

# Oracle Fusion Cloud Project Management

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**Creating and Administering  
Analytics and Reports for Project  
Management**

24D



Oracle Fusion Cloud Project Management  
Creating and Administering Analytics and Reports for Project Management

24D

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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Thanks for helping us improve our user assistance!



# 1 Overview

## About This Guide

If you administer or work with business intelligence (BI) in Oracle Applications Cloud, this guide is for you. It provides an overview of Oracle Transactional Business Intelligence and covers common BI features in your application.

For example, you can create analyses in the Reports and Analytics work area, personalize the infolets on your home page, or configure flexfields for use in analytics.

## Overview of Analytics and Reports for Project Management

Oracle Transactional Business intelligence (OTBI) involves analyzing data to gain insight into your reporting needs, gathering information to meet specific requirements, and making informed decisions.

### Using Analytics and Reports

You can use different types of predefined analytics and reports, or create and edit them, to support your business needs. Oracle Fusion Cloud Project Management offers predefined analytics and reports across various subject areas. You can use these predefined analytics and reports, or customize them based on your business needs after creating a copy.

You can use OTBI to create analytics and Oracle Analytics Publisher to create reports.

**Note:** Don't edit predefined analytics and reports directly. If you need to customize them, you can create a copy and edit the copy.

This table describes the purpose of analytics and reports.

Type	Description	Purpose
Analytic	OTBI object such as analysis or dashboard that provides meaningful data.	To help in business decision making.
Analysis	Interactive display of data, for example in a table or graph.  Also referred to as real-time analysis.	To summarize or break down simple, real-time data.  To help you make tactical decisions.
Report	Output of data in a predefined format that provides little or no interaction.	To get high-volume data in a high-fidelity output optimized for printing.

Type	Description	Purpose
	Also referred to as predefined report or output report.	For documents to support internal operations, statutory requirements, and other business needs.

## Customizing Analytics and Reports

You can create, edit, and customize analytics and reports for yourself and others if you have appropriate access.

For example, you can:

- Add or remove columns from an analysis.
- Change the branding logo on reports.
- Create an analytic dashboard to include your commonly viewed analyses.

## Setup and Administration

There are additional tasks that support creating and editing analytics and reports. For example, your implementor or administrator can:

- Configure Oracle Analytics Publisher, the tool used for generating and customizing reports.
- Define flexfields to provide custom attributes that can be used in analyses.
- Archive and move analytics and reports from one environment to another.

# Overview of Securing Analytics and Reports for Project Management

Users with appropriate roles can create and access analyses and reports based on role access to subject areas and catalog folders.

Analyses and reports are secured by applying job roles with associated duty roles to users. Duty role assignments determine access to subject areas for analyses as well as catalog folders. For information about the job and duty roles provided with Oracle Fusion Cloud Project Management and how to customize your security model by creating custom job roles and assigning duty roles to them, see *Implementing Security in Oracle Fusion Cloud Project Management* in the *Securing ERP* guide.

In addition to folder and object access, duty roles also determine data security. Each of the duty roles that provides access to subject areas and catalog folders is granted one or more data security policies that allow access to the data.



# More About Oracle Transactional Business Intelligence Components

If you want to know more about Oracle Transactional Business Intelligence components, here's what we have.

## Oracle Transactional Business Intelligence

Here's the information about the parts of Oracle Transactional Business Intelligence (OTBI) that support analysis against your transactional data.

- Create and work with analyses, dashboards, and advanced analytical content, including dashboard prompts, conditions, actions, and key performance indicators.

*[Creating Analyses and Dashboards in Oracle Transactional Business Intelligence](#)*

- Administer analyses, dashboards, and other content.

*[Administering Oracle Transactional Business Intelligence](#)*

## Oracle Analytics Publisher

Analytics Publisher is the part of OTBI you use for reports.

- Run and view reports.

*[Using Oracle Analytics Publisher in Oracle Transactional Business Intelligence](#)*

- Create and edit reports, data models, layouts, templates, subtemplates.

*[Designing Pixel-Perfect Reports in Oracle Transactional Business Intelligence](#)*

- Administer Analytics Publisher, set up data sources and delivery destinations, manage security, and move catalog objects.

*[Administering Oracle Analytics Publisher in Oracle Transactional Business Intelligence](#)*

# View Analytics, Reports, and Dashboards



There are different ways to view and work with your analytics and reports. You can view analyses, dashboards, and reports in the course of your work, on your usual pages and infolets. Or you can find them in the business intelligence catalog with the Reports and Analytics work area and the Reports and Analytics panel tab.

## View Analytics in Infolets

Use your favorite infolet pages to find analytics.

1. Use the page controls and Previous and Next icons to explore infolet pages in the home page, where they may appear in infolets with summaries and aggregations or performance metrics. You may also find infolets in some work areas.
2. Click an infolet to open a detailed analysis. So for example, if an infolet has transactions summed to a total, click it to view details of the underlying transactions.
3. Click **Done**.

## View Objects in Familiar Work Areas and Pages

Use analyses, dashboards, and reports available in your usual pages and work areas.

1. Explore your pages. Some may include analysis and report links or embedded objects, sometimes in tabs or panel tabs.
2. Some work areas have a Reports and Analytics panel tab, where you explore catalog folders for relevant analyses and reports for the work area. And if you have permission, you can map more objects to the work area if they're appropriate.
  - a. Open the panel tab.
  - b. Expand the Shared Reports and Analytics folder and explore the available content.
  - c. Click the link for any object and see its type to determine whether it's an analysis, a report, or a dashboard.
  - d. Click **View** to open the object.

## View Objects in the Reports and Analytics Work Area

Use the Reports and Analytics work area to search or browse the catalog and view any analysis, dashboard, or report you have access to. It opens at the highest level of the catalog's folder hierarchy with all objects you have marked as favorites.

Here are some things you can do in the Reports and Analytics work area.

