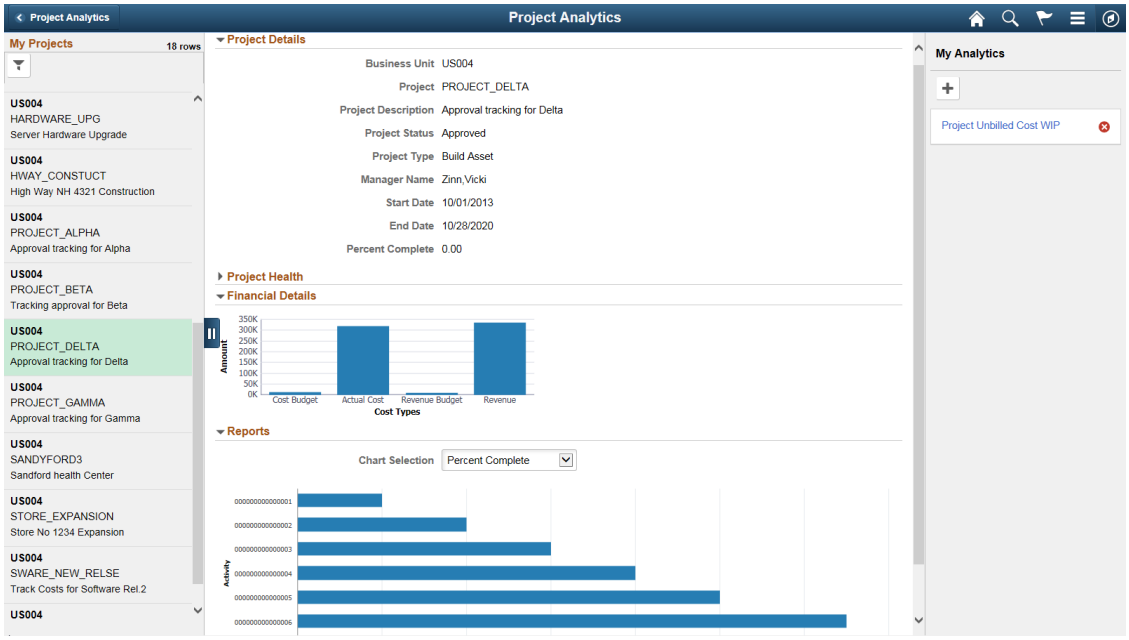
PeopleTools, and then **Portal** , and then **Related Content Service**, and then **Manage Related Content Service**

Search for Project Analytics and then click Edit. Verify if the Enable check box is selected for the Simplified Analytics.

Select/Deselect the Enable check box to enable/disable Simplified Analytics.

When Simplified Analytics is assigned to a component and enabled, the My Analytics panel is displayed on the right side of the component.

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



Use the **My Analytics** panel to create, edit, or view the analytic reports in the Project Analytics.

Create Analytics Wizard - Step 1

Use the Create Analytics Wizard - step 1 to specify the names of the analytic reports, select the analytic report template and select the display options that will be used to create the analytic report.

This example illustrates how to create an analytic report for Budget Vs. Actual. You can follow these steps to create other analytic reports.

Navigation:

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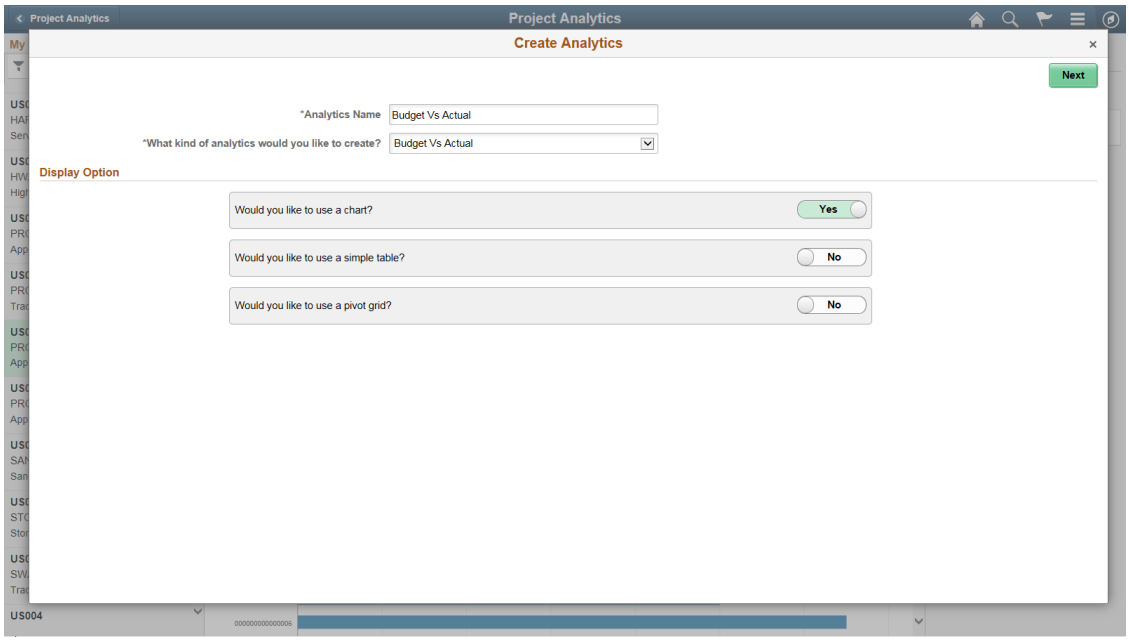
Select the **+** button to create a new Analytic.

This example illustrates the fields and controls on the Create Analytics Wizard - Step 1 (Budget Vs. Actual). You can find definitions for the fields and controls later on this page.



Term	Definition
Analytics Name	Enter a name for the analytic report.
What kind of analytics would you like to create?	Displays the available analytic templates that are used to create the analytic report. The template you select from this list determines the fields and prompts in the next step of the wizard, Create Analytics - step 2. **Note:** This drop-down list is not available when only one template is available.
Display Option	Define the display options for the analytic reports. The following display options are available; you can use different combinations of these display options: • Chart • Simple table • Pivot grid
Next	Click to advance the wizard to the next page.

Create Analytics Wizard - Step 2

Use the Create Analytics Wizard - step 2 to select the fields for the analytic reports and to change the default values of the prompt fields.

Navigation:

From the Create Analytics Wizard - step 1, click the **Next** button.

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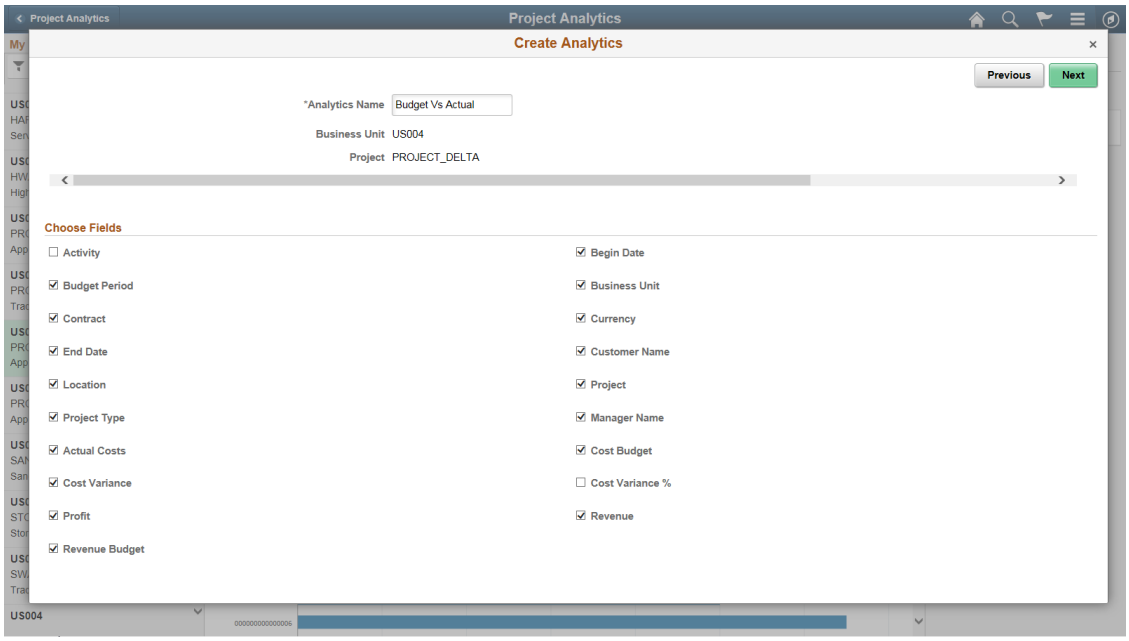
This example illustrates the fields and controls on the Create Analytics Wizard - Step 2 (Budget Vs. Actual). You can find definitions for the fields and controls later on this page.



Term	Definition
Choose Fields	Use this section to select the fields that will appear in the analytic reports. Some fields are preselected because those fields form a part of rows/columns/axis/filters in the base template model.
Previous	Click to go back to the Create Analytics Wizard - step 1.
Next	Click to advance the wizard to the next page, where you can preview the display of the analytic reports.

Create Analytics Wizard - Step 3

Use the Create Analytics Wizard - step 3 to preview the analytic reports based on the display options, fields, and prompts selected in the previous steps of the wizard. Optionally, you can modify (by dragging and dropping, applying filters, and so on) the analytic reports to finalize the design and then click the Save button to save the final report.

Navigation:

From the Create Analytics Wizard - step 2, click the **Next** button.

This example illustrates the fields and controls on the Create Analytics Wizard - Step 3 (Budget Vs. Actual). You can find definitions for the fields and controls later on this page.

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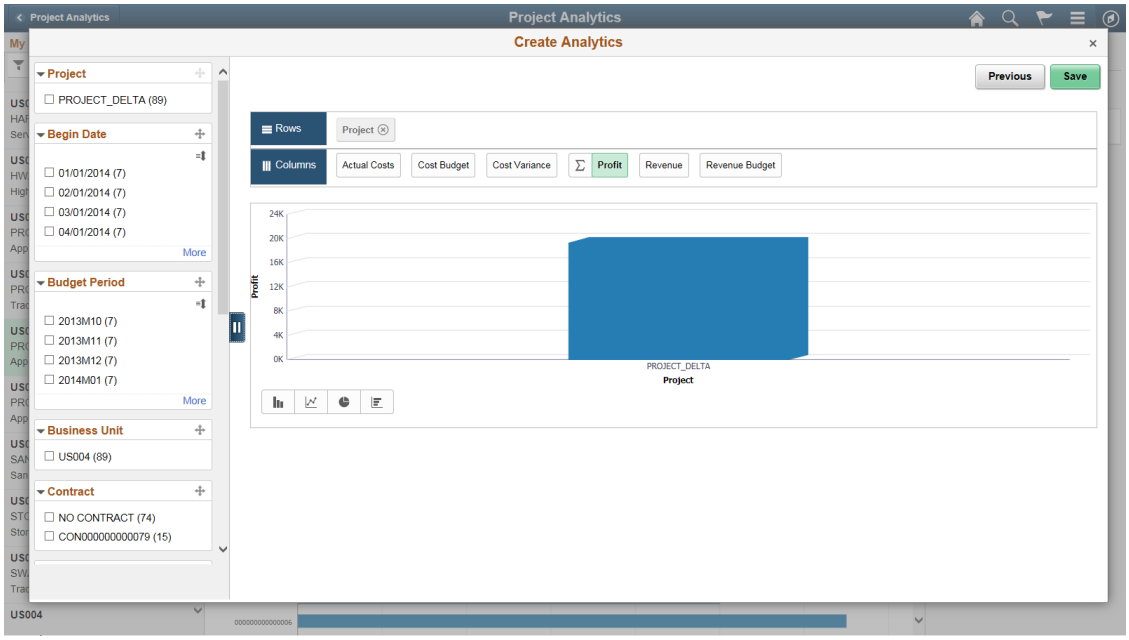

From the preview window, use the **Save** button to save the analytic report.

On saving the analytic report, the **Add to Homepage** button is enabled which you can use to add the analytic report to the fluid homepage. For more information, see Adding Analytic Reports to the Fluid Homepage section in *PeopleTools: Pivot Grid*

If you are an administrator or super user, saving the analytic report enables the **Publish Options** button which you can use to publish the analytic reports to the **My Analytics** section or the **Tile** repository of all users of the component. For more information, see Publishing the Analytic Report section in *PeopleTools: Pivot Grid*

> **Note**
>
> The buttons **Add to Homepage** and **Publish Options** are displayed only when you view the analytic report on a tablet, Laptop or a large monitor. These buttons are not displayed on a smartphone.

Follow the same steps to create analytic reports for Budgets Not Finalized, Closed Projects with Assets, Financial Summary and Project Unbilled Cost WIP Analytics.

For additional information on Simplified Analytics, see *PeopleTools: Pivot Grid*

Reviewing Project Team Resources Using PeopleSoft Fluid

Pages Used to Review Project Team Resources Using PeopleSoft Fluid

Page Name	Definition Name	Usage
My Project Teams (pivot) Page	(none)	View project team resources for all projects that are on your projects list.

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Page Name	Definition Name	Usage
Project Team Resources Page	PC_RES_DTL_FL	View demographics, assignments, and deliverables for each resource assigned to a project.
View Resource Details Page	PC_RES_DTL_FL	View demographics, assignments, and deliverables for each resource assigned to a project.

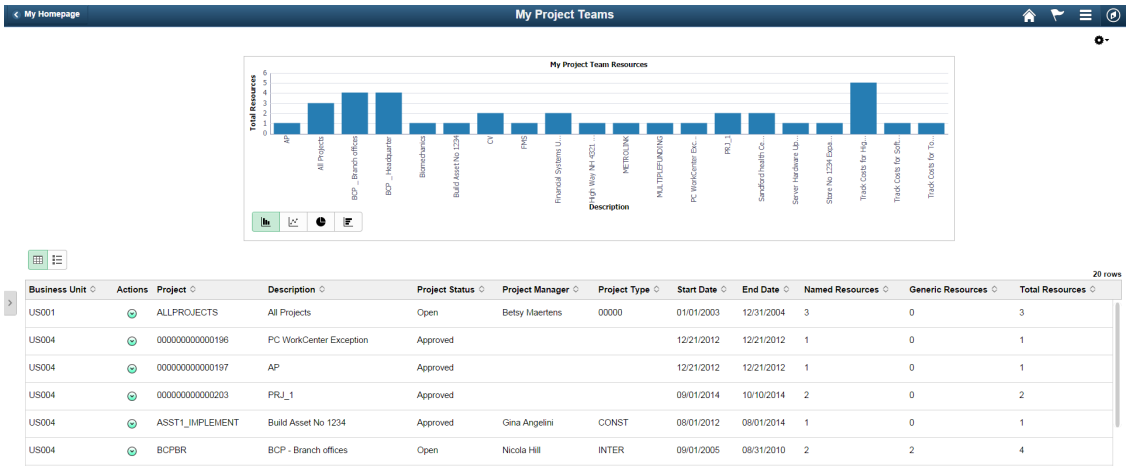
My Project Teams (pivot) Page

Use the My Project Teams (pivot) page to view project team resources for projects that are on your projects list.

Navigation:

Fluid Home, and then **Project Management**, and then **My Project Teams**

This example illustrates the fields and controls on the My Project Teams (pivot) page.



Field or Control	Description
(options menu icon)	Click the Options Menu icon to access these options: • *View Pivot Grid*: Click to access the Pivot Grid page where you can change the grid parameters. • *Update Filters:* Select to access the Update Filters window and add or remove filters for the page. • *Export Data:* Select to export data to Microsoft Excel. • *Chart Options*: Select to access the Chart Options page where you can make changes to the titles, the axis, and axis titles. • *Save:* Select to save personalized view of the Pivot Grid.

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Field or Control	Description
(item on chart)	Select a project on the chart to view the grid below the chart for only the selected project.
(related actions icon)	Select the Related Actions icon to access these options: • *View Team Resources*: Select to access the Project Team Resources Page in a new tab. • *View Team Schedule*: Select to access the Project Resources Page. • *View Project Financials*: Select to access the Project Financials (pivot) Page in a new tab. • *View Project Performance:* Select to access the Project Performance Page in a new tab. • *Notify Manager*: Select to access the Notify Manager page as a modal window.

Project Team Resources Page

Use the Project Team Resources page (PC_RES_DTL_FL) to view demographics, assignments, and deliverables for each resource assigned to a project.

Navigation:

Fluid Home, and then **Project Management**, and then **My Project Teams**. Click the Actions icon and select View Team Resources.

This example illustrates the fields and controls on the Project Team Resources page.