1. Click **Navigator > Tools > Reports and Analytics**.
2. Filter and search for objects:
  - a. From the Filter list, select what you want to find.
  - b. To view objects you have marked as favorites, select **Favorites** in the list. Or select **Recent Items** to view objects you recently worked with, or a recent search to run it again. Enter a name or part of a name and click the **Search** icon.
  - c. In the search results, use the icons to identify what the objects are.
  - d. Click the name of an object to open it, or click **More** and select an action.
3. In the breadcrumbs, browse the catalog folders for analytics and reports. Click any **Hierarchical Selector** icon to select a different node for the next level in the hierarchy.
4. Mark objects as favorites.
  - o Select **Favorites** in the Saved Searches to display your favorite objects.
  - o Click the **Add Favorites** icon for an object to mark it as a favorite.
  - o Click the **Remove from Favorites** icon to remove an object from your favorites.
5. Create and edit analyses and reports.

- a. Click **Create** and select **Report** or **Analysis**.
- b. Use wizards to create your analysis or report.
6. Click the **Browse Catalog** button (or click the **More** icon for a specific report, dashboard, or analysis) to use more features.

**Note:** If you don't see an analysis in the work area, browse the catalog for it. In the Catalog, select Show Hidden Items to display any hidden analyses.

## View Analyses

An analysis queries against your company's data and answers business questions with visualizations, such as charts and tables. They may appear on your pages, or as parts of a dashboard.

1. From the catalog folders or search results, open an analysis to view.
2. Click **Refresh** to rerun the analysis and refresh its data.
3. Click **Print** and select either **Printable PDF** or **Printable HTML** to open a printable version.
4. Click **Export** to get analysis data in various formats, for example PDF, Excel, PowerPoint, comma-separated value (CSV), and XML.

**Note:** When you export data in a CSV format, dates are exported in raw format and converted to UTC time zone.

## View Grouped Analyses in Dashboards

Some analyses are grouped in dashboards to give you meaningful related information. A dashboard contains pages of analyses, prompts that filter information, and other objects.

1. From the catalog folders or search results, open a dashboard to view.
2. Select values for any dashboard prompts to filter the dashboard.
3. Click **Apply** to refine the results of all of the analyses in the dashboard.

## View Reports

Reports show data in a predefined format that's optimized for printing.

1. From the catalog folders or search results, open a report.
2. Click the **View Report** icon if you want a different format.
  - o Choose **HTML** or **PDF** to display the report in a format for printing. Because it's optimized for printing, PDF often provides the best results.
  - o You can also export the report as RTF for editing in a word processor, or as Excel or PowerPoint.
3. From the catalog folders or search results, you can also do these tasks:
  - o Click **Edit** to edit the report properties, layout, and data model.
  - o Click **Report History** to see details about past submissions of the report.
  - o Click **Schedule** to schedule the report to be run.

# Considerations for Saving Analytics and Reports

You can save analyses, dashboards, and reports in the business intelligence (BI) catalog. The catalog has a hierarchy of folders with My Folders and Shared Folders at the top, and folders like Custom under Shared Folders.

## My Folders

Save your analytics and reports in **My Folders** for personal use. When you save a new analysis, dashboard, or report in this folder, it's available in **My Folders** in the **Reports and Analytics** work area. But you can't view it in **My Folders** in the **Reports and Analytics** pane on any other work area. The only exception is when you create an analysis using the wizard in the **Reports and Analytics** pane, in which case the analysis is available in all work areas.

## Shared Folders

Save your custom analytics and reports in **Shared Folders** so that they are available to others. You must save them in the **Custom** folder which has subfolders organized by product family. You can use the **Projects** subfolder for storing these custom analytics.

Edit only copies of your analytics and reports. Directly edit predefined analytics only when necessary and ensure that all references to the analysis or dashboard are functional.

When you create a copy of predefined reports using the **Customize** option, the folder structure and permissions are also copied.

## Custom Folder

You must keep all custom objects in the **Custom** folder to:

- Ensure that customized versions of predefined analytics and reports aren't affected when patches are applied.
- Identify and locate custom objects in the **Projects** subfolder.
- Edit objects in the **Custom** folder without compromising security on the original objects.

When you copy an object into the **Custom** folder, the copied object inherits the permission settings of the **Custom** folder. Your administrator must reset the permissions on the object and the folder that it's present in.

## What happens to modified analytics and reports when a release update is applied?

Updates don't affect the Custom folder or My Folder in the catalog. Anything saved there is preserved, including the analytics and reports you edited or created. But anything saved outside those folders, in the predefined catalog, is preserved only if the update doesn't include a new version of those BI objects.

If an update includes a new version of a predefined object that you edited outside the Custom folder, the changes you made are saved as a new object. The new version from the update overwrites the existing predefined object. And a copy of the existing object (with your edits) is automatically created in the same folder, with a new name that indicates it's a new version.

If the update includes a new version of both the predefined object and a folder in its file path, the new folder name, along with the new version of the object, overwrites the existing predefined folder and object. And a copy of the existing

folder (along with your edited object) is automatically created. The folder is renamed to indicate that it's a new version, but your edited object isn't renamed.

If folders named backup\_nnn are automatically created in the catalog due to conflicts, after reviewing and resolving any conflicts, Oracle recommends that you manually delete the backup folders from the catalog. You can contact your help desk to request an automated removal if you have many folders to delete.

**Note:** Future updates won't affect renamed objects or anything within a renamed folder.



## 2 Setup and Management

### Map to Work Areas

#### Set Up the Reports and Analytics Panel Tab

The Reports and Analytics panel tab appears in many work areas, and shows analytics and reports related to the work areas. You map and unmap the objects for a specific work area from the business intelligence (BI) catalog.

Your mapping changes for a work area apply to all users who have access to it.

#### Map and Remove Objects from Your Work Area

1. Expand the Reports and Analytics panel tab.
2. Click the **Edit Settings** icon.  
You see all the analytics and reports that are currently mapped to your work area.
3. Click **Select and Add**.
4. Select the object in the catalog.
5. Click **OK**.
6. To remove any mapping, select the object and click **Remove**.
7. Click **Save**.

#### Map and Remove Objects from Any Work Area

1. In the Setup and Maintenance work area, go to the **Map Reports to Work Areas** task.
2. Select the application of the work area you want to map to.
3. Select the work area.
4. Click **Search** and see all the reports that are currently mapped to that work area.
5. Click **Select and Add**.
6. Select the object in the catalog.
7. Click **OK**.
8. To remove any mapping, select the object and click **Remove**.

**Tip:** Click **Synchronize** to remove all mappings to any objects that are no longer in the catalog. You synchronize all work areas, not just the one you're mapping.

9. Click **Save**.

#### Related Topics

- [Why can't I see analytics and reports when I edit settings for the Reports and Analytics panel tab?](#)
- [Why can't I see analytics and reports when mapping to work areas for the Reports and Analytics panel tab?](#)
- [How do I update existing setup data?](#)
- [Set Up Reports for Scheduling](#)

## Why can't I see analytics and reports when mapping to work areas for the Reports and Analytics panel tab?

Either no analytics and reports are mapped to the work area you select on the Map Reports to Work Areas page, or you don't have access to the mapped objects.

Similarly, when you're selecting an object to map, you can only see objects you have access to. Your administrator can grant access to the objects or let someone with access map them.

- Assign you roles with access to the objects you want to map.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to the objects.

## Why can't I see analytics and reports when I edit settings for the Reports and Analytics panel tab?

In the Edit Settings window, you might not see a currently mapped report because you don't have access to it.

Similarly, when you're selecting an object to map, you can only see objects you have access to. Your administrator can grant access to the objects or let someone with access map them.

- Assign you roles with access to the objects you want to map.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to the objects.

## Set Up Currency

### Currency and Exchange Rate Settings for Analytics

You can choose how currency is shown in your application. If you're running analytics on your application data, you can specify currency and exchange rate details in BI.

Currency can be set in different regional currency types, depending on where you do business and what currency types you want to see.

There are three ways you set up currency:

- **User Currency** - Set by the business user in Regional settings. This setting applies to the entire application interface for that user only. The available currency options are set by your application administrator.
- **Analytics Currency** - Set by the business user in BI in My Account settings in the Reports area. The setting applies to that user only and is only relevant for analyses.
- **Corporate Currency** - Set by the application administrator. This setting applies to all users in that company.



**Note:** The time zone preferences that you set in your fuse simplified user interface are inherited and used as the time zone setting for your existing and new analytics.

## Set General User Currency

User currency settings determine the currency used as the default for what you see in your application. User currency applies to your entire interface for your signed-in session.

1. Navigate to **Tools, Set Preferences**.
2. Select **General Preferences > Regional**.
3. Select the preferred currency to be used. Available currencies include those set up for your company by your application administrator.

## Set Analytics Currency

The analytics currency settings determine the currency type that's displayed in all your analytics. It also determines how and when your currency conversion rates are calculated.

1. Click **Navigator Tools Reports and Analytics**.
2. Click **Browse Catalog**.
3. Click **My Profile** and select **My Account**.
4. In the Preference tab, select your choice in **Currency**.

This shows the currency display options for users:

Currency Display Type	Description
Entered Currency	Currency used on a transaction.
<Application> Currency	Currency set up in each respective Cloud application as the common Corporate currency used company-wide.
User Preferred Currency using Simple Currency Management	Conversion to User Preferred Currency is performed at the time you run the report, and is calculated from the Corporate currency based on the last time the record was updated and saved or closed.
User Preferred Currency using Advanced Currency Management	Conversion to User Preferred Currency happens on the date you run the report, and uses the currency indicated on the record.

## Set a Default Currency Conversion Option for All Users

By default your currency is converted to the corporate currency with a method called "User Preferred Currency Using Simple Currency Management".

The simple "User Preferred Currency Using Simple Currency Management" setting provides the best run-time performance because when you run a report, the application doesn't have to look up the rate for each transaction. The

currency is converted to your corporate currency at that day's rate when you update and save a record. Otherwise, the application cycles through each record at run-time and converts the currency one record at a time to the exchange rate in effect at the time the report is run. For more information see, *How User Preferred Currency Exchange Works*.

But you can also standardize the setting for all system users, by setting the default preference to another option, such as <myapplication> Currency or User Preferred Currency Using Advanced Currency Management.

To change the default currency setting for all users, administrators need to add a profile option and a corresponding value. Note that when administrators change the default currency setting for users in their organization, individual users can still override that setting and select their preferred currency in **My Account**.

The following table shows the profile option code parameters to override the default currency setting.

Profile Code	Profile Value Description
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	<myapplication>Currency - Defaults to Application Currency.
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	User Preferred Currency 1 - Defaults to User Preferred Currency Simple Currency Management.
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	User Preferred Currency 2 - Defaults to User Preferred Currency Advanced Currency Management.

## Set the Currency for an Individual Analysis

You can set the currency at an analysis level to ensure that the data is displayed in a preferred currency.

Perform the following steps to set the currency for an individual analysis.

1. Open the analysis in Edit mode for which you want to change the currency.
2. Open the Advanced tab.
3. In the Advanced SQL Clauses region, enter one of the following SQL statements in the Prefix field:
  - `SET VARIABLE PREFERRED_CURRENCY='Local Currency';`
  - `SET VARIABLE PREFERRED_CURRENCY='Project Currency';`
  - `SET VARIABLE PREFERRED_CURRENCY='Contract Currency';`
4. Click **Apply SQL**.
5. Click the **Save Analysis** icon.

Alternatively, use the **Save As** icon to save the analysis to a specified location with a new name.

## Set a Global Currency Conversion Profile

Set a global currency conversion method for all your users by creating a currency profile. Only administrators can create currency profiles.

1. In Setup and Maintenance, go to **Manage Administrator Profile Values**.
2. Enter the following values:
  - o **Profile Option Code** : BI\_DEFAULT\_CURRENCY\_CONVERSION\_METHOD
  - o **Profile Display Name** : BI Default Currency Conversion Method
  - o Application
  - o Module
  - o **Start Date** : Provide previous day's date to proceed to next step to define values.
3. Click **Save** and **Close**.
4. In the Manage Profile Options dialog box, you see your new profile. Check the Enabled box for Site.
5. Click **Save** and **Close**.

#### Related Topics

- [How do I update existing setup data?](#)

## Define Currency Profile Values

After you create your currency profile, the last step is to define the profile value. This step defines which currency management option is assigned to that profile.

1. In the Setup and Maintenance work area, use **Manage Administrator Profile Values**.
2. In Profile Option Code search for your profile: BI\_DEFAULT\_CURRENCY\_CONVERSION\_METHOD.
3. In Manage Administrator Profile Values, Click **Add** (+ icon).
4. Select **Site** as the Profile level.
5. Enter "User Preferred Currency 2" in Profile Value.
6. Click **Save and Close**.