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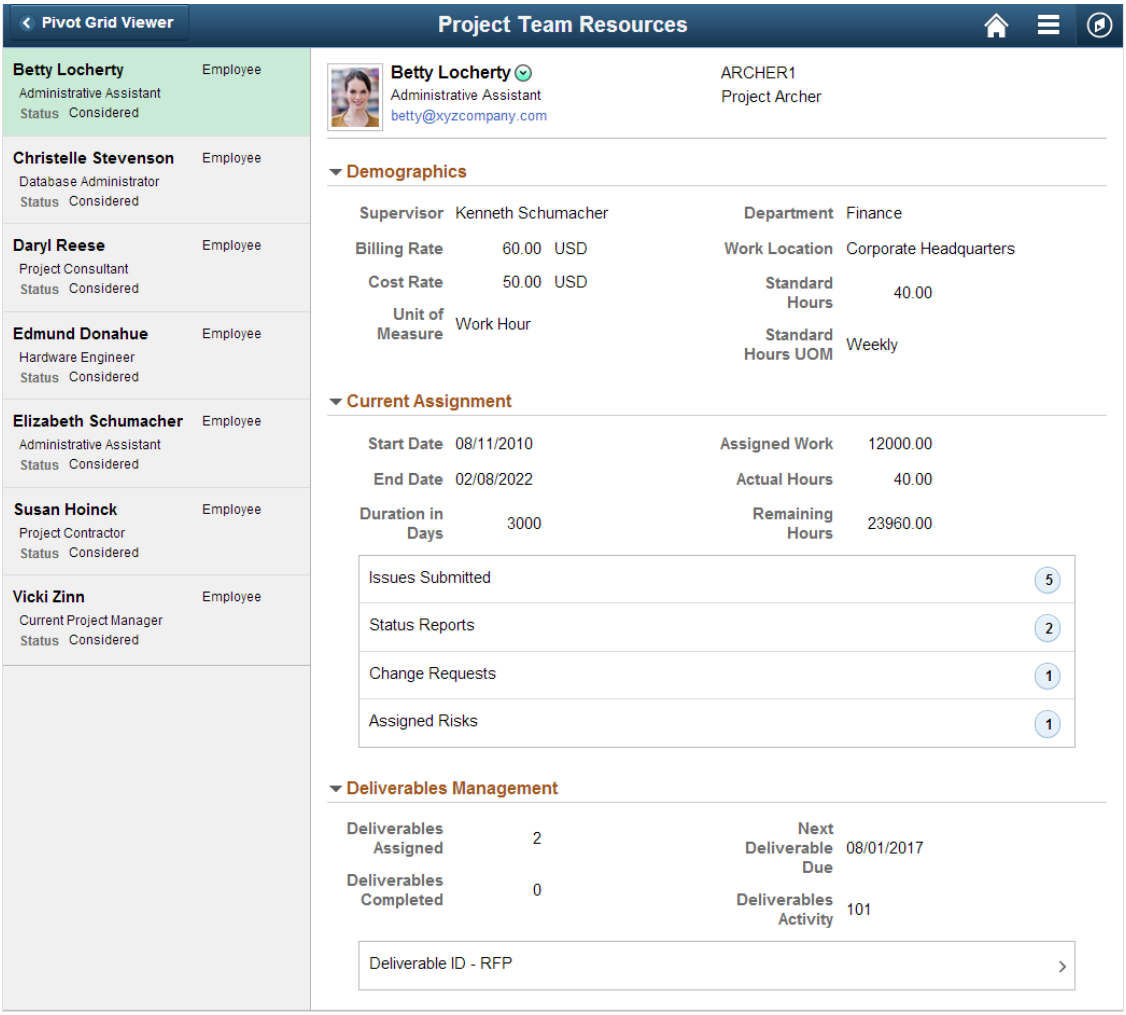

Use this page to view all resources assigned to a project. All resources are listed in the left pane.

Field or Control	Description
(resource name)	Select a resource in the left pane to display resource information in the right pane.
(Related Actions icon)	Click the Related Actions icon to access the Notify Resource or Resource Business Card windows.

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Field or Control	Description
Current Assignment	This section displays a table that shows the number of issues submitted, status reports, changes requests, and assigned risks for the resource. If a number is shown next to the assigned item, you can click the number to open the PeopleSoft Classic page. • Issues Submitted: Select to access the Project Issues page. • Status Reports: Select to access the Review Status Reports page. • Change Requests: Select to access the Project Change Request page. • Assigned Risks: Select to access the Project Risk page.
Deliverables Activity	Click this link to access the Activity Deliverables Details page. This link is active only when deliverables are due. This link is for the next deliverable that is due.

View Resource Details Page

Use the View Resource Details (level 3) page (PC_RESOURCE_DTL_FL) to view demographics, assignments, and deliverables for each resource assigned to a project.

Navigation:

Select View Resource Details from the Actions icon.

This example illustrates the fields and controls on the View Resource Details page (1 of 2).

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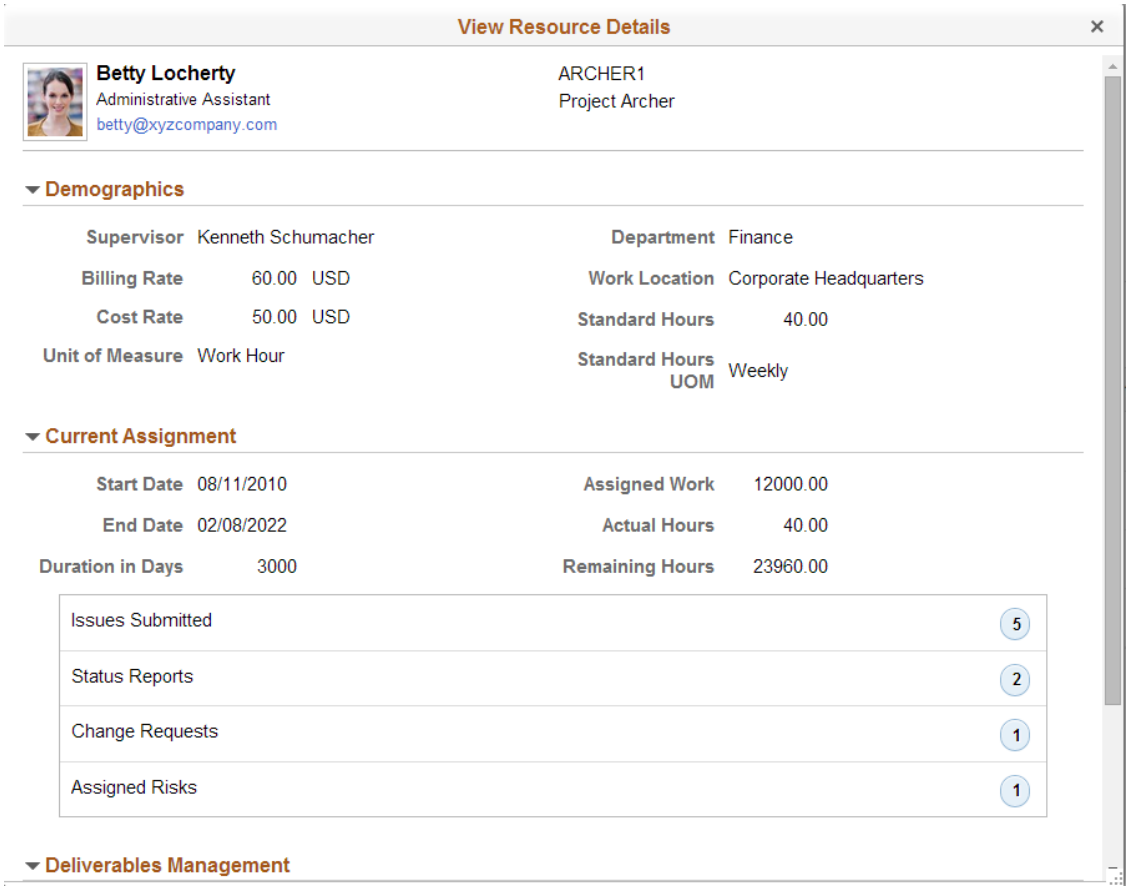

This example illustrates the fields and controls on the View Resource Details page (2 of 2).

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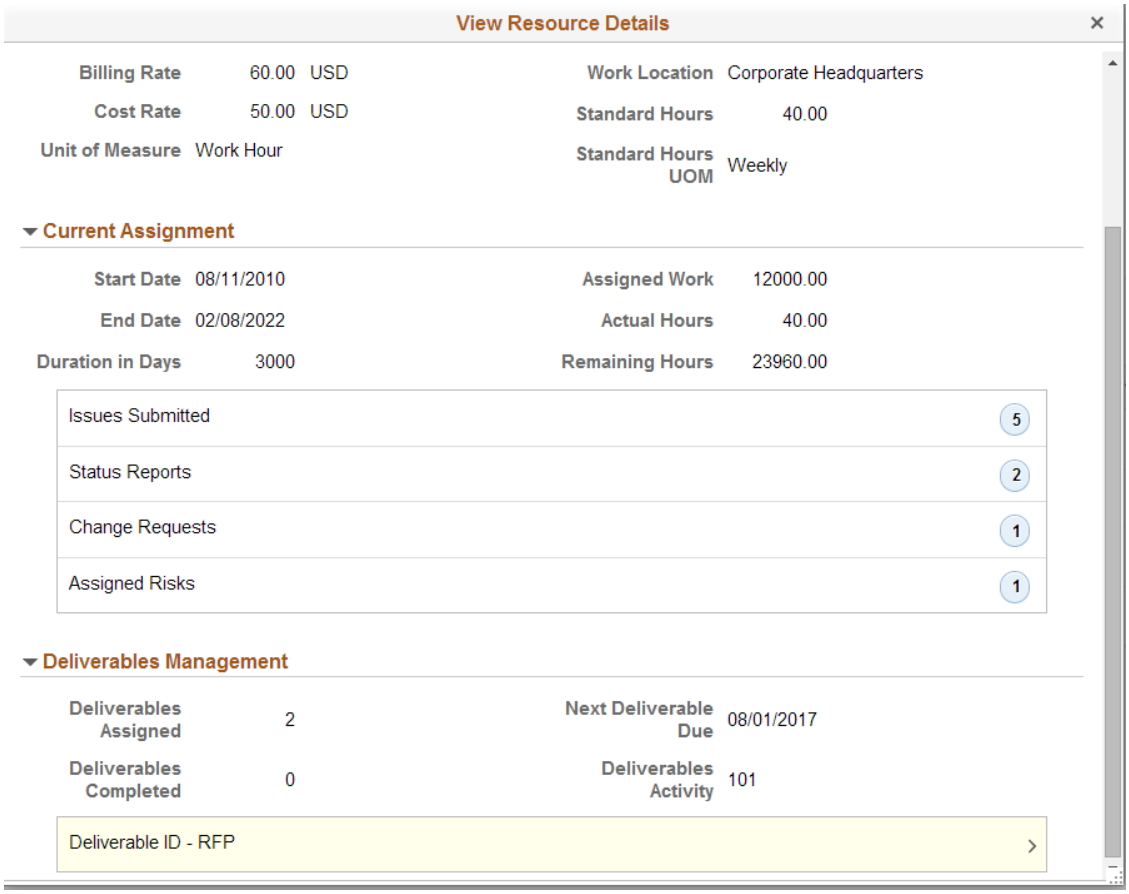

Use this page to view the same options that are available on the Project Team Resources Page for a specific resource.

Reviewing Project Financials Using PeopleSoft Fluid

Pages Used to Review Project Financials Using PeopleSoft Fluid

These pages display the projects that are on your Projects List Page. They are limited to the Project Costing business unit and currency specified on the My Preferences - Report Business Unit Page.

Page Name	Definition Name	Usage
Project Financials (pivot) Page	(none)	View actual amounts spent for all of your projects as a chart, table, or Pivot Grid.
Project Financials (detail) Page	PC_PROJ_FIN_FL	View financial performance and billing information for a project or activity.
Project Performance Page	PC_PROJ_PERF_FL	View the performance and health for a project or activity.

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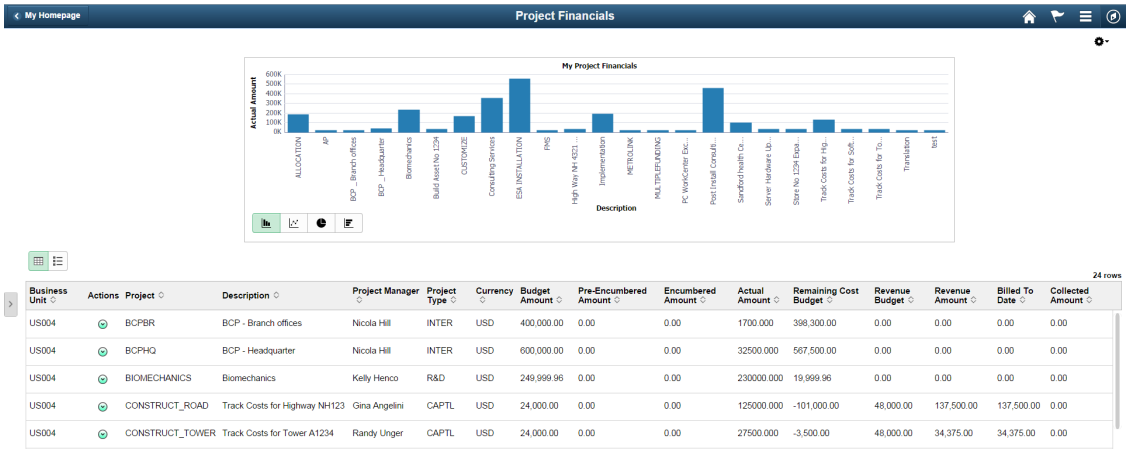
Project Financials (pivot) Page

Use the Project Financials (pivot) page to view actual amounts spent for all of your projects as a chart, table, or Pivot Grid.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Financials**

This example illustrates the fields and controls on the Project Financials (pivot) page.



Field or Control	Description
(options menu icon)	Select the Options Menu icon to access these options: • Update Filters • Export Data • Chart Options • Save
(link on a row)	Click a link on a row of the Pivot Grid to access the Project Financials (detail) Page.
(item on chart)	Select a project on the chart to view the project in the grid.

Grid Section

Field or Control	Description
(actions)	Select the Related Actions icon to access the Project Financials (detail) Page, the Project Performance Page, or to send a notification to the project manager.

Project Financials (detail) Page

Use the Project Financials (detail) page (PC_PROJ_FIN_FL) to view financial performance and billing information for a project or activity.

Navigation:

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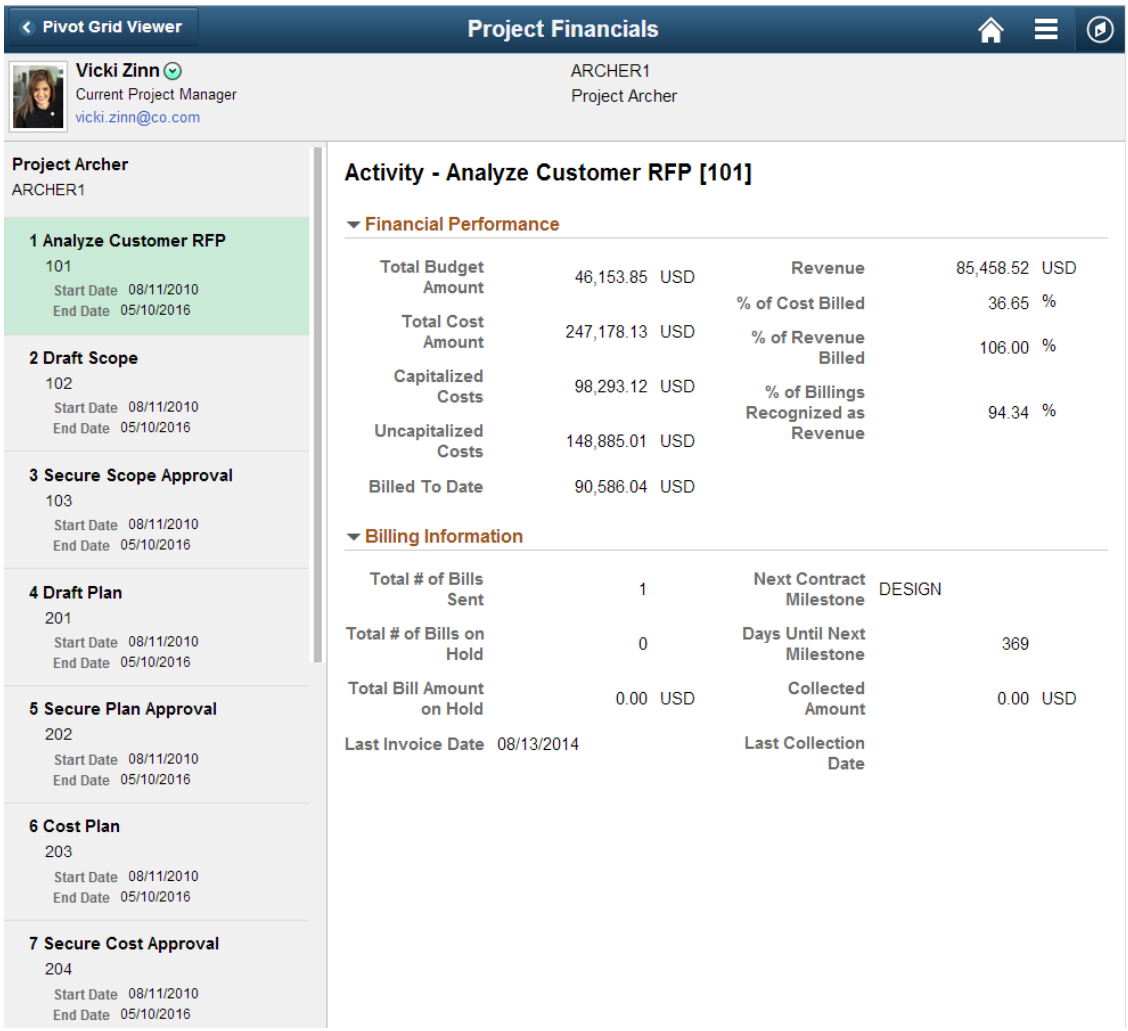
Fluid Home, and then **Project Management**, and then **Project Financials**. Select the Related Actions icon and then select View Project Financials.