## How User Preferred Currency Exchange Works

The simple and advanced user-preferred currency choices determine how and when your currency exchange rates are calculated. For both simple and advanced currency management, when you save or close a report, the exchange rate is set at that time.

The option you choose impacts how quickly your reports are generated at run time. Each case includes trade-offs, as detailed in the examples.

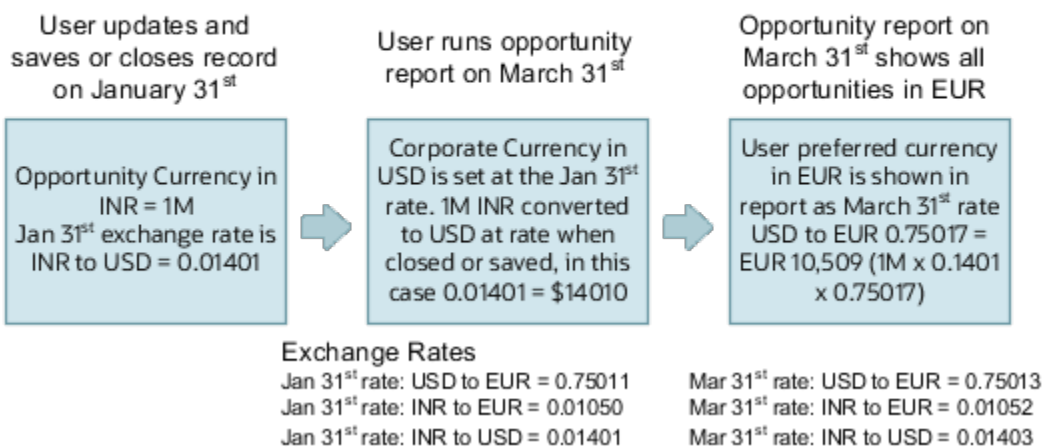
### User Preferred Currency using Simple Currency Management

The advantage of this option is performance - the application doesn't have to look up the rate for each transaction because when you close or save a record, the application converts it to your corporate currency at that day's rate. When you run the opportunity report, the application multiplies that value by your preferred currency exchange rate for the date you run the report. This eliminates the need for the application to cycle through each record, and calculate the corresponding exchange rate to your preferred exchange rate at the time that record was closed or last saved. It simply takes the value on record for the original transaction exchange to corporate currency, and multiplies it by your preferred currency exchange rate at the time you run the report.

As an example of user preferred currency using simple currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st with an exchange rate of 0.01401 Rupees to one US Dollar. The user then runs an opportunity report in US Dollars on March 31st. In the report, the US Dollar Corporate Currency is set at the January 31st rate it was saved at, in this case reporting as \$14,010, or one million multiplied by 0.01401. Finally, an opportunity report on March 31st in Euros uses the March 31st conversion rate for US Dollars to Euros of 0.75017 to convert the recorded US Dollar amount into Euros, in this example one million multiplied by 0.01401, which is the January 31st Rupee to US Dollar exchange rate, multiplied by 0.75013, which is the March 31st rate for Euros. This requires less processing, because the January 31st Rupee to US Dollar exchange rate, while not exact on March 31st, is used as the basis for the calculation of the March 31st opportunity revenue conversion to Euros at the later exchange rate.

The following figure describes an example of user preferred currency using simple currency management.

### Example of User Preferred Currency using Simple Currency Management:



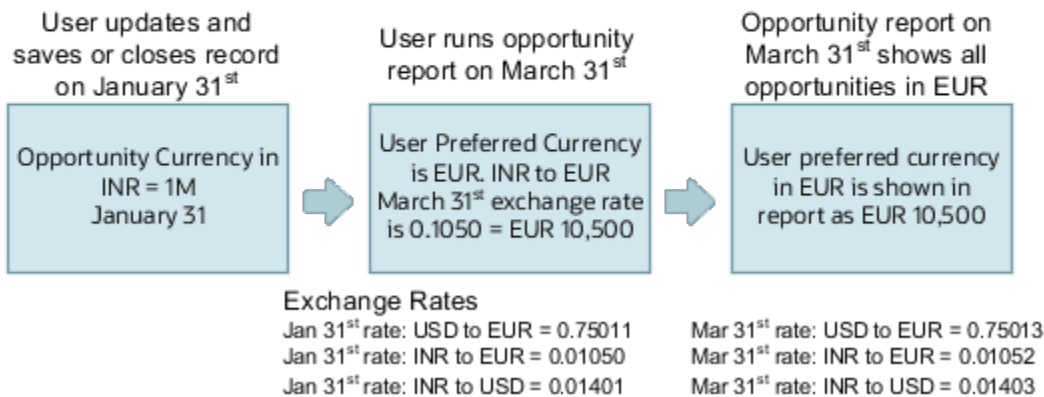
### User Preferred Currency using Advanced Currency Management

This option provides a more precise exchange rate, since it goes through each record to determine the rate on the date the record was updated or closed. The downside of this option is performance. Your reports will take longer to run. The application has to cycle through each record and match currency exchange rates to the date the record was closed or updated and saved.

As an example of user preferred currency using advanced currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st, when an exchange rate of 0.01050 Rupees to one Euro applies. The user then runs an opportunity report on March 31st. In the report, the User Preferred Currency of Euros is applied, using the January 31st Rupee to Euro rate of 0.01050, requiring calculation during report processing to resolve the opportunity to 10,500 Euros. Note that running the opportunity report on March 31st doesn't change the calculation and the close date of January 31st is used.

The following figure describes an example of user preferred currency using advanced currency management.

#### Example of User Preferred Currency using Advanced Currency Management:



## Why do I see amounts of zero in analyses?

Currency exchange rates might not be set up correctly. For example, you set EUR as your preferred currency in general preferences, and corporate currency is USD. Amounts are displayed in EUR after conversion from USD at the current exchange rate.

## Configure Analytics Publisher

### Overview of Report Delivery Servers Management

Oracle Analytics Publisher, the report generation and delivery engine, requires configuration and tuning to deliver reports to users.

Report requests are received by Publisher from:

- Oracle Enterprise Scheduler
- The Reports and Analytics work area and panel tab
- Application pages

Requests submitted through Oracle Enterprise Scheduler are processed by the Oracle Analytics Publisher scheduler. Requests submitted through the Reports and Analytics work area or panel tab can be either real-time online requests or scheduled requests. Requests submitted through an application may call Oracle Enterprise Scheduler or may return report request results directly back to the application page.

Oracle Analytics Publisher is configured to accept requests from Oracle Applications Cloud. However, before you can deliver report documents to their destinations, you must define the delivery servers in Oracle Analytics Publisher. Use the Oracle Analytics Publisher Administration page to define your delivery servers.

Once delivery servers are defined, you can further configure the number of report processor and delivery threads to best handle your processing and delivery requirements. In addition, you can configure report properties for the delivery servers or at the report level to tune performance of your reports. To diagnose report processing issues, Analytics Publisher provides a set of scheduler diagnostics.

## Configure Deep Links

### Register Business Intelligence to Support Deep Linking

Deep linking lets you to navigate from an analysis on the interface pages to specific attributes and objects in your work areas so that you can work with them directly.

What does that mean? It means that if you're looking at an analysis on leads, for example, you can click a record on the analytic and go edit the lead record on the edit object page. To support deep links, use the Setup and Maintenance work area to register the Business Intelligence Server as a third-party application.

### Register Business Intelligence Server as a Third-Party Application

To register the BI Server:

1. Use the **Manage Third Party Applications** page.
2. Click **Create**.
3. Enter **AnalyticsApp** as the application name.
4. Enter the full URL for the BI Server (for example: `http://host:port/analytics/saw.dll`).
5. Enter **Analytics Server** as the Partner Name.
6. Click **Save and Close**.

#### Related Topics

- [Manage Integration of Additional Applications](#)

## Create Deep Links

Create deep links in your analytics that let you navigate from an analysis to specific attributes and objects in your transactional pages to work with them directly.

1. In the Reports and Analytics work area, click **Browse Catalog**.
2. Create or edit an analysis. Use a subject area that includes the attribute you want to link to in the transactional pages, and ensure that you include the object ID.
3. On the Criteria tab, click the **Options** icon for the attribute column on which you need a deep link and select **Column Properties**.
4. Open the Interaction tab in the Column Properties dialog box.
5. In the Primary Interaction list in the Value section, select **Action Links** to display the Action Links table.
6. Select the **Do not display in a pop-up if only one action link is available at runtime** option.

7. Click **Add Action Link**.
8. In the New Action Link dialog box, enter the link text for the navigation.
9. Click the **Create New Action** icon and select **Navigate to a Web Page**.
10. In the Create New Action dialog box, enter the URL to navigate to, which references parameters you define in the prompt. For shared analyses: **//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=~/shared/Custom/<folder>/@{6}**

**Note:** If you don't click the Return icon, remove parameters 5 through 7. In this case, the URL would be: **//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2};searchInd=@{3}&action=@{4}**

For personal analyses stored in My Folders: **//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=~/users/@{5}/@{6}**

11. Click **Define Parameters** to add corresponding parameters for the URL.
12. In the Define Parameters section, click **Add Parameter** to add the following mandatory parameters:

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes
1	Object Type	Value	<Object Type>	Selected	Selected	Used for shared and personal analyses.
2	<Prompt Name>	Column Value	Column Name in "<table.name>" format	Selected	Selected	Used for shared and personal analyses.
3	Action	Value	edit	Selected	Selected	Used for shared and personal analyses.
4	returnApp	Value	AnalyticsApp	Selected	Selected	Used for shared and personal analyses.
5	Logged in User	Session Variable	USER	Selected	Selected	Session variable parameter used for personal analysis permissions.
6	Report Name	Value	Analysis Name	Selected	Selected	Used for shared and personal analyses. The name of the

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes
						analysis to return to after working in the transactional page.

13. Click **Options** to set how the page opens.
14. In the Action Options dialog box, select **Open in New Window** to open the page in a new window.
15. Save your work.
16. If you have provided the Return Application name, a Return icon is available in the transactional page to return to the analysis.

*Related Topics*

- [Register Business Intelligence to Support Deep Linking](#)
- [Manage Analytics with Advanced Features](#)

## Deep Links for Project Management

Project managers use Oracle Transactional Business Intelligence (OTBI) to gain real-time insights into their projects. You can enable a column in an analysis as a deep link to drill down to a transaction page.

Here's the syntax to create an action link in OTBI to create a deep link.

```
https://hostname/fscmUI/faces/deepLink?objType=@{1}&objKey=ObjectId=@{2}&action={3}&returnApp=@{4}&returnAppParams=PortalGo%26path=/users/@{5}/@{6}
```

Use this syntax if you don't want to use the return feature.

```
https://hostname/fscmUI/faces/deepLink?objType=@{1}&objKey=ObjectId=@{2}&action={3}
```

Parameter	Details
{1}	Name of the object type.
{2}	Name of the object key.
{3}	The action on clicking the link. The name of the page or work area where you want to navigate from the analysis.
{4}	Name of your analytics application.
{5}	Logged in user.
{6}	Name of the analysis.



For example, to navigate to the Project Overview page in context of a project from your analysis, the action link is as follows:

```
https://hostname/fscmUI/faces/deeplink?objType=@{Project}&objKey=ObjectId=@{"Project"."Project Key"}&action={OVERVIEW}&returnApp=@{AnalyticsApp}&returnAppParams=PortalGo%26path=/users/{USER}/{Project Drill Down}
```

Here's the list of pages you can access using deep links. Use the relevant object type, object key, and action values in the syntax to navigate to the corresponding page in the application.