This example illustrates the fields and controls on the Project Financials (detail) page.



Field or Control	Description
Project or Activity (listed on the left pane)	Select a project or activity to display financial performance and billing information on the right pane.
(related actions icon)	Select one of these options: • Notify Manager: Select to access the Notify Manager page. • View Business Card: Select to access the Application Fundamentals: View Business Card Page.

Project Performance Page

Use the Project Performance ((PC_PROJ_PERF_FL) page to view the performance and health for a project or activity.

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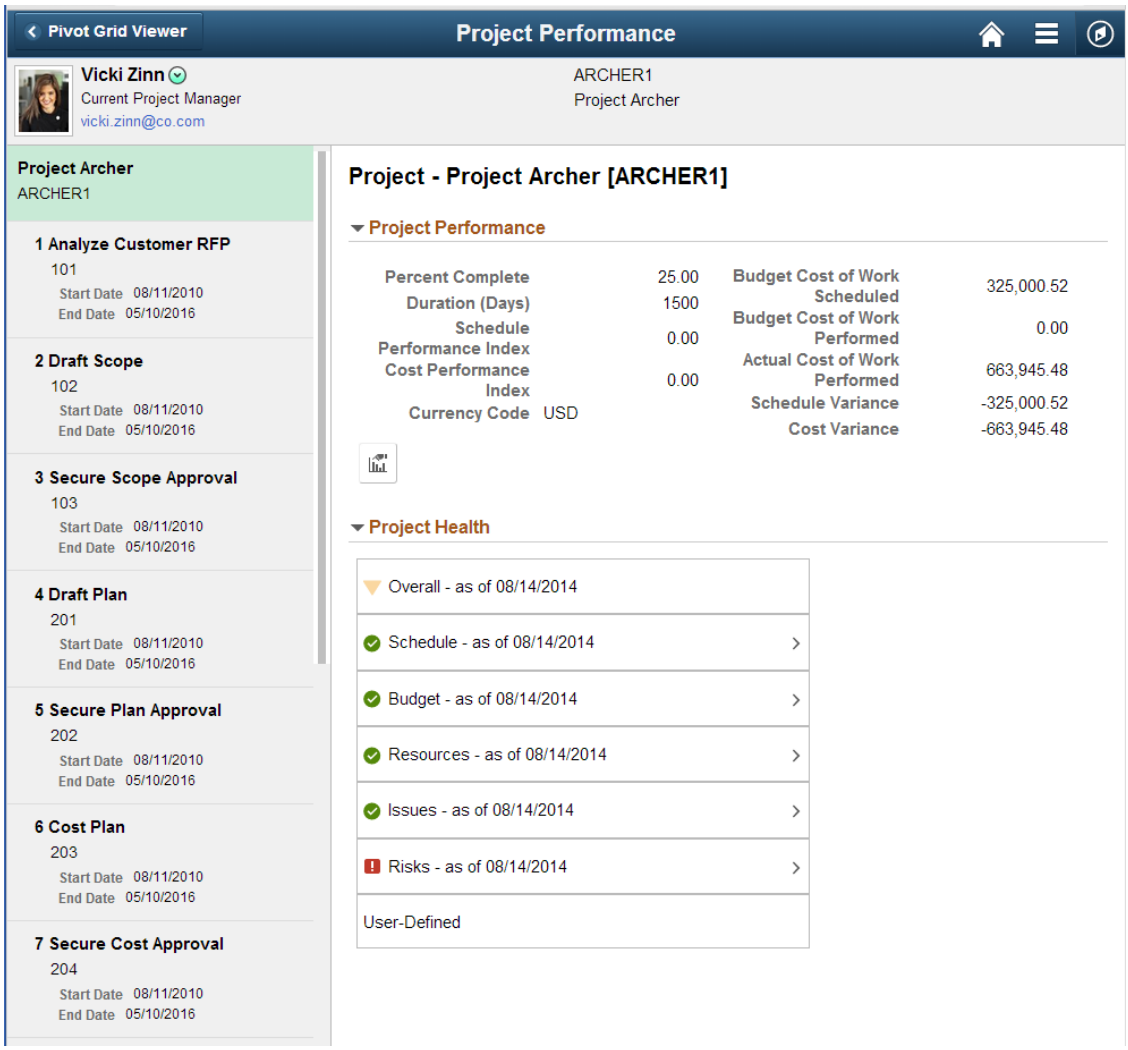
Navigation:

Select View Project Performance from the related actions icon on other Project Management fluid pages such as Project Financials.

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



Project performance is based on the information displayed on the PeopleSoft Program Management: Earned Value Page in PeopleSoft Program Management. Project health is based on the information provided on the Workbench pages for projects and activities in Program Management, see “Analyzing Project Data” in the Program Management documentation.

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Field or Control	Description
(related actions icon)	Click the Related Actions icon next to the project manager and select one of these options: • Notify Manager: Select to access the Notify Manager page. • View Business Card: Select to access the Application Fundamentals: View Business Card Page.
Project (or Activity) pane	Select a project (or activity) to display performance and health on the right pane.
(view earned value projection icon)	Click the View Earned Value Projection icon to view the Earned Value Projection chart. This chart compares value amounts to periods.
Project (or Activity) Health section	This section displays the health of a project or activity based on the schedule, budget, resources, issues, risks, and deliverables. You can click the arrow to the right of each item to view a small window with more details.

Reviewing Project Timesheets Due Using PeopleSoft Fluid

Pages Used to Review Project Timesheets Due Using PeopleSoft Fluid

Page Name	Definition Name	Usage
Project Timesheets Due (pivot) Page	(none)	View timesheets that are in progress and missing for all projects or a specific project.
Project Timesheets Due (detail) Page	PC_LATETIMESH_FL	View timesheets that are in progress and missing for a specific resource.

Understanding Project Timesheets Due

You must have PeopleSoft Expenses installed on your system.

The projects that are eligible for these pages are those that are on your Projects List Page.

When calculating missing timesheets, the system:

- Considers only projects that have a current or future end date.

  The system does not consider projects that have an end date that has past.
- Requires that at least one resource on the team has created timesheet for the project.

  For missing timesheets, the timesheet must be for the same project and Expenses business unit, and the period end date is between this resource's start and end date on the project team.

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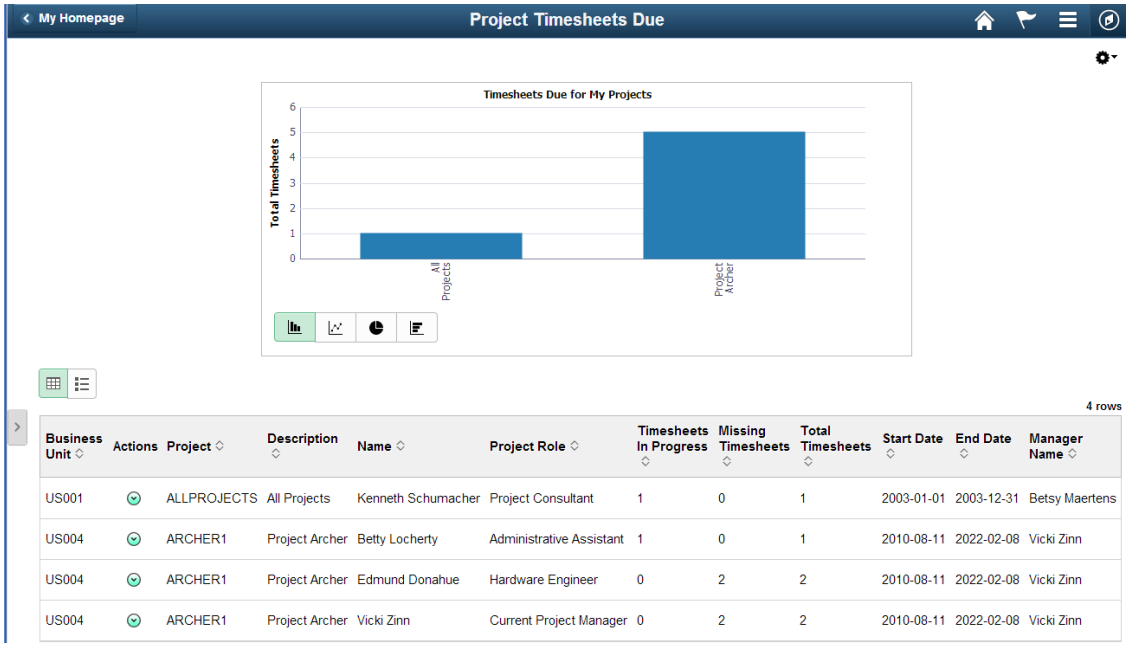
Project Timesheets Due (pivot) Page

Use the Project Timesheets Due (pivot) page to view timesheets that are in progress and missing for all projects or a specific project.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Timesheet Due**

This example illustrates the fields and controls on the Project Timesheets Due (pivot) page.



The Project Timesheets Due chart and page displays timesheets that are in-progress and missing for the resources on the projects from your Projects List Page.

Field or Control	Description
(options menu)	Select the Options Menu icon to access these options: • View Pivot Grid • Update Filters • Export Data • Chart Options • Save
(item on chart)	Select a project on the chart to access these options: • Detailed View: Select to view the grid below the chart for only the resources associated with the selected project. • Drill down To: *Name*: Select to view the chart by resource name for the selected project.

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Field or Control	Description
(actions)	Select the Actions icon to access these options: • View Timesheet Details: Select to access the Project Timesheets Due (detail) Page. • View Resource Details: Select to access the View Resource Details page. • Notify Resource: Select to access the Notify Resource page. • Notify Manager: Select to access the Notify Manager page.
Timesheets In Progress	Displays the number of timesheets that are in progress.
Missing Timesheets	Displays the number of missing timesheets that are from projects that have an end date that is equal to the current date or a date in the future. Projects that have end dates that are in the past are excluded. In addition, at least one person on the team must have created a timesheet for the same project, same PeopleSoft Expenses business unit, and where their timesheet period end date is between the other resource's start and end date on the project team.

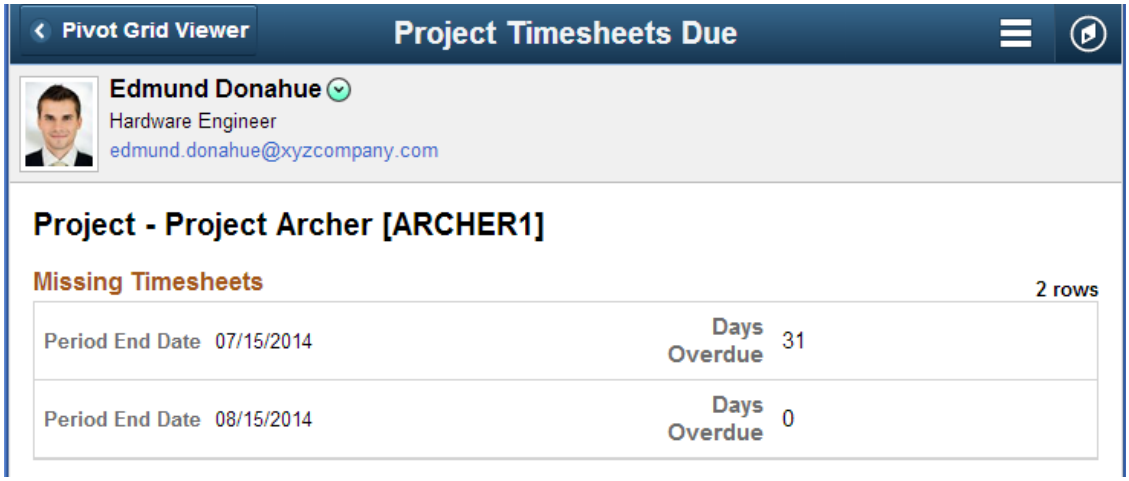
Project Timesheets Due (detail) Page

Use the Project Timesheets Due (detail) page (PC_LATETIMESH_FL) to view timesheets that are in progress and missing for a specific resource.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Timesheet Due**. Select View Timesheet Details from the Actions icon.

This example illustrates the fields and controls on the Project Timesheets Due (detail) Page.



Use this page to view missing timesheets and timesheets that are in the process of being approved.

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The projects that are eligible for this page are those that are on your Projects List Page.

Field or Control	Description
(related actions icon)	Select the related actions icon to access these options: • Notify Resource: Select to access the Notify Resource page. • View Resource Details: Select to access the View Resource Details page. • View Business Card: Select to access the View Business Card window.

Reviewing Profit Margins and Unbilled Cost Using PeopleSoft Fluid

Pages Used to Review Profit Margins and Unbilled Cost Using PeopleSoft Fluid

Page Name	Definition Name	Usage
Project Profit Margin (pivot) Page	(none)	View profit margins for your projects.
Contract Profit Margin (pivot) Page	(none)	View profit margins for the contracts where the project is listed on your My Projects List.
Project Unbilled Cost WIP (pivot) Page	(none)	View project costs that have not been billed or are work in progress for your projects.

Project Profit Margin (pivot) Page

Use the Project Profit Margin (pivot) page to view profit margins for your projects.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Profit Margin**

This example illustrates the fields and controls on the Project Profit Margin (pivot) page.

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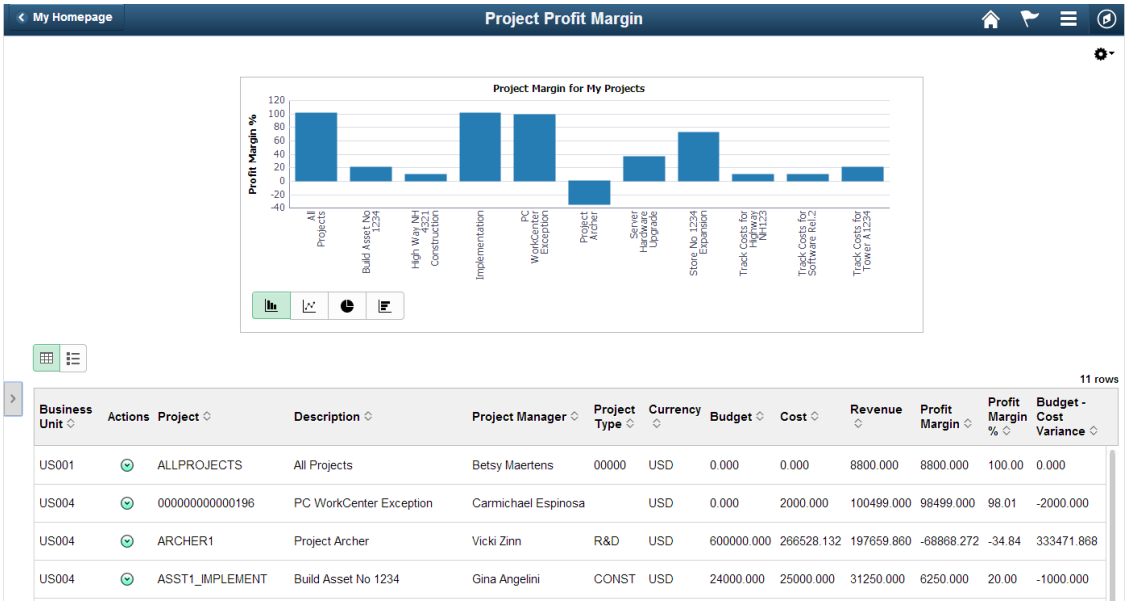

This page displays the profit margins for the projects that are on your Projects List Page. The Profit Margin groupings are determined on the Reporting Options - Reporting Groups Page.

Field or Control	Description
(options menu)	Select the Options Menu icon to access these options: • View Pivot Grid • Update Filters • Export Data • Chart Options • Save
(item on chart)	Select a project on the chart to view the grid below the chart for only the project selected.
(related actions icon)	Select the Related Actions icon to access these options: • View Project Financials: Select to access the Project Financials (detail) Page. • View Project Performance: Select to access the Project Performance Page. • Notify Manager: Select to access the Notify Manager page.

Contract Profit Margin (pivot) Page

Use the Contract Profit Margin (pivot) page to view profit margins for the contracts where the project is listed on your My Projects List.

> **Note**
>
> This information is only available if you have PeopleSoft Contracts installed on your system.