Object Type	Object Key	Object Id	Action	Navigates to Application Page
PROJECT	"Project"."Project Key"	objKey=ProjectId=@{2}	NONE	The default page, that's the Project Overview page
PROJECT	"Project"."Project Key"	objKey=ProjectId=@{2}	OVERVIEW	Project Overview
PROJECT	"Project"."Project Key"	objKey=ProjectId=@{2}	MANAGE_FIN_PLAN	Manage Financial Project Plan
PROJECT	"Project"."Project Key"	objKey=ProjectId=@{2}	MANAGE_BUDGET	Manage Project Budget
PROJECT	"Project"."Project Key"	objKey=ProjectId=@{2}	TRACK_PROGRESS	Track Financial Project Progress
PROJECT	"Project"."Project Key"	objKey=ProjectId=@{2}	MANAGE_FORECAST	Manage Project Forecast
PROJECT_ACTION_ITEM	"Task"."Task Key"	objKey=projElementId=@{2}	EDIT	Edit Action Item
PROJECT_BUDGET	"Project"."Project Key"	objKey=ProjectId=@{2}	NONE	NManage Project Budget
PROJECT_BUDGET	"Project"."Project Key"; "Param1"."Budget version Key"	objKey=ProjectId=@{2}	VIEW	View Project Budget
PROJECT_DELIVERABLE	"Deliverable Details"."deliverableId"	objKey=deliverableId=@{2}	EDIT	Edit Deliverable
PROJECT_FORECAST	"Project"."Project Key"	objKey=ProjectId=@{2}	NONE	Manage Project Forecast
PROJECT_FORECAST	"Project"."Project Key"; "Param1"."Forecast version Key"	objKey=ProjectId=@{2}	VIEW	View Project Forecast
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=ProjectId=@{2}	MANAGE_FINANCIAL_PROJECT	Manage Financial Project
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=ProjectId=@{2}	MANAGE_PROJECT_BUDGET	Manage Project Budget

Object Type	Object Key	Object Id	Action	Navigates to Application Page
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	MANAGE_PROJECT_CALENDAR	Manage Project Calendar
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	MANAGE_PROJECT_FORECAST	Manage Project Forecast
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	NONE	NManage Project Plan
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	MANAGE_PROJECT_RESOURCE_REQUESTS	NManage Project Resource Requests
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	MANAGE_PROJECT_RESOURCES	Manage Project Resources
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	MANAGE_TASK_EXCEPTIONS	NManage Task Exceptions
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	MANAGE_WORK_ITEMS	Manage Work Items
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	TRACK_FINANCIAL_PROJECT_PROGRESS	Track Financial Project Progress
PROJECT_MANAGEMENT	"ChangeOrder"."ChangeOrder Key"	objKey=changeDocId=@{2}	MANAGE_CHANGE_ORDERS	Manage Change Orders
PROJECT_MANAGEMENT	"Project"."Project Key"	objKey=projectId=@{2}	VIEW_ONLY_PLAN	View Project
PROJECT_MANAGEMENT	"Issue Details"."Issue Id"	objKey=issueId=@{2}	EDIT	Edit Issue
PROJECT_RESOURCE	"Resource"."Resource Key"	objKey=resourceId=@{2}	EDIT	Resource Details
PROJECT_RESOURCE_ASSIGNMENT	"Project Assignment"."Assignment Number"	objKey=assignmentId=@{2}	EDIT	Edit Project Resource Assignment
PROJECT_RESOURCE_REQUEST	"Project Request Details"."Request Number"	objKey=requestId=@{2}	EDIT	Edit Project Resource Request
PROJECT_MILESTONE_TASK	"Task"."Task Key"	objKey=projElementId=@{2}	EDIT	Edit Milestone
PROJECT_TASK	"Task"."Task Key"	objKey=projElementId=@{2}	EDIT	Edit Project Task
PROJECT_TO_DO_TASK	"Task"."Task Key"	objKey=projElementId=@{2}	EDIT	Edit To-do Task

Object Type	Object Key	Object Id	Action	Navigates to Application Page
UNPROCESSEDTXNDETAILS	"Unprocessed Transaction Details"."Transaction Interface Id"	none	Drill	Manage Unprocessed Project Costs
EXPENDITUREITEMDETAILS	"Expenditure.item"."expendi	objKey=ExpltemId=@{2}	EDIT	Manage Project Costs page
PROJECT_INVOICES	"Invoice details"."Invoice ID"	objKey=InvoiceId=@{2}	EDIT	Manage Invoices page
INV_BILLING_EVENTS	"Event details"."Event key"	objKey=eventId=@{2}	EDIT	Manage Events page

## Grants Management

You can enable an Action link on a column in your analysis, such as Award Number, to enable the drill down to the Award Overview page. Here's the syntax to create an action link in Grants Management.

```
https://hostname/fscmUI/faces/deeplink?
objType=@{1}&objKey=ObjectId=@{2};searchInd=@{3}&action={4}&returnApp=@{5}&returnAppParams=PortalGo%26path=
users/{6}/{7}
```

Use the following syntax if you don't want to use the return feature.

```
https://hostname/fscmUI/faces/deeplink?objType=@{1}&objKey=paraAwardId=@{2};searchInd=@{3}&action=@{4}
```

Parameter	Prompt	Type	Value	Details
{1}	ObjType	Value	Awardoverview	Name of the object type.
{2}	ObjKey	Column Value	"Award"."Award ID"	Name of the object key.
{3}	SearchInd	Value	0	Search index value.
{4}	Action	Value	EDIT	The action on clicking the link. The name of the page or work area where you want to navigate from the analysis.
{5}	returnApp	Value	AnalyticsApp	Name of your analytics application.
{6}	Logged in User	Session Variable	USER	Logged in user.
{7}	Report Name	Value	Award Drill Down*	Name of the analysis.

\*Change parameter 7 and put the name of the report you created.

Ensure that the data format for Award ID has no decimal places.

When you create a deep link, include these steps:

1. Replace the "hostname" with the name of the environment.
2. If you don't click the return icon, remove lines 5 through 7. The URL should be:  
`https://hostname/fscmUI/faces/deepLink?objType=@{1}&objKey=paraAwardId=@{2};searchInd=@{3}&action=@{4}`
3. Enable the option Do not display in a popup if only one action link is available at runtime.

## FAQs for Deep Links

### Why did a deep link open to a blank page?

You may not have access to the linked object, or the URL entered for the action is incorrect, for example lacking the environment or the Object ID name.

- Check the URL you entered for the action. It may be missing the environment name or the Object ID name.
- Check the URL parameters, the spelling of the action, and that you're using the correct key in the object's analysis.

### Do I have to display the ID for my object?

No, you can add it, format the column as a number with zero decimals, and then hide the column.

### Can I display actions for some users and not others?

Yes, you define conditions for the action to display.