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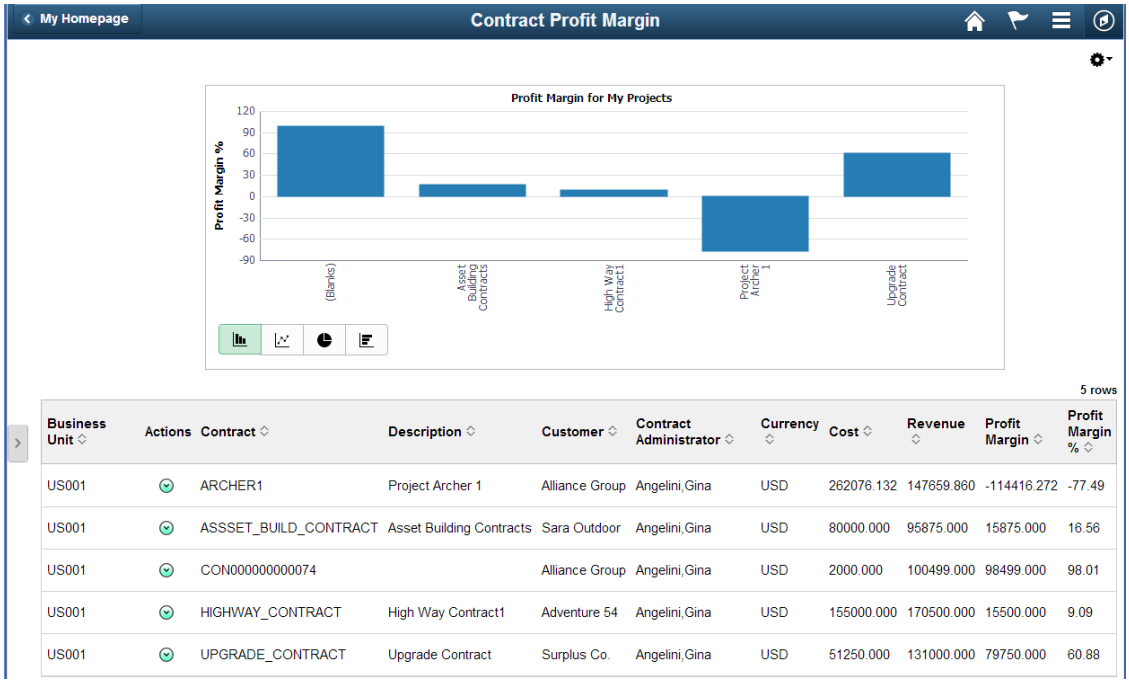
Navigation:

Fluid Home, and then **Project Management**, and then **Contract Profit Margin**

This example illustrates the fields and controls on the Contract Profit Margin (pivot) page.



This page displays the profit margins for the contract projects on your Projects List Page. The profit margin groupings are determined on the Reporting Options - Reporting Groups Page.

Field or Control	Description
(options menu)	Select the Options Menu icon to access these options: • View Pivot Grid • Update Filters • Export Data • Chart Options • Save
(item on chart)	Select a project contract on the chart to view the grid below the chart for only the contract selected.
(related actions icon)	Select the Related Actions icon to access the Notify Contract Administrator page, if one is entered for the contract.

Project Unbilled Cost WIP (pivot) Page

Use the Project Unbilled Cost WIP (pivot) page to view project costs that have not been billed or are work in progress for your projects.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Unbilled Cost WIP**

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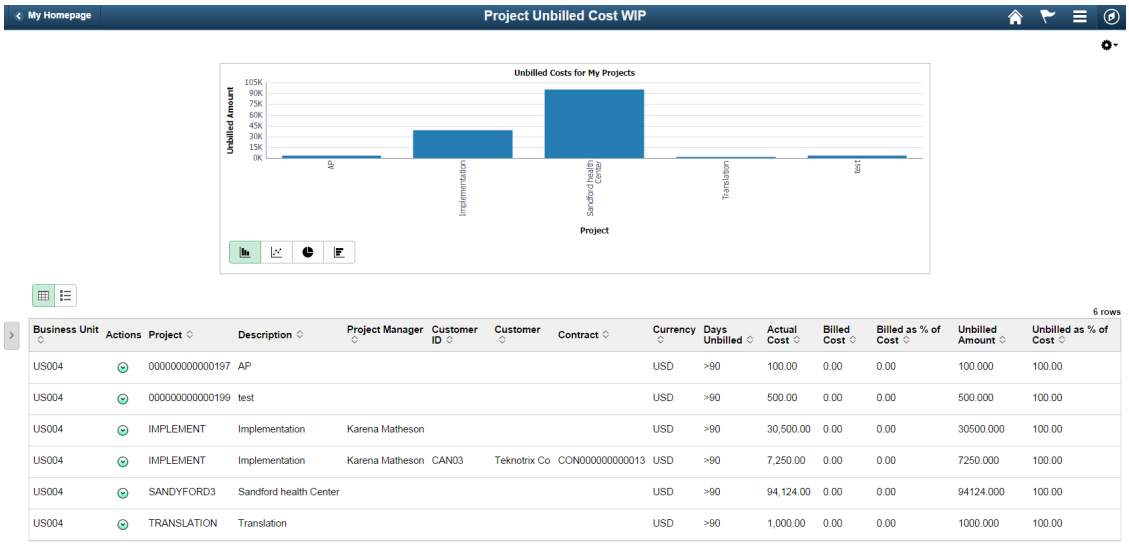
This example illustrates the fields and controls on the Project Unbilled Cost WIP (pivot) page.



This page displays the projects that are on your Projects List Page. It is limited to the Project Costing business unit and currency specified on the Employee Self Service -My Preferences - Report Business Unit Page. The Aging Group is determined on the Reporting Options - Reporting Groups Page.

> **Note**
>
> This page does not show transactions that have been sent to PeopleSoft Billing.

Field or Control	Description
(options menu)	Select the Options Menu icon to access these options: • View Pivot Grid • Update Filters • Export Data • Chart Options • Save
(item on chart)	Select a project on the chart to view the grid below the chart for only the project selected. Multiple rows for a project are based on the aging group specified on the Reporting Options - Reporting Groups Page.
(related actions icon)	Select the Related Actions icon to access these options: • View Project Financials: Select to access the Project Financials (detail) Page. • View Project Performance: Select to access the Project Performance Page. • Notify Manager: Select to access the Notify Manager page.

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Field or Control	Description
Days Unbilled	Displays the number of days based on reporting options setup. **Note:** If your summarization template has a transaction date roll-up, then this is the dates that is considered for the Days Unbilled calculation.

Locating Resources Using PeopleSoft Fluid

Page Used to Locate Resources Using PeopleSoft Fluid

Page Name	Definition Name	Usage
Resource Locator Page	PC_MAP_FL	View resources, candidates, and projects on a map.
Project Information Page	PC_PRJ_INFO_SCF	View more information about a project.
Resource Page	PC_MBR_INFO_SCF	View labor resources for a project.
Search for New Resources Page	PC_MAP_SRCH_SCF	Search for personnel that can be added to a project based on search parameters.
Candidates Page	PC_RS_INFO_SCF	View and select candidates that meet the search requirements on the Search for New Resources page, and assign a project role to the candidate.

Understanding the Resource Locator

The Resource Locator feature provides a map-based view of projects, labor resources, and potential candidates that can be utilized to staff to a project. In addition, the project manager can specify resource qualifications and utilize the resource search that is provided in PeopleSoft Resource Management to find qualified candidates to consider for projects. The project manager can review and compare candidates, and flag them as considered, which is similar to features currently available in PeopleSoft Program Management.

Note these points about the Resource Locator:

- You must have PeopleSoft Project Costing, Program Management, and Resource Management installed on your system.
- Geocodes must be loaded into the RS_GEOCODE_CITY table.
- The Resource Locator page displays active projects that are assigned to the user who is signed on, and active resources assigned to the selected project on the map.
- You can search for new resources, displays candidates on the map, and add resources to a project.
- This feature cannot be used on a smart phone.

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eLocation Services

Oracle's PeopleSoft uses Nokia's eLocation services. Use these links to access:

- Terms of Use: http://elocation.oracle.com/elocation/legal.html.
- Supplier Notices: http://spatial.us.oracle.com/assets/nokia_supplier_notices.pdf.

Common Elements Used When Locating Resources

Field or Control	Description
(candidate icon)	Click the Candidate icon to access the Candidates page.
(project icon)	Click the Project icon to access the Project Information page.
(related action icon)	Click the Related Action icon to access additional pages.
(resource icon)	Click the Resource icon to access the Resource page.

Resource Locator Page

Use the Resource Locator page (PC_MAP_FL) to view resources, candidates, and projects on a map.

Navigation:

Fluid Home, and then **Project Management**, and then **Resource Locator**

This example illustrates the fields and controls on the Resource Locator page.

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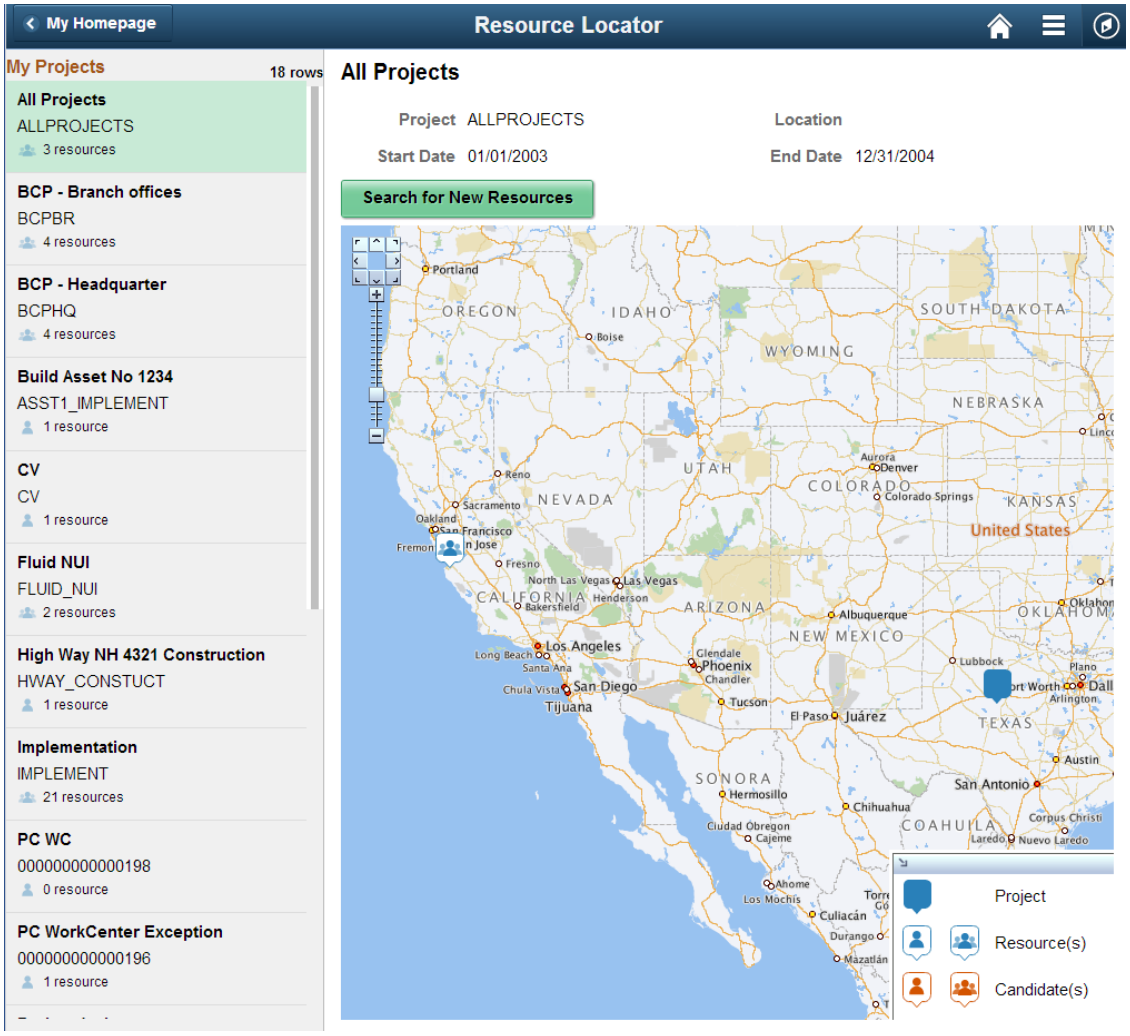

> **Note**
>
> This page may appear different depending on the device you are using.

Field or Control	Description
My Projects	Select a project in the My Projects column to display the project, resources, and candidates on the map. Each time you select a new project, the system refreshes the map to display the project location, resources and candidates for that project. The projects that are displayed are those projects that are displayed on your Projects List Page.
Search for New Resources	Click this button to access the Search for New Resources Page.

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Field or Control	Description
Action List	Click the Actions List to access the My Preferences - Resource Locator Page where you can change your search preferences for the resource locator.

Project Information Page

Use the Project Information page (PC_PRJ_INFO_SCF) to view more information about a project.

Navigation:

Click the Project icon on the map.

This example illustrates the fields and controls on the Project Information page when using PeopleSoft Classic.

Field or Control	Description
Related Actions	Click the Related Action icon to select the Resource Schedule option. Resource Schedule option accesses the Project Resources page for the project.

Search for New Resources Page

Use the Search for New Resources page (PC_MAP_SRCH_SCF) to search for personnel that can be added to a project based on search parameters.

Navigation:

Fluid Home, and then **Project Management**, and then **Resource Locator**. Click the Search for New Resources button.

This example illustrates the fields and controls on the Search for New Resources.

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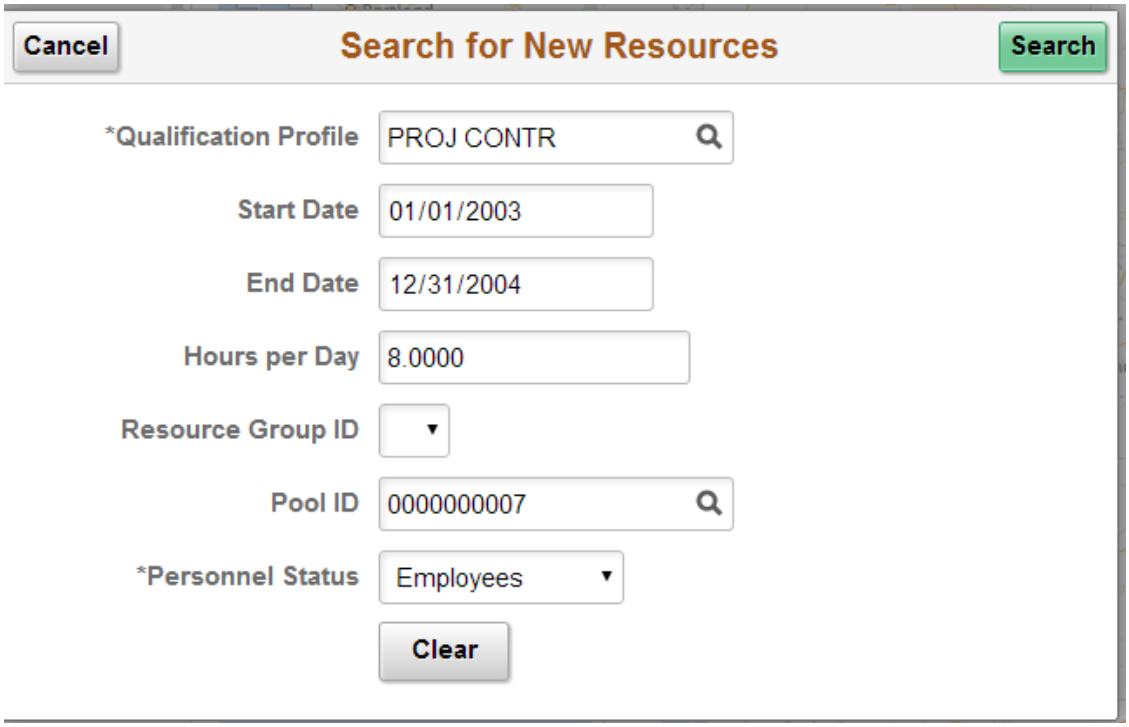

Field or Control	Description
Qualification Profile	Select an option, which is determined using the Qualification Profile page. See PeopleSoft Resource Management: Creating and Updating Qualification Profiles.
Resource Group ID	Select a resource group Id, which is determined on the PeopleSoft Resource Management: Express Search Page.
Pool ID	Select a pool ID, which is determined on the PeopleSoft Resource Management: Resource Pool Page
Search	Click to initiate the search and access the Candidates Page.

Candidates Page

Use the Candidates page (PC_RS_INFO_SCF) to view and select candidates that meet the search requirements on the Search for New Resources page, and assign a project role to the candidate.

Navigation:

Click the Search button on the Search for Resources page.

Field or Control	Description
Availability and **Qualification**	Displays the availability and qualifications fit score that is determined on the My Preferences - Resource Locator Page.

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Field or Control	Description
Project Role	Select a project role for the candidate if you determine that the candidate should be assigned to the project. When you select a project role, the system automatically changes the Considered option to Yes.
Considered	Select *Yes* or *No* to determine whether the candidate should be considered for the project: • *Yes*: If the Project Role field is blank, then the system displays a message reminding you to select a project role. • *No*: If the Project Role field has a value, then the system clears the field.
Done	Click this button to indicate that you have reviewed all candidates. Candidates that have a *Yes* value in the **Considered** field and a value in the **Project Role** field are added to the project. The system displays a message indicating how many resources were added to the project, refreshes the map with the added resources, and updates the resource count on the left pane.

Scheduling Resources Using PeopleSoft Fluid

Pages Used to Schedule Resources Using PeopleSoft Fluid

Page Name	Definition Name	Usage
Project Schedules Page	EP_PC_MY_RPJ_FL_GBL	View date ranges for all projects.
Project Resources Page	EP_PC_TM_SCHD_FL_GBL	View all resources, their role, and the duration to which they are assigned to a project.
Resource Schedule Page	EP_PC_RS_SCHD_FL_GBL	View the projects and activities assigned to a resource.
Resource Schedule - Activity Page	PC_RS_SCHD_SCF	View more information about the activity.
Project Resource Details Page	None	View details about the resource assignment for the project.

Understanding Resource Schedules Using PeopleSoft Fluid

Using the PeopleSoft Fluid pages to schedule resources allows project managers to view project dates, activity dates, and resource assignments in a Gantt Chart format. Gantt Charts allow project managers to compare multiple project, activity, and resource assignments to one another. For this feature, Oracle's PeopleSoft provides a modified version of the Gantt Chart feature that enables users to view information side-by-side and to drill into project, activity, and resource details. This allows project managers to identify and address project-related schedule issues.

Note these points about the Gantt Chart when using the PeopleSoft Fluid pages:

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- The Gantt Chart is display only, does not support drag and drop, and cannot be re-sized.
- The Gantt Chart displays only daily and monthly views.
- The Gantt Chart cannot be viewed using a smart phone.

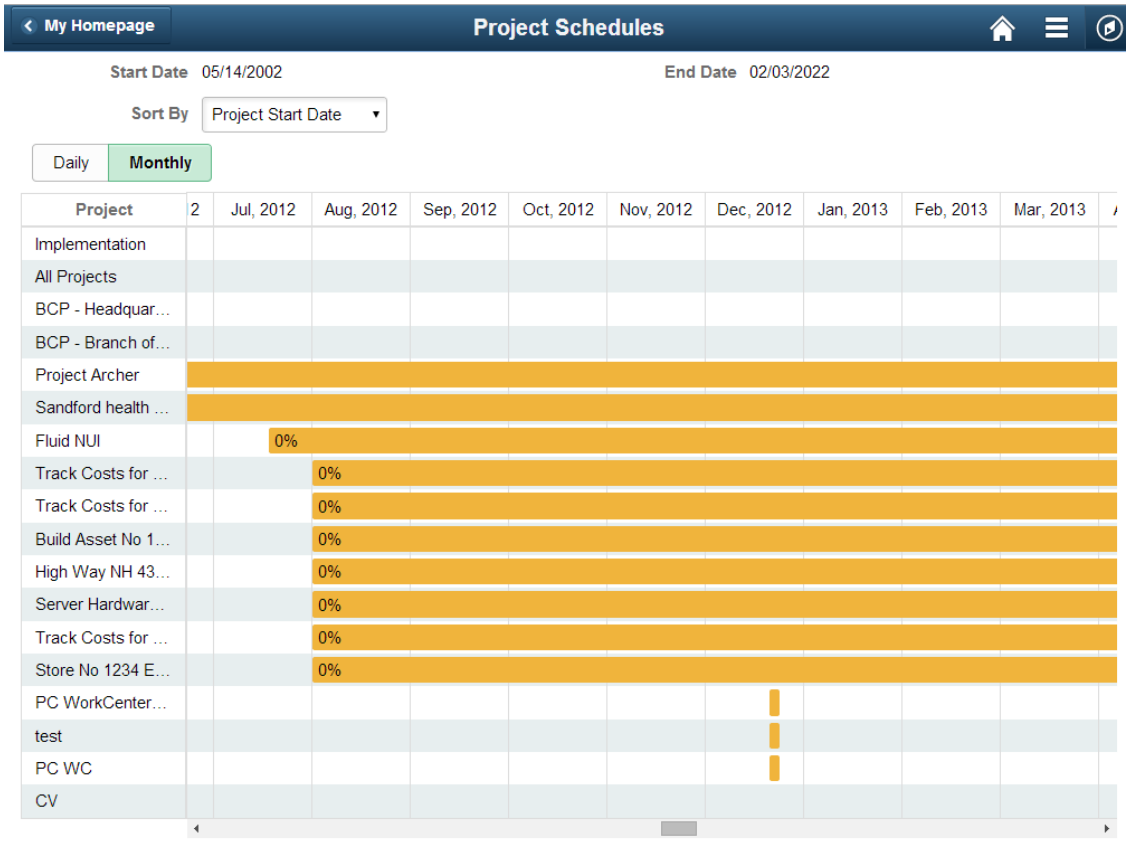
Project Schedules Page

Use the Project Schedules page (EP_PC_MY_RPJ_FL_GBL) to view date ranges for all projects.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Schedules**

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



Field or Control	Description
Sort By	Select an option that the system uses to sort the projects. Options include: • *Project % Complete* • *Project Description* • *Project End Date* • **Project Start Date**

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Field or Control	Description
Daily and **Monthly**	Click the Daily or the Monthly button to change the column headings in the bar chart. The system automatically refreshes the page when you select an option.
(Project label of Project bar)	Click a project label or the project bar to access the Resource Schedule Page.

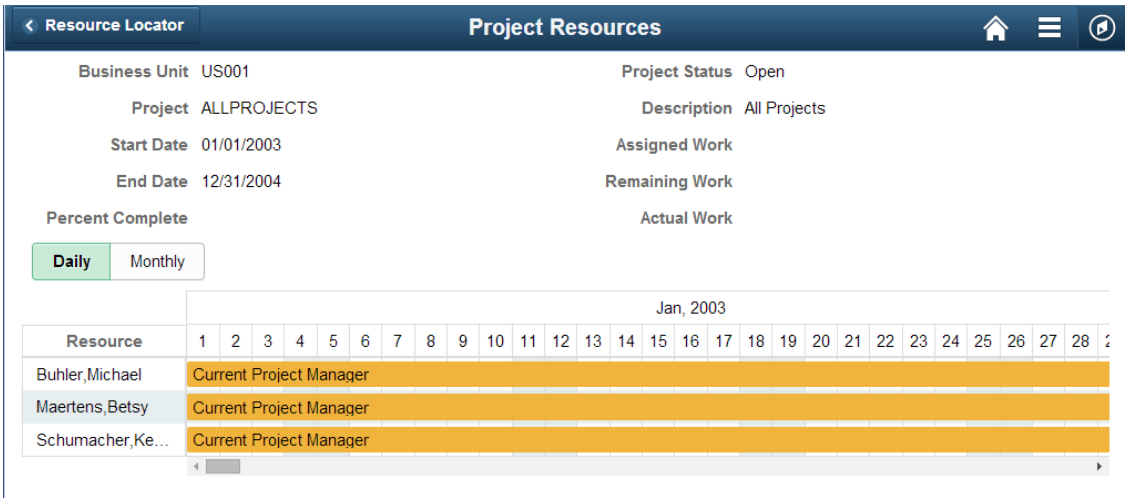
Project Resources Page

Use the Project Resources page (EP_PC_TM_SCHD_FL_GBL) to view all resources, their role, and the duration to which they are assigned to a project.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Schedules**. Click the bar of a project.

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



Use this page to view all resources for a specific project. For each resource, the system shows the role and date range for which the resources is assigned to the specific project

Field or Control	Description
Assigned Work, **Remaining Work**, and **Actual Work**	Displays the sum of the work that is assigned to the resource at the activity level.
(Resource)	Click a resource to access the Resource Schedule Page.
(Resource bar)	Click a resource bar to access the Project Resource Details Page.

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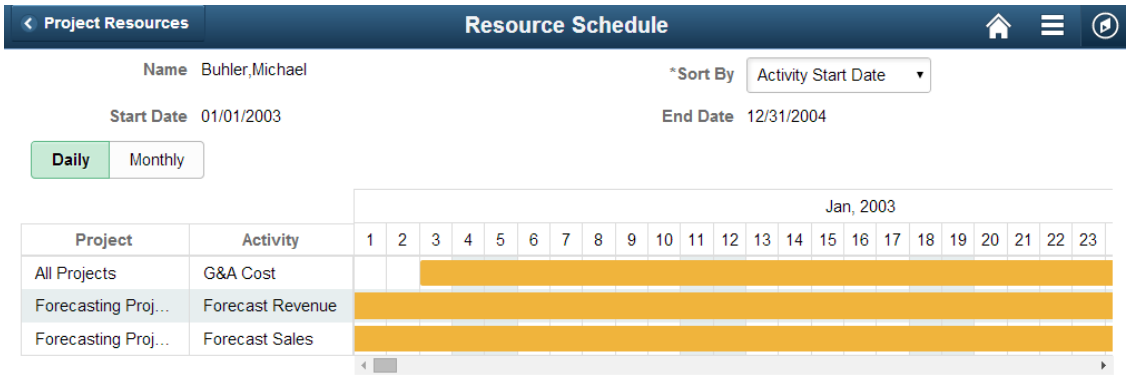
Resource Schedule Page

Use the Resource Schedule page (EP_PC_RS_SCHD_FL_GBL) to view the projects and activities assigned to a resource.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Schedules**. Click the bar of a project and then click a resource name.

This example illustrates the fields and controls on the Resource Schedule page.



Use this page to view project and activity date ranges to which a specific resource is assigned.

Field or Control	Description
Daily and **Monthly**	Click the Daily or the Monthly button to change the column headings in the bar chart. The system automatically refreshes the page when you select an option.
Project label, **Activity** label, and project activity bar	Click the project name label, the activity name label, or the project activity bar to access the Resource Schedule - Activity Page.

Resource Schedule - Activity Page

Use the Resource Schedule - Activity page (PC_RS_SCHD_SCF) to view more information about the activity.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Schedules**. Click the bar of a project. Click an activity.

This example illustrates the fields and controls on the Resource Schedule - Activity page.

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Project Resource Details Page

Use the Project Resource Details page to view details about the resource assignment for the project.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Schedules**. Click the bar of a project and then click the bar of a resource.

This example illustrates the fields and controls on the Project Resource Details page.

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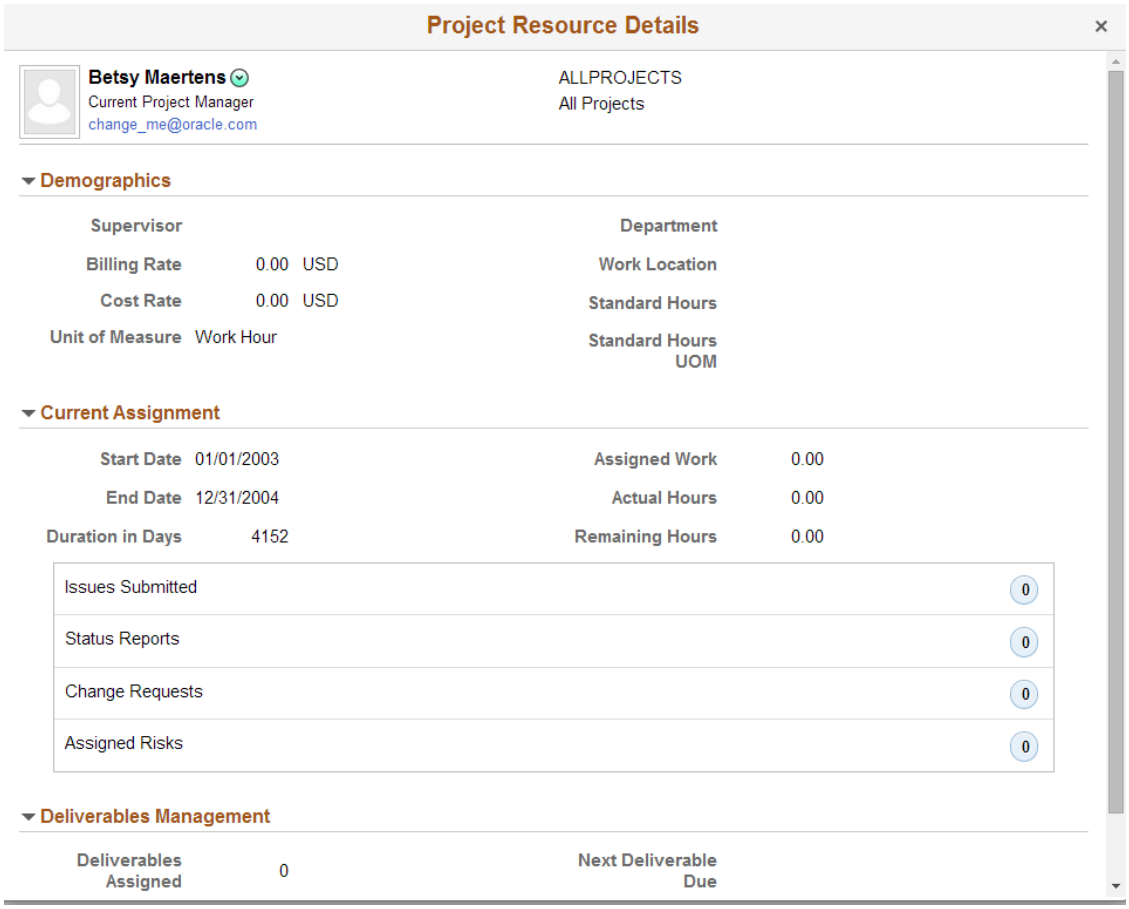

Use this page to view all projects to which a specific resource is assigned.

Field or Control	Description
Issues Submitted, Status Reports, Change Requests, and **Assigned Risks**	Click to access additional information about the status. The number indicates how many records are recorded for that status. For example, if the number “5” is shown for Assigned Risks, then there are 5 risks assigned to the resource for the project.

Reviewing Project Status Reports Using PeopleSoft Fluid

Pages Used to Review Project Status Reports Using PeopleSoft Fluid

Page Name	Definition Name	Usage
Project Status Reports Page (pivot)	PGM_SR_EE_FL	View all status report for the projects that are assigned to you in a pivot grid format.
Project Status Reports Page	PGM_SR_UPD_FL	View all status reports for the projects that are assigned to you.

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Page Name	Definition Name	Usage
Edit Status Report Page	PGM_SR_UPD_FL	View and edit the status of projects that are assigned to you.
New Status Report Page	PGM_SR_UPD_FL	Create a status report for one of your projects.

Understanding Project Status Reports

Project status reports can be view from two locations:

- From the Employee Self Service Home page.

  These reports can be used for team resources that are associated with some projects and activities. These reports are submitted by employees, each period, using this option.

- From the Project Management Home page.

  These reports can be used by project managers who need to know the status of project reports submitted by employees. In addition, project managers can view pivot charts and grids for the projects that they manage.

The number of weeks that the system considers when displaying status reports is determined on the My Preferences - Status Reports Page.

Project Status Reports Page (pivot)

Use the Project Status Report page (PGM_SR_EE_FL) to view all status reports for the projects that are in your projects list. This page is displayed as a pivot grid.

Navigation:

Fluid Home, and then **Project Management**, and then **Project Status Report**

This example illustrates the fields and controls on the Project Status Reports page.

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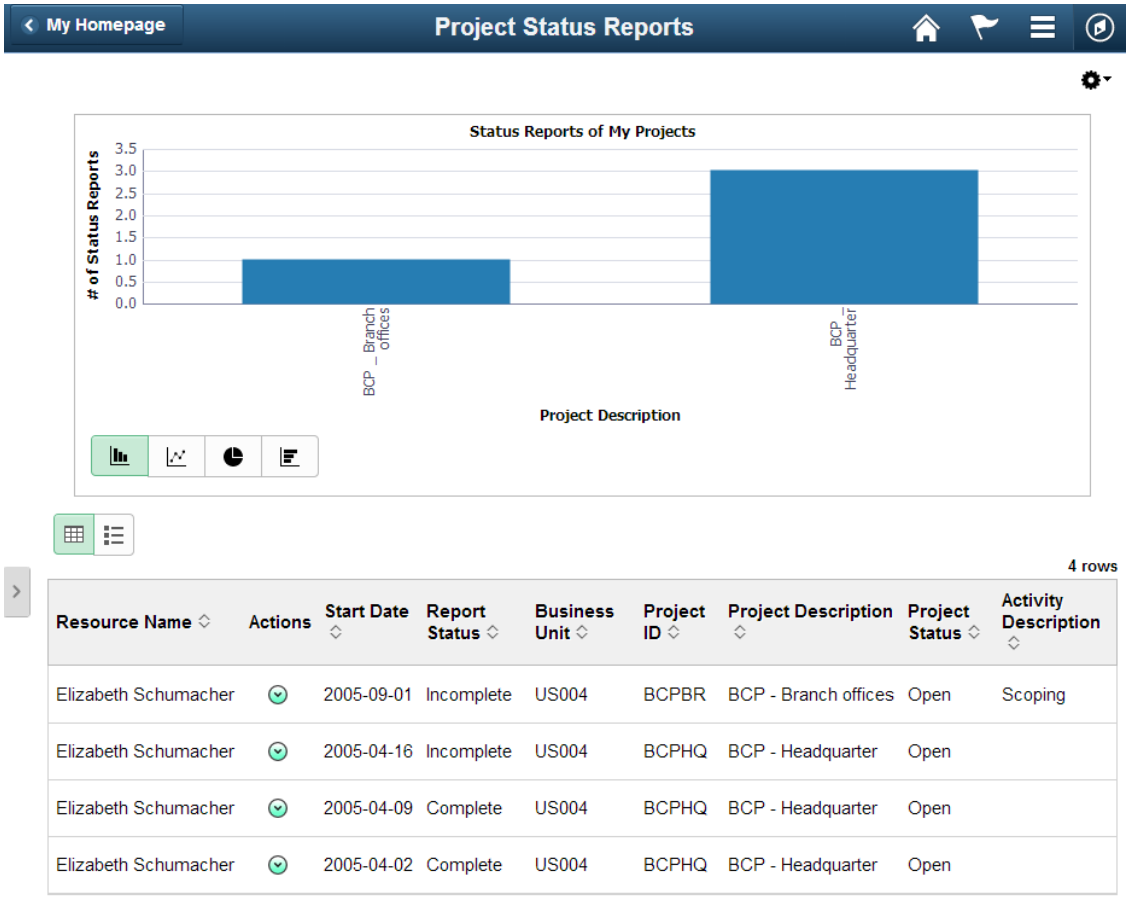

Use this page to view status reports to all projects to which you are assigned.

Field or Control	Description
(options menu icon)	Select the Options Menu icon to access these options: • View Pivot Grid • Update Filters • Export Data • Chart Options • Save
(item on chart)	Select a project on the chart to view the grid below the chart for only the selected project.
(related actions icon)	Click the Actions icon to access these options: • *View Edit Report:* Select this option to access the Edit Status Report Page. • View Resource Detail: Select this option to access the View Resource Details Page. • Notify Resource: Select this option to access the Application Fundamentals: Notify Page for a resource.

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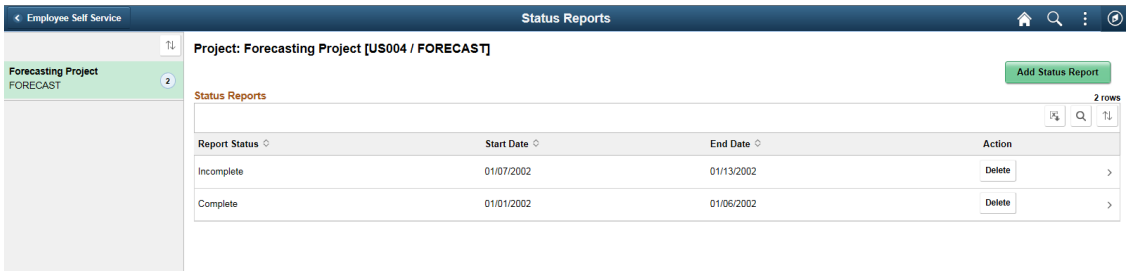
Project Status Reports Page

Use the Project Status Reports page (PGM_SR_UPD_FL) to view all status reports for the projects that are assigned to you.

Navigation:

Fluid Home, and then **Employee Self Service**, and then **Status Reports**.

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



Field or Control	Description
Add Status Report	Click this button to access the New Status Report page.
(object on row)	Click an object on the row to access the Edit Status Report Page.
Delete	Click this button to delete the status report. The system displays a verification message to ensure that you want to delete the report.
	Select to download the search results to Microsoft Excel spreadsheet.
	Select to find a string in the current page.
	Select to sort the data within the Search Results grid.

Edit Status Report Page

Use the Edit Status Report page (PGM_SR_UPD_FL) to view and edit the status of projects that are assigned to you.

Navigation:

Fluid Home, and then **Employee Self Service**, and then **Status Reports**. Click a row in the Forecasting project section.

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

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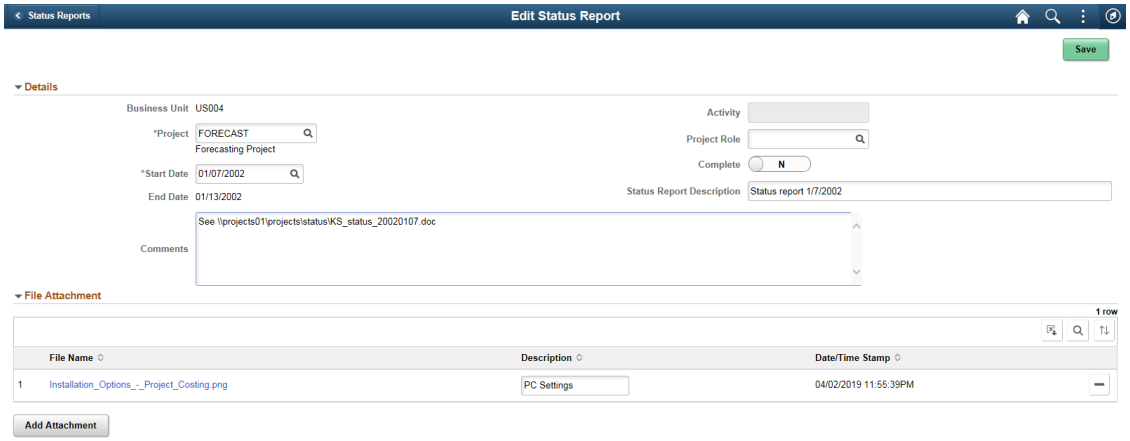


Use this page to update the status of a project. Some fields cannot be changed such as the business unit and the end date. Be sure to click the Save button to save all changes.

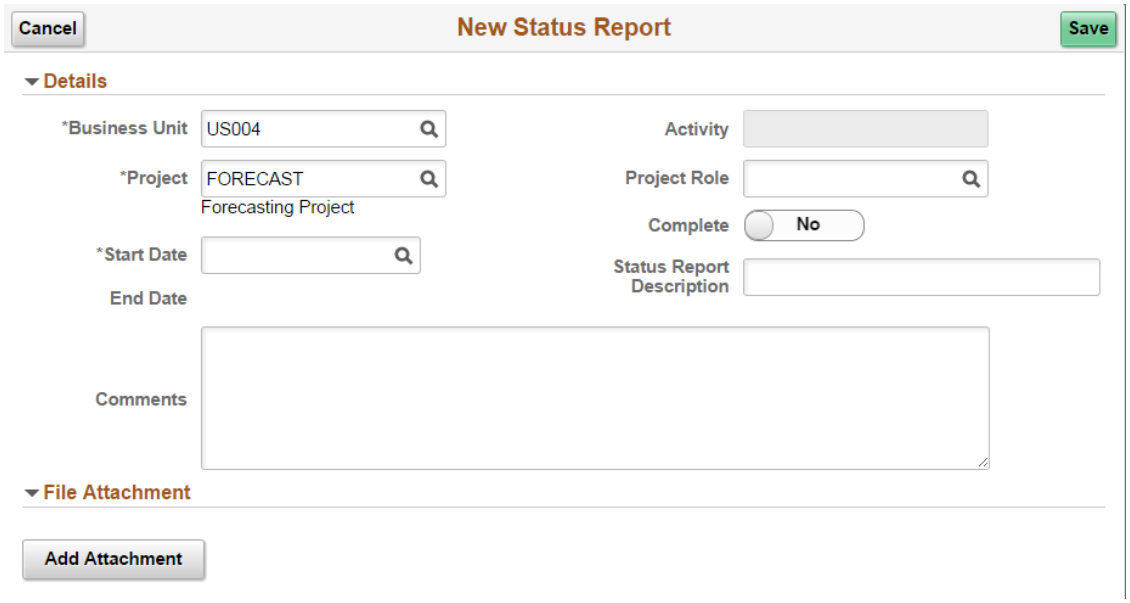
New Status Report Page

Use the New Status Report page (PGM_SR_UPD_FL) to create a status report for one of your projects.

Navigation:

Fluid Home, and then **Employee Self Service**, and then **Status Reports**. Click the Add Status Report button.

This example illustrates the fields and controls on the New Status Report page.



Use this page to create a new status report for one of your projects. Be sure to click the Save button to save the report.

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Reviewing Project Data Compression Using PeopleSoft Fluid

The Project Costing Compression process enables users to compress large amounts of project costing transactional data. PeopleSoft provides organizations increased visibility into the compression process through a fluid user interface and the Projects Ready for Compression pagelet in the Projects WorkCenter. Organizations can status their projects as available for compression and simulate the results of the compression process before executing the actual compression process. The estimate helps organizations anticipate the reduction in transactional rows before the process is run.

Page Used to Compress Project Data

Page Name	Definition Name	Usage
PC Compress Projects Page	PTPG_NUI_VWR	Used to view the list of projects that are eligible for compression.

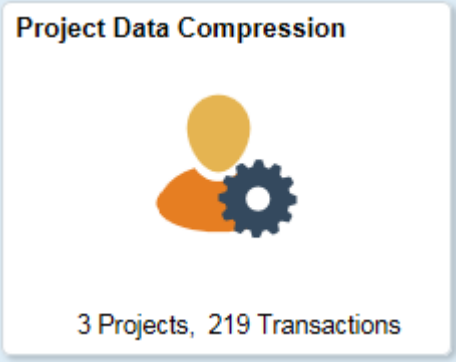
PC Compress Projects Page

Use the PC Compress Projects page (PTPG_NUI_VWR) to view the list of projects that are eligible for compression. This page can be accessed using the Project Data Compression tile. The Project Data Compression tile displays the number of projects that are eligible for compression and the number of uncompressed transactions in the project resource table.

Navigation:

Fluid Home, and then **Project Management**, and then **Proj Data Compression**

This example illustrates the fields and controls on the Project Data Compression tile. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the PC Compress Projects Fluid page. You can find definitions for the fields and controls later on this page.

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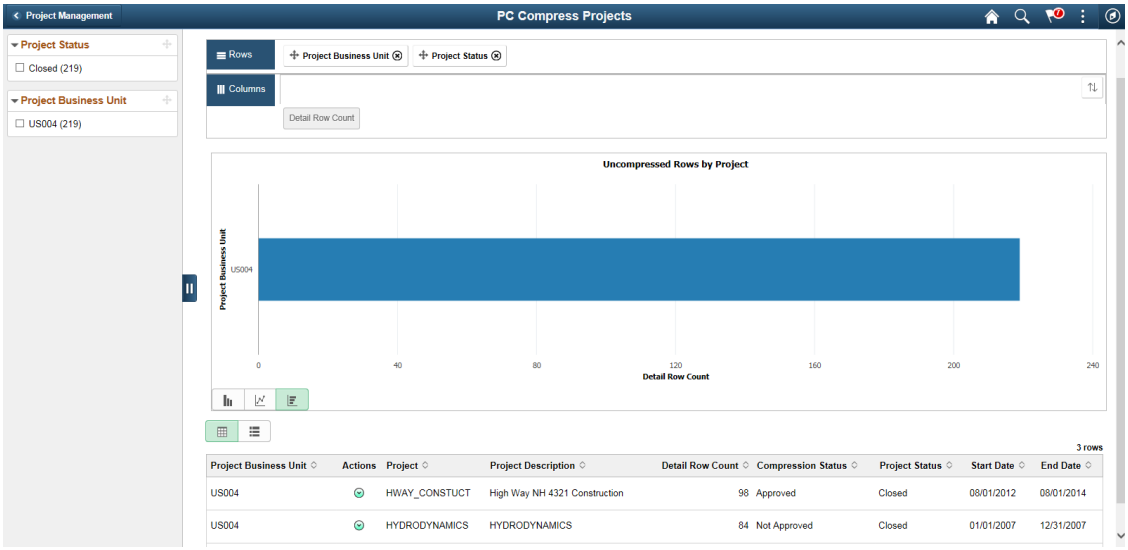

Field or Control	Description
Actions	Click to access the Project Compress Projects page where the selected project can be approved for compression.
Compression Status	Displays one of the following compression status: • Approved - Project is approved for compression. • Not Approved - Project not approved for compression. Project owner has to approve from the Projects WorkCenter page. • Previously Compressed - Project has already been compressed. The list of projects for compression on the Projects WorkCenter uses data stored in the materialized view PC_PRJ_TRANS_MV. The materialized view must be refreshed to view information on the WorkCenter and fluid tile. Projects with a status that is eligible for compression are included in the materialized view. If a project status is updated, the materialized view must be refreshed in order to view the project on the WorkCenter and fluid tile. See *PeopleTools: Using Materialized Views*.

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Creating and Modifying Reports in PeopleSoft Project Costing

Understanding Report Summarization

The Report Summarization process summarizes rows in the Project Transaction table (PROJ_RESOURCE) into a smaller Project Transaction Reporting table (PC_RPO) for enhanced performance. Creating reports by using report summarization is a three-step process:

1. Create a Report Summarization group that contains the distinct fields that you want to summarize from the Project Transaction table.
2. Run the Report Summarization process to populate the Project Transaction Reporting table.
3. Use PSQuery, BI Publisher, or nVision to create the report.

You can restrict the level of data that users can access by first enabling **Allow Multiple Report Summary** and then enabling project-level security. When enabled, the **Allow Multiple Report Summary** option populates the Project Transaction Reporting table with the operator ID of the individual making the request.

Delivered PeopleSoft Project Costing reports use data from the Project Transaction Reporting table instead of the Project Transaction table.

This topic discusses:

- Date options.
- Project-level security in Report Summarization.

Date Options

The Report Summarization process uses the calendar that is specified in the **Reporting Roll Up Calendars** group box on the Installation Options - Project Costing page. Additionally, it uses the *01/01/1900* date as a wildcard value. For example, if you use a date option of *Accounting Date,* the transaction date in the Project Transaction table is irrelevant. Therefore, the system assigns the wildcard value of *01/01/1900* to the field.

This table shows an example of the rules that the Report Summarization process uses to assign accounting and transaction dates. Assume that the accounting date and transaction date are 09/10/2005:

Date Option	Reporting Interval	Transaction Date in PC_RPO	Accounting Date in PC_RPO
Accounting Date	Daily	01/01/1900	09/10/2005
Accounting Date	Monthly	01/01/1900	09/30/2005
Accounting Date	Quarterly	01/01/1900	10/31/2005

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Date Option	Reporting Interval	Transaction Date in PC_RPO	Accounting Date in PC_RPO
Accounting Date	Yearly	01/01/1900	12/31/2005
Transaction Date	Daily	09/10/2005	01/01/1900
Transaction Date	Monthly	09/30/2005	01/01/1900
Transaction Date	Quarterly	10/31/2005	01/01/1900
Transaction Date	Yearly	12/31/2005	01/01/1900
All	Inception	01/01/1900	01/01/1900

Project-Level Security in Report Summarization

The Report Summarization process enforces team, user, or permission list security for projects if you activate project-level security on the Security Options page and activate the **Allow Multiple Report Summary** option on the Installation Options - Project Costing page.

This table lists security options that you can establish for the Report Summarization process:

Project-level Security	Allow Multiple Report Summary	Report Summarization Process Functionality
Activated	Activated	The process refreshes the Project Transaction Reporting table based on the row-level security of the user who is running the process or, in other words, based on permission lists or on individual users. The Report Summarization process selects only those rows for which the user has security access. The process refreshes summary rows only for the user who is running the process. Summary rows that other users create remain unchanged in the Project Transaction Reporting table.
Not activated	Activated	The process uses all rows in the Project Transaction table to refresh the Project Transaction Reporting table for the user who is running the process. Summary rows that other users create remain unchanged in the Project Transaction Reporting table.
Activated	Not activated	The process refreshes the entire Project Transaction Reporting table each time the Report Summarization process runs. The process is not subject to project-level security.
Not activated	Not activated	Same as above.

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Related Topics

- Defining Project Security
  To set up project row-level security, use the following components:
- Application Fundamentals: Installation Options - Project Costing Page

Creating and Modifying Reports Using the Report Summarization Process

Pages Used to Create Reports Using the Report Summarization Process

Page Name	Definition Name	Usage
Report Summarization Options Page	PC_RPO_GRP	Create report summarization groups to summarize Project Transaction table rows.
Reporting Options Page	PC_RPO	Run the Report Summarization process to refresh the Project Transaction Reporting table.

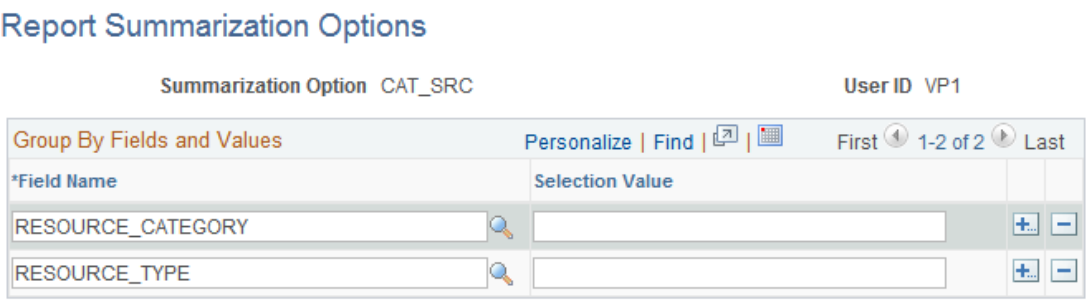
Report Summarization Options Page

Use the Report Summarization Options page (PC_RPO_GRP) to create report summarization groups to summarize Project Transaction table rows.

Navigation:

Project Costing, and then **Reports**, and then **Summary**, and then **Report Summarization Options**

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



To set up report summarization groups for reporting, use the Report Summarization Options component (PC_RPO_GRP).

The Report Summarization process automatically summarizes these fields for all rows in the Project Transaction table:

- BUSINESS_UNIT

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- PROJECT_ID
- ACTIVITY_ID
- ANALYSIS_TYPE
- CURRENCY_CD

Use this page to create additional group by and filter criteria for the Report Summarization process. In this example of the Report Summarization Options page, *ACCOUNT* and *AFFILIATE* are included in the group by criteria, but only for transaction rows in the Project Transaction table that have an ACCOUNT value of *6005423* and AFFILIATE of *94210.*

Field or Control	Description
Field Name	Enter fields that you want the Report Summarization process to summarize in the Project Transaction Reporting table. Available values are predefined on the Report Summarization Fields table (PC_RPO_VAL_GFLD). You can enter a maximum of 25 field names for a report summarization group.
Select Value	Enter a value to restrict the Report Summarization process to summarize only rows with the specific field value. Leave the field blank or enter only a wildcard (the percent symbol) for the process to summarize all rows for the field. You can enter a partial wildcard. For example, enter *ABC%* for the process to select all values that begin with ABC.

Related Topics

- PeopleSoft Project Costing Reports: A to Z
  This topic provides a table that lists the PeopleSoft Project Costing reports, sorted alpha-numerically by report ID.

Reporting Options Page

Use the Reporting Options page (PC_RPO) to run the Report Summarization process to refresh the Project Transaction Reporting table.

Navigation:

Project Costing, and then **Reports**, and then **Summary**, and then **Summary Reporting Options**

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

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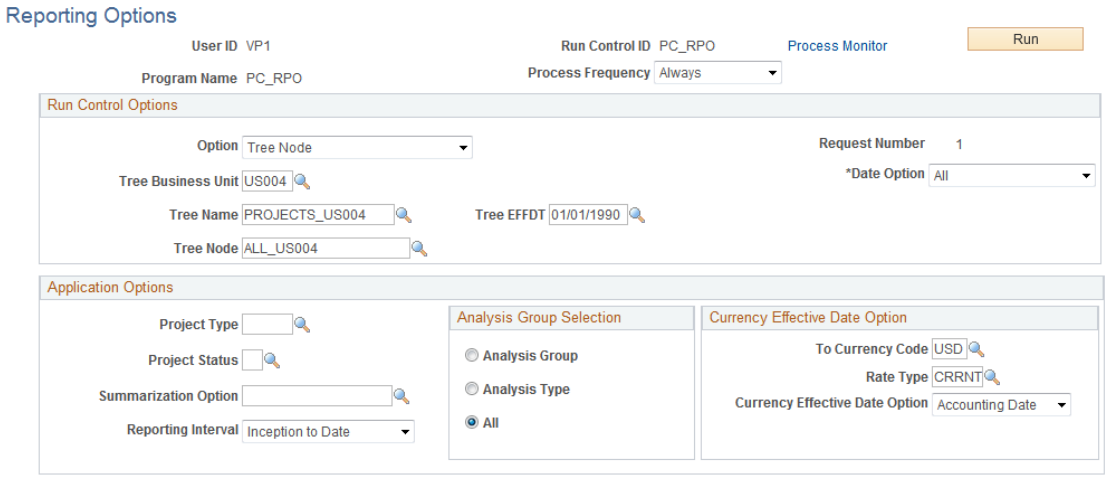

Field or Control	Description
Option	Select the option to summarize data for all transactions or specific transactions. Available values are: *All:* Creates report summary rows for all business units, projects, and activities. *Business Unit:* Creates report summary rows for the specified business unit. *Business Unit/Project:* Creates report summary rows for the specified business unit and project. *Business Unit/Project/Activity:* Creates report summary rows for the specified project business unit, project, and activity. *Tree Node:* Creates report summary rows for the specified tree business unit, tree name, tree EFFDT (effective date), and tree node.

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Field or Control	Description
Date Option	Select the type of date that the Report Summarization process uses to select rows to summarize. The date option and reporting interval values determine the accounting date and transaction date that the Report Summarization process sends to the Project Transaction Reporting table. Available options are: *Accounting Date:* The Report Summarization process summarizes rows with an accounting date that falls within the specified range. The **From Date** and **Through Date** fields appear for you to enter the accounting date range. The default value for the **From Date** and **Through Date** fields is the current date. You can override the default value. If you select a date option of *Accounting Date,* the process assigns a transaction date of *01/01/1900* as a default value in the Project Transaction Reporting table. *All:* The process evaluates rows with any date that meet the run control criteria. If you select a date option of *All,* the process assigns an accounting date and transaction date of *01/01/1900* as a default value in the Project Transaction Reporting table. *Transaction Date:* The process summarizes rows with a transaction date that falls within the specified range. The **From Date** and **Through Date** fields appear for you to enter the transaction date range. The default value for the **From Date** and **Through Date** fields is the current date. You can override the default value. If you select a date option of *Transaction Date,* the process assigns an accounting date of *01/01/1900* as a default value in the Project Transaction Reporting table. **Note:** You must summarize by the transaction date to run these delivered reports: Project Financial Report (PCPL1000) Project Transaction Report (PCPL2000)
Project Type	Select the type of projects for the process to include in the summary. Leave the field blank to include all project types. Available values are defined on the Project Types page. See Project Types Page.
Project Status	Select the status of projects for the process to include in the summary. Leave the field blank to include all project statuses. Available values are defined on the Project Definitions - Status page. See Status Types Page.
Summarization Option	Select a summarization option from the available values that are defined on the Report Summarization Options page.

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Field or Control	Description
Reporting Interval	Select the summarization level for the date that is selected above. Available values are: *Daily:* Select to summarize data by using a daily time interval. The process uses the accounting or transaction date (based on the date option) from the Project Transaction table. *Inception:* Select *Inception* to summarize all rows. When you select *Inception*, you must select a **Date Option** of *All.* *Monthly:* Select to summarize data by using a monthly time interval. The process assigns an accounting or transaction date (based on the date option) of the last day of the month that contains the date from the Project Transaction table. *Quarterly:* Select to summarize data by using a quarterly time interval. The process assigns an accounting or transaction date (based on the date option) of the last day of the quarter that contains the original date from the Project Transaction table. *Yearly:* Select to summarize data by using a yearly time interval. The process assigns an accounting or transaction date (based on the date option) of the last day of the year that contains the original date from the Project Transaction table.

Report Summarization Example

This is an example of a process with a date option of *Accounting Date* and a reporting interval of *Quarterly.*

Three rows on the Project Transaction table are combined into one row on the Project Transaction Reporting table. Each row has the dates that are shown in the following table. The process uses the accounting date to select rows; the reporting interval is quarterly. Assume that the second quarter is from April 1, 2005, through June 30, 2005.

Row Number	Trans Date	Accounting Date	Transaction Amount
1	04/02/2005	04/02/2005	100 USD
2	05/06/2005	05/06/2005	50 USD
3	06/21/2005	06/21/2005	200 USD

The resulting PC_RPO record appears as follows:

Row Number	Trans Date	Accounting Date	Transaction Amount
1	01/01/1900	06/30/2005	350 USD

Related Topics

- PeopleSoft Project Costing Reports: A to Z
  This topic provides a table that lists the PeopleSoft Project Costing reports, sorted alpha-numerically by report ID.

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Modifying the Appearance of the SQR Project Financial Report and Project Transaction Report

Pages Used to Modify the Appearance of the SQR Project Financial Report and Project Transaction Report

Page Name	Definition Name	Usage
Configure SQR Report - Fields - 1 to 5 Page	SQR_FIELDS_01	Modify the report title, field lengths, and column headers for report IDs PCPL1000 and PCPL2000.
Configure SQR Report - Fields - 6 to 10 Page	SQR_FIELDS_02	Modify the report title, field lengths, and column headers for report ID PCPL2000.
Configure SQR Report - Summed Fields Page	SQR_SUMMED_01	Modify the column header for the summed amount for report IDs PCPL1000 and PCPL2000.
Configure SQR Report - Break Levels Page	SQR_BREAKS_01	Modify the descriptive labels for the break levels in report IDs PCPL1000 and PCPL2000.

Configure SQR Report - Fields - 1 to 5 Page

Use the Configure SQR Report - Fields - 1 to 5 page (SQR_FIELDS_01) to modify the report title, field lengths, and column headers for report IDs PCPL1000 and PCPL2000.

Navigation:

Project Costing, and then **Reports**, and then **Configure SQR Report**, and then **Fields - 1 to 5**

This example illustrates the fields and controls on the Configure SQR Report - Fields - 1 to 5 page. You can find definitions for the fields and controls later on this page.

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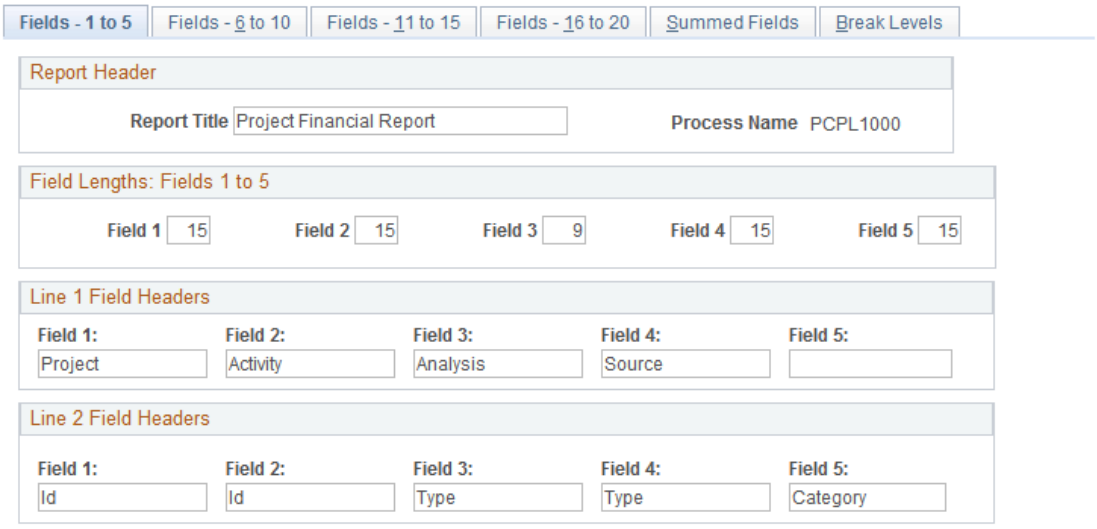

Developers can modify the appearance of the delivered Project Financial Report (PCPL1000) and Project Transaction Report (PCPL2000) by using the SQR Report Definition component (SQR_REPORT_DEFN).

> **Important**
>
> You must modify the corresponding SQR report program if you reorder or remove fields. However, you do not need to modify the corresponding SQR report program if you use the pages in the SQR Report Definition component to modify the report title, field lengths, column headers, and descriptive labels.

Report Header

Modify the title that appears at the top of each report page. You can change the report title on any page in the SQR Report Definition component.

Field Lengths: Fields <range>

Modify the display length of the columns that appear on the report.

Line 1 Field Headers and Line 2 Field Headers

Modify the first and second lines of the column headers that appear on the report.

For example, you can change the value in **Field 4** to *Transaction* in the **Line 1 Field Header** group box. Then change the value in **Field 4** to *Source* in the **Line 2 Field Header** group box. As a result, the fourth column header on the report will appear as *Transaction Source.*

Configure SQR Report - Summed Fields Page

Use the Configure SQR Report - Summed Fields page (SQR_SUMMED_01) to modify the column header for the summed amount for report IDs PCPL1000 and PCPL2000.

Navigation:

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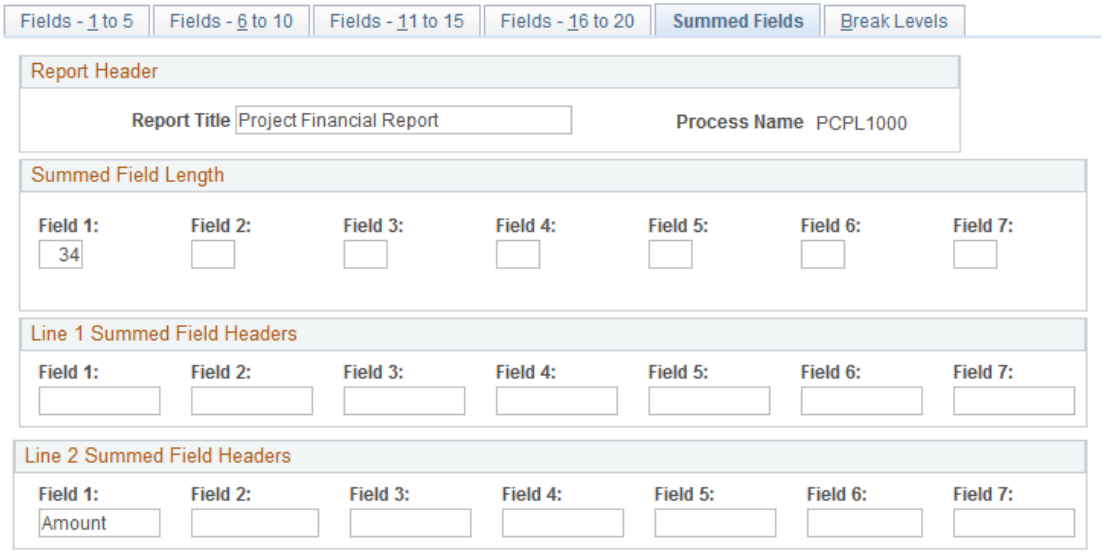
Project Costing, and then **Reports**, and then **Configure SQR Report**, and then **Summed Fields**

This example illustrates the fields and controls on the Configure SQR Report - Summed Fields page. You can find definitions for the fields and controls later on this page.



Summed Field Length

Modify the display length of the summary amount column in **Field 1.**

Line 1 Summed Field Headers and Line 2 Summed Field Headers

Modify the first and second lines of the summary amount column header in **Field 1.**

For example, you can enter a value of *Summary* for Field 1 in the **Line 1 Summed Field Headers** group box, and accept the default value in the **Line 2 Summed Field Headers** group box. As a result, the column header will appear as *Summary Amount* on the report.

Configure SQR Report - Break Levels Page

Use the Configure SQR Report - Break Levels page (SQR_BREAKS_01) to modify the descriptive labels for the break levels in report IDs PCPL1000 and PCPL2000.

Navigation:

Project Costing, and then **Reports**, and then **Configure SQR Report**, and then **Break Levels**

This example illustrates the fields and controls on the Configure SQR Report - Break Levels page. You can find definitions for the fields and controls later on this page.

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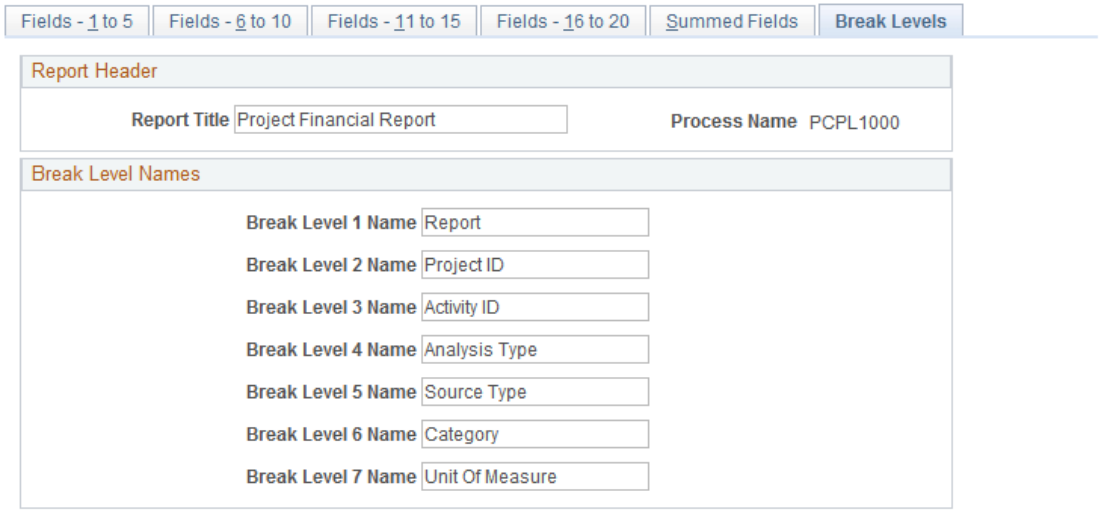

Break Level Names

Modify the labels that describe the break levels that appear on the report. For example, in the **Break Level 7 Name** field, you can change the *Unit Of Measure* label to *UOM.*

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Configuring Batch and Online Processes

Configuring Temporary Tables for Batch and Online Processing

When you run Application Engine processes in parallel, you risk data contention and deadlocks on temporary tables. To avoid this, PeopleTools enables you to dedicate specific instances of temporary tables for each process. When a PeopleSoft Application Engine manages a dedicated temporary table instance, it controls the locking of the table before use and the unlocking of the table after use.

When you decide how many temporary table instances to dedicate for a process, consider the number of temporary tables that the process uses. More instances result in more copies of the temporary tables on the system. For example, if a process uses 25 temporary tables and you have 10 instances for a process, you will have 250 temporary tables on the system.

If you run processes in parallel and all of the dedicated temporary table instances are in use, the performance of the process decreases. You must find a balance that works for your organization.

> **Note**
>
> When you specify the number of instances, PeopleSoft Application Designer displays a list of the temporary tables for the process. Use the list to determine how many temporary tables that each process uses.

Specify how many temporary table instances to dedicate for each of these Application Engine processes in PeopleSoft Project Costing:

- PC_AM (Asset Management Interface)
- PC_AP_TO_PC (Payables to Project Costing)
- PC_BUD_SUM (Refresh Budget Summary)
- PC_BUDGET_IN (Budget Loader)
- PC_COPY_AE (Transaction Copy)
- PC_CPY_AELIB (Template Application Library)
- PC_CRTMPL_AE (Create Project from Template)
- PC_DEL_UTIL (Project Delete Utility)
- PC_EX_TO_PC (Expenses to Project Costing)
- PC_EXPRET_AM (Express Retirement)
- PC_EXPRSS_AM (Express Capitalization)
- PC_FC_CALC (Forecast Variance Calculation)
- PC_FND_DIST (Funds Distribution)

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- PC_FUND_RES (Funds Finalization)
- PC_IMTMPL_AE (Import from Template)
- PC_IN_TO_PC (Inventory to Project Costing)
- PC_INTFEDIT (Load Third-Party Transactions)
- PC_KK_TO_PC (Commitment Control to Project Costing)
- PC_MULTI_CUR (Multicurrency Conversion)
- PC_PO_TO_PC (Purchasing to Project Costing)
- PC_POADJUST (Purchasing Adjustment)
- PC_PRICING (Pricing)
- PC_PROFIT_AE (Project Profitability Calculation)
- PC_REJECT_AM (Reject Pending Assets)
- PC_RESADJUST (Transaction Adjustment)
- PC_RETIRE_AM (Asset Management Asset Retirement)
- PC_REVERS_AM (Reverse Distributed Assets)
- PC_RPO (Report Summarization)
- PC_SUM_RFSH2 (Refresh Project Transaction Summary Table)
- PC_TO_KK (Project Costing to Commitment Control)
- PC_SVTMPL_AE (Save as Template)
- PC_SUM_RFSH (Refresh Summary Tables)
- PC_VALN_CALC (Project Valuation Calculation)
- PC_VAR_PRICE (Variance Pricing)
- PC_WM_TO_PC (Maintenance Management Tools Usage)
- PSA_ACCTGGL (Process Project Accounting)
- PSA_SHARING (Sharing)

The PeopleTools documentation discusses the use of temporary tables in detail and discusses how to specify the number of instances. See the product documentation for *PeopleTools: Application Engine*

If you run any of the PeopleSoft General Ledger COBOL processes, configure the temporary tables for those processes as well.

Related Topics

- PeopleSoft General Ledger: Using Non-Shared Tables

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Running Batch Processes Using Autopilot

Page Used to Run Batch Processes Using Autopilot

Page Name	Definition Name	Usage
Process Autopilot Page	FMSAUTOPILOT_REQ	Set up Autopilot to perform recurring batch processing using PeopleSoft Process Scheduler.

See the product documentation for *PeopleTools: Process Scheduler*

Understanding the Autopilot Feature

The Autopilot feature provides added flexibility to the PeopleSoft Process Scheduler that is used for performing batch processing. While PeopleSoft Process Scheduler provides a means of scheduling processing using a *batch window,* for example, scheduling a specific batch process to run daily at a given time, with Autopilot you can set up *recurring processing.* Recurring processing enables you to run processes at scheduled intervals throughout the day if certain criteria are met. The criteria includes minimum and maximum wait times, and minimum and maximum ready transaction counts. For example, using Autopilot, you can set up an Application Engine process to check for transactions to process every 20 minutes and to run only if at least 60, but not more than 500, transactions are available to process.

In addition, the Autopilot can run multiple instances of a process in parallel. For example, you can set up a process to run multiple times to process transactions for different business units simultaneously.

Thus, by replacing batch-window processing with recurring parallel processing, organizations can reap the benefits of a more robust, near real-time data processing environment.

Autopilot Batch Processing Setup

These are the four main steps to set up Autopilot batch processing:

1. Specify the process request parameters on the run control page for each process to run on Autopilot.

   For example, specify the process request parameters for importing transactions from PeopleSoft Expenses to PeopleSoft Project Costing on the Expenses run control page (PC_EX_TO_PC).

2. In PeopleSoft Process Scheduler, create a recurrence definition for scheduling the Autopilot process.

3. Add and define processes for Autopilot to run on the Process Autopilot page, and click **Run.**

4. On the Process Scheduler Request page, initiate a request to run the Autopilot process that you created in step 3 using the recurrence defined in step 2.

PeopleSoft Project Costing Processes Available for Autopilot

These PeopleSoft Application Engine processes can be set up to run throughout the day based on a PeopleSoft Process Scheduler recurrence definition, minimum and maximum wait times, and minimum and maximum ready transaction counts:

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Program Name	Application Engine Process	Navigation
Billing to Project Costing	PC_BI_TO_PC	Project Costing, Revenue Collection, Retrieve Billing Items
Budgeting to Project Costing	PC_BD_TO_PC	Project Costing, Budgeting, Retrieve From Budgeting
Contracts to Project Costing	PC_CA_TO_PC	Project Costing, Revenue Collection, Retrieve Revenue from Contract
Commitment Control to Project Costing	PC_KK_TO_PC	Project Costing, Budgeting, Retrieve Commitment Control
Expenses to Project Costing (for Expenses) *	PC_EX_TO_PC	Project Costing, Cost Collection, Expenses
Expenses to Project Costing (for Time) *	PC_EX_TO_PC	Project Costing, Cost Collection, Expenses
General Ledger to Project Costing *	PC_GL_TO_PC	Project Costing, Cost Collection, General Ledger
Inventory to Project Costing	PC_IN_TO_PC	Project Costing, Cost Collection, Inventory
Order Management to Project Costing	PC_OM_TO_PC	Project Costing, Cost Collection, Cost Collect Order Mgmt
Payables to Project Costing	PC_AP_TO_PC	Project Costing, Cost Collection, Payables
Project and Activity Loader *	PC_INTF_GEN	Project Costing, Third Party Integration, Load Projects and Activities
Purchasing to Project Costing (for Purchase Orders) *	PC_PO_TO_PC	Project Costing, Cost Collection, Cost Collect Purchasing
Purchasing to Project Costing (for Requisitions) *	PC_PO_TO_PC	Project Costing, Cost Collection, Purchasing
Receivables Adjustments	PC_AR_TO_PC	Project Costing, Revenue Collection, Adjustments from Receivables
Services Procurement to Project Costing (for Expenses) *	PC_SP_TO_PC	Project Costing, Cost Collection, Services Procurement
Services Procurement to Project Costing (for Time) *	PC_SP_TO_PC	Project Costing, Cost Collection, Services Procurement
Time and Labor to Project Costing *	PC_TL_TO_PC	Project Costing, Cost Collection, Time and Labor
Transaction Loader *	PC_INTFEDIT	Project Costing, Third Party Integration, Load Transactions

* See Autopilot Run Control Process Limitations and Exceptions that follow.

Process Autopilot Page

Use the Process Autopilot page (FMSAUTOPILOT_REQ) to set up Autopilot to perform recurring batch processing using PeopleSoft Process Scheduler.

Navigation:

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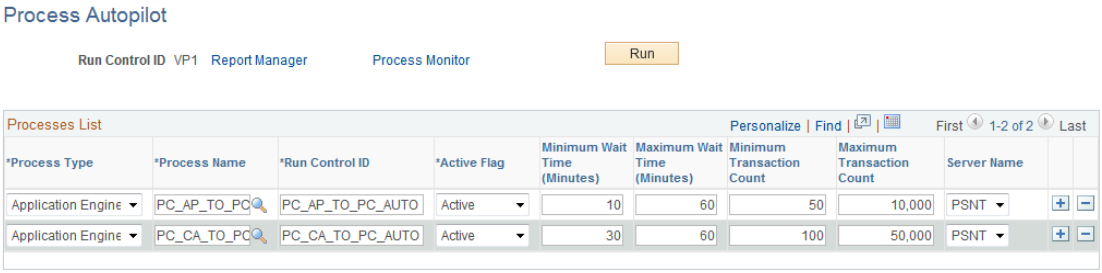
Background Processes, and then **Process Autopilot**, and then **Process Autopilot**

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



Field or Control	Description
Process Type	Select *Application Engine* for PeopleSoft Project Costing.
Process Name	Enter the process to run. Not all processes can use Autopilot. For a list of available PeopleSoft Project Costing processes that can be run using Autopilot, see PeopleSoft Project Costing Processes Available for Autopilot. See Understanding the Autopilot Feature.
Active Flag	Select *Active* to enable the process. Select *Disable* to disable an individual process even after Autopilot has started.
Minimum Wait Time (Minutes)	Enter the minimum number of minutes that must elapse between processing runs.
Maximum Wait Time (Minutes)	Enter the maximum number of minutes that can elapse between process runs, regardless of whether the **Minimum Transaction Count** parameter is satisfied.
Minimum Transaction Count	Enter the fewest number of transactions that must be present for processing to occur, unless the **Maximum Wait Time** parameter is surpassed.
Maximum Transaction Count	Enter the maximum number of transactions that can be processed. If the amount of transactions waiting to be processed exceeds this amount, the process will not run in Autopilot regardless of the other settings.

Autopilot Run Control Process Limitations and Exceptions

With the exception of the PeopleSoft Application Engine processes listed in this topic, Autopilot includes only the *All* and *Business Unit* option values (that are selected on their respective run control pages) when determining transaction counts. In other words, except for the processes listed here, transactions in the staging tables defined by the same business unit, regardless of their project or activity values, will be summed together to determine whether they will be processed, based on the total number of transactions to be processed.

For example, assume that the first Payables to Project Costing process is defined on the Accounts Payable run control page by business unit US001 and project *Implement,* and the

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second Payables to Project Costing process is defined by business unit US001 and project *Configure.* When determining transaction counts, Autopilot ignores the project field and adds the total number of all transactions for US001 regardless of the project to which they will be charged. Thus, the count includes transactions for the Implement and Configure projects and for any other project that belongs to business unit US001.

Application Engine Process	Exception
PC_EX_TO_PC PC_SP_TO_PC	Both the Expenses to Project Costing and Services Procurement to Project Costing processes always load both time rows and expense rows. Thus, the transaction count sums the rows staged for both time and expense. If you specify a minimum transaction count for Expenses to Project Costing process of 100, and 25 time rows and 75 expense rows are ready to process, Autopilot launches the Expenses to Project Costing process. The same is true for the Services Procurement to Project Costing process.
PC_GL_TO_PC	The general ledger business unit will also be considered for defining a process when the system calculates the transaction counts. Thus, processes defined with the same project business unit, but different general ledger business units, are treated as two separate processes for the purpose of transaction counts.
PC_INTF_GEN	This process does not use project business unit as a run control option. It does enable you to specify a range of interface IDs to process that are considered in the transaction count. It also enables you to choose whether to load projects, activities, or both. If the project only option is selected, only the pending projects are counted. If the activity only option is selected, only the pending activities are counted. If both projects and activities are selected, both are included in the transaction count.
PC_PO_TO_PC	The requisition and purchase order processes are both handled by the Purchasing to Project Costing process. The run control page for this process enables you to process either requisitions or purchase orders, or to process both simultaneously. If you specify either requisitions or purchase orders individually, only those types of transactions are included in the transaction count. If you choose to process both, however, the transaction count sums the rows staged for both requisitions and purchase orders. For example, if you specify a minimum transaction count for Purchasing to Project Costing process of 100, and indicate that both purchase orders and requisitions will be processed, Autopilot launches the Purchasing to Project Costing process if 25 requisition rows and 75 purchase order rows are ready to process.

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Application Engine Process	Exception
PC_TL_TO_PC	This process does not use project business unit as a run control option. The only processing option considered for transaction counts is the *Process Actuals* option. The two other options process from tables or flat files and are not available to the Autopilot process. **Note:** PeopleSoft Project Costing has a **Load Time Automatically** installation option. If this option is activated, the Time and Labor to Project Costing process will not pick up rows with actual values because all rows will already be streamlined into PeopleSoft Project Costing. In this situation, adding the Time and Labor to Project Costing process to the Autopilot serves no purpose.
PC_INTFEDIT	In addition to the project business unit, this process enables you to specify a range of interface IDs to process. The specified range is considered in the transaction count.

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PeopleSoft Project Costing Web Libraries

Understanding Web Libraries

A web library is a derived or work record whose name starts with WEBLIB_. PeopleSoft embeds all internet scripts (iScripts) in records of this type. An iScript is a specialized PeopleCode function that generates dynamic web content. Administrators must make sure that users have the proper access to web libraries. For example, the default navigation system for PeopleSoft Pure Internet Architecture users is implemented by using a web library. If users do not have the proper authorization to the web library and its associated scripts, then they won't have proper access to the system. If users are not authorized to a particular web library or iScript, then they can't invoke it. After you add a web library, you set the access for each script function individually. Invoking an iScript requires the assembly of a URL. Developers assemble the URL by using PeopleCode.

See the product documentation for *PeopleTools: Portal Technology*, *PeopleTools: PeopleCode API Reference*, and *PeopleTools: Security Administration*

PeopleSoft Project Costing Web Libraries

This table lists the web libraries that are used and delivered with PeopleSoft Project Costing:

Web Library Name	Description
WEBLIB_PC_MSP	Used in the integration of PeopleSoft Project Costing and Microsoft Project as an XML catcher.
WEBLIB_PORTAL	See the product documentation for *PeopleTools: Portal Technology*, regarding Web Libraries.
WEBLIB_RS	Required by the PeopleSoft Resource Management Monthly Schedule page.

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PeopleSoft Project Costing Reports

PeopleSoft Project Costing Reports: A to Z

This topic provides a table that lists the PeopleSoft Project Costing reports, sorted alpha-numerically by report ID.

For more information about running these reports, refer to:

- The corresponding topic in the product documentation.
- *PeopleTools: Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*
- *PeopleTools: SQR Language Reference for PeopleSoft*

> **Note**
>
> Reports in PeopleSoft Project Costing that show project transaction data are generated from data in the Project Transactions Reporting table (PC_RPO), which you must populate beforehand.

For samples of these reports, see the Report Samples that are published with this online documentation.

Report ID and Report Name	Description	Navigation	Run Control Page
PCPL1000 Project Financial Report	View a transaction summary of all activities by analysis type, source type, category, and subcategory. (SQR) **Note:** Run the Report Summarization process (PC_RPO) by transaction date before you run the Project Financial Report.	**Project Costing**, and then **Reports**, and then **Summary**, and then **Summary Financial Report**	RUN_PCPL1000

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Report ID and Report Name	Description	Navigation	Run Control Page
PCPL2000 Project Transaction Report	View a transaction summary of all projects by analysis type, source type, category, and subcategory. (SQR) **Note:** Run the Report Summarization process by transaction date before you run the Project Transaction Report.	**Project Costing**, and then **Reports**, and then **Summary**, and then **Create Transaction Report**, and then **Transaction Summary**	RUN_PCPL2000
PCX1050 Budget to Costs Review by Period	View a list of budget-to-cost variances by budget item for each period of a project.	**Project Costing**, and then **Reports**, and then **Project Budget Review Report**	RUN_PCY1050
PCX9000 Project Funds Distribution Report	View various amounts for a project or appropriation such as the amount funded, spent, remaining, and collected. (BI Publisher)	**Project Costing**, and then **Funds Distribution**, and then **Project Funds Distribution Report**	RUN_PCX9000

Related Topics

- Understanding Report Summarization
  The Report Summarization process summarizes rows in the Project Transaction table (PROJ_RESOURCE) into a smaller Project Transaction Reporting table (PC_RPO) for enhanced performance. Creating reports by using report summarization is a three-step process:
- Creating and Modifying Reports Using the Report Summarization Process
- Modifying the Appearance of the SQR Project Financial Report and Project Transaction Report

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