## Manage Permissions

### Manage Catalog Permission

You may want to remove access to predefined catalog folders so that those associated with offerings you don't use aren't displayed. You can hide the entire predefined catalog or selectively display root catalog folders for offerings.

To control which offerings are available, create a custom role based on the Custom BI Web cat Reporting Duty role and its associated roles for each. Using custom roles, you can manage folder access in a number of ways, depending on requirements and previous modifications you have made.

- Add duty roles for parent folders to the custom role so that all users see a subset of the predefined catalog. Add roles only for the offerings you want to retain access for.
- Don't add any catalog reporting duty roles for any offerings to the custom role to hide the entire predefined catalog and display only **/Shared/Custom** folders. For example, you can remove BI catalog access for external users such as partners who have no access to reporting.
- Delete all catalog reporting duty roles from the custom role. Also, add catalog reporting duty roles to a new or existing job role so that job roles with BI access get default access to the predefined catalog. For example, by

default, Financial job roles have access to Financial reporting content but Human Capital Management job roles don't have access to the predefined HCM BI catalog. You can grant the Human Capital Management Folder Reporting Duty role to new job roles to allow access to predefined HCM reports.

## Hide Predefined Catalog Folders

All authenticated users have the Custom BI Web cat Reporting Duty role, which inherits all of the folder reporting roles that determine access and visibility of root level catalog folders. Administrators with IT Security Manager privileges can hide predefined folders by creating custom roles based on this role and their associated roles from the duty role.

1. Open the Security Console.
2. Search for Custom BI Web cat Reporting Duty and review its duty roles to determine which to retain in your custom role.
3. Create a custom role.
4. Click **Actions > Add Role**.
5. Click **Next** twice to navigate to the Role Hierarchy step.
6. To hide all folders, leave the hierarchy empty. Add any roles for offerings you want to retain access for.
7. Run the **Import User and Role Application Security Data** process to synchronize security changes.
8. Click **Browse Catalog** in the Reports and Analytics work area and click **Administration**. In the Maintenance and Troubleshooting section, select **Reload Files and Metadata** to refresh the BI cache.

## BI Reporting Roles

This table shows the mapping between shared root catalog folders, folder reporting roles, and job roles.

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
/Shared/Common Content	BI_COMMON_CONTENT_REPORTING_DUTY	Common Content Folder Reporting Duty	None
/Shared/Customer Data Management	BI_CDM_REPORTING_DUTY	Customer Data Management Folder Reporting Duty	None
/Shared/Enterprise Contracts	BI_OKC_REPORTING_DUTY	Enterprise Contracts Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB, ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT
/Shared/Extension	BI_EXT_REPORTING_DUTY	Extension Folder Reporting Duty	None

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Financials</b>	BI_FIN_REPORTING_DUTY	Financials Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_INVOICE_SUPERVISOR_JOB, ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_PAYMENT_SUPERVISOR_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_SOD_JOB, ORA_AR_BILLING_MANAGER_JOB, ORA_AR_BILLING_SPECIALIST_JOB, ORA_CE_CASH_MANAGER_JOB, ORA_EXM_EXPENSE_MANAGER_JOB, ORA_FA_ASSET_ACCOUNTANT_JOB, ORA_FA_ASSET_ACCOUNTING_MANAGER_JOB, ORA_FUN_INTERCOMPANY_ACCOUNTANT_JOB, ORA_GL_FINANCIAL_ANALYST_JOB, ORA_VRM_REVENUE_ANALYST_JOB, ORA_VRM_REVENUE_MANAGER_JOB, ORA_XCC_BUDGET_MANAGER_JOB
<b>/Shared/Higher Education</b>	BI_HED_REPORTING_DUTY	Higher Education Folder Reporting Duty	ORA_HEQ_ADMISSIONS_COORDINATOR_JOB, ORA_HEQ_ADMISSIONS_MANAGER_JOB, ORA_HER_ACADEMIC_COORDINATOR_JOB, ORA_HER_REGISTRAR_JOB, ORA_HES_BURSAR_JOB, ORA_HEY_STUDENT_SERVICES_MANAGER_JOB, ORA_HEY_STUDENT_SUPPORT_ADVISOR_JOB
<b>/Shared/Human Capital Management</b>	BI_HCM_REPORTING_DUTY	Human Capital Management Folder Reporting Duty	By default, predefined HCM job roles have no access to the predefined content.
<b>/Shared/Incentive Compensation</b>	BI_IC_REPORTING_DUTY	Incentive Compensation Folder Reporting Duty	ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB, ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_MANAGER_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
/Shared/Loyalty	BI_LOY_REPORTING_DUTY	Loyalty Folder Reporting Duty	ORA_LOY_LOYALTY_MARKETING_MANAGER_JOB, ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB
/Shared/Manufacturing	BI_MFG_REPORTING_DUTY	Manufacturing Folder Reporting Duty	ORA_CSE_ASSET_ADMINISTRATOR_JOB
/Shared/Marketing	BI_MKT_REPORTING_DUTY	Marketing Folder Reporting Duty	ORA_MKL_SALES_LEAD_QUALIFIER_JOB, ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_ANALYST_JOB, ORA_MKT_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB, ORA_MKT_MARKETING_VP_JOB
/Shared/Partner	BI_ZPM_REPORTING_DUTY	Partner Folder Reporting Duty	ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB
/Shared/Procurement	BI_PRC_REPORTING_DUTY	Procurement Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_PO_BUYER_JOB, ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB, ORA_PO_PROCUREMENT_INTEGRATION_SPECIALIST_JOB, ORA_PO_PURCHASE_ANALYSIS_ABSTRACT, ORA_POQ_SUPPLIER_QUALIFICATION_DISCRETIONARY, ORA_POR_PROCUREMENT_REQUESTER_ABSTRACT, ORA_POZ_SUPPLIER_ADMINISTRATOR_ABSTRACT, ORA_POZ_SUPPLIER_MANAGER_ABSTRACT
/Shared/Projects	BI_PRJ_REPORTING_DUTY	Projects Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_PJF_GRANTS_ACCOUNTANT_JOB, ORA_PJF_GRANTS_ADMINISTRATOR_JOB, ORA_PJF_GRANTS_DEPARTMENT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_ACCOUNTANT_JOB, ORA_PJF_PROJECT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_BILLING_SPECIALIST_JOB, ORA_PJF_PROJECT_EXECUTION_ABSTRACT, ORA_PJF_PROJECT_EXECUTIVE_JOB, ORA_PJF_PROJECT_INTEGRATION_SPECIALIST_JOB, ORA_PJF_PROJECT_MANAGEMENT_DUTY_ABSTRACT, ORA_PJF_PROJECT_MANAGER_JOB, ORA_PJF_PROJECT_TEAM_MEMBER_ABSTRACT, ORA_PJF_PROJECTS_APPLICATION_ADMINISTRATOR_JOB, ORA_PJF_RESOURCE_MANAGER_JOB, ORA_PJF_TEAM_COLLABORATOR_ABSTRACT
<b>/Shared/Public Sector</b>	BI_PSC_REPORTING_DUTY	Public Sector Folder Reporting Duty	ORA_PSC_AGENCY_STAFF_ABSTRACT, ORA_PSC_BUILDING_INSPECTOR_JOB, ORA_PSC_BUSINESS_ANALYST_JOB, ORA_PSC_CHIEF_BUILDING_OFFICER_JOB, ORA_PSC_ECONOMIC_DEV_OFFICER_JOB, ORA_PSC_FINANCE_ADMIN_JOB, ORA_PSC_INSPECTIONS_SUPERVISOR_JOB, ORA_PSC_PERMIT_TECHNICIAN_JOB, ORA_PSC_PERMITS_APPLICATION_ADMINISTRATOR_JOB, ORA_PSC_PERMITS_SUPERVISOR_JOB, ORA_PSC_PLAN_COORDINATOR_JOB, ORA_PSC_PLAN_REVIEWER_JOB, ORA_PSC_PRINCIPAL_PLANNER_JOB, ORA_PSC_SYSTEM_ADMINISTRATOR_JOB
<b>/Shared/Risk Management</b>	BI_GRC_REPORTING_DUTY	Risk Management Folder Reporting Duty	ORA_GTG_APPLICATION_ACCESS_AUDITOR_JOB, ORA_GTG_APPLICATION_CONTROL_MANAGER_JOB, ORA_GTG_COMPLIANCE_MANAGER_JOB, ORA_GTG_ENTERPRISE_RISK_AND_CONTROL_MANAGER_JOB, ORA_GTG_RISK_MANAGEMENT_AUDITOR_JOB, ORA_GTR_



Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			USER_ACCESS_CERTIFICATION_MANAGER_JOB
<b>/Shared/Sales</b>	BI_ZBS_REPORTING_DUTY	Sales Folder Reporting Duty	ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZBS_SALES_MANAGER_JOB, ORA_ZBS_SALES_REPRESENTATIVE_JOB, ORA_ZBS_SALES_RESTRICTED_USER_JOB, ORA_ZBS_SALES_VP_JOB, ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB, ORA_ZSP_SALES_ANALYST_JOB
<b>/Shared/Service</b>	BI_SVC_REPORTING_DUTY	Service Folder Reporting Duty	ORA_CSO_KNOWLEDGE_ANALYST_JOB, ORA_CSO_KNOWLEDGE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB, ORA_SVC_INTERNAL_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_INTERNAL_HELP_DESK_AGENT_JOB, ORA_SVC_INTERNAL_HELP_DESK_MANAGER_JOB, ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
<b>/Shared/Subscription Management</b>	BI_OSS_REPORTING_DUTY	Subscription Management Folder Reporting Duty	ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB
<b>/Shared/Supply Chain Management</b>	BI_SCM_REPORTING_DUTY	Supply Chain Management Folder Reporting Duty	ORA_ACD_PRODUCT_DESIGN_ENGINEER_JOB, ORA_ACD_PRODUCT_DESIGN_MANAGER_JOB, ORA_ACE_PRODUCT_MANAGEMENT_VP_JOB, ORA_ACE_PRODUCT_PORTFOLIO_MANAGER_JOB, ORA_CMF_FISCAL_DOCUMENT_SPECIALIST_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			JOB, ORA_CMF_RECEIVING_SPECIALIST_JOB, ORA_CMR_RECEIPT_ACCOUNTING_DISCRETIONARY, ORA_CSE_ASSET_ADMINISTRATOR_JOB, ORA_CST_COST_ACCOUNTANT_JOB, ORA_DOO_ORDER_ADMINISTRATOR_JOB, ORA_DOO_ORDER_MANAGER_JOB, ORA_EGI_PRODUCT_DATA_STEWARD_JOB, ORA_EGP_PRODUCT_MANAGER_JOB, ORA_ENQ_QUALITY_ANALYST_JOB, ORA_ENQ_QUALITY_ENGINEER_JOB, ORA_FOS_SUPPLY_CHAIN_CONTROLLER_JOB, ORA_INV_INVENTORY_MANAGER_JOB, ORA_INV_WAREHOUSE_MANAGER_JOB, ORA_MNT_MAINTENANCE_MANAGER_JOB, ORA_MNT_MAINTENANCE_TECHNICIAN_JOB, ORA_MSC_BACKLOG_MANAGER_JOB, ORA_MSC_DEMAND_AND_SUPPLY_PLANNER_JOB, ORA_MSC_DEMAND_PLANNER_JOB, ORA_MSC_MATERIALS_PLANNER_JOB, ORA_MSC_REPLENISHMENT_PLANNER_JOB, ORA_MSC_SALES_AND_OPERATIONS_PLANNER_JOB, ORA_MSC_SUPPLY_CHAIN_PLANNER_JOB, ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB, ORA_VCS_SUPPLY_CHAIN_COLLABORATION_PLANNER_JOB, ORA_WSH_SHIPPING_MANAGER_JOB
<b>/Shared/Functional Setup</b>	BI_FSM_REPORTING_DUTY	Functional Setups Folder Reporting Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB
<b>/Shared/Security</b>	FBI_SECURITY_TRANSACTION_ANALYSIS_DUTY	Security Transaction Analysis Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_FND_IT_SECURITY_MANAGER_JOB

## Predefined Catalog Lockdown

If you try to modify the predefined catalog content including folder permissions, you get an alert indicating that you're not allowed to modify content and asking that you save your own content in the **/Shared/Custom** folder.

Here are a few things to know about catalog folders:

- You must save all modified content in the **/Shared/Custom** folder or in new folders in the **/Shared** folder.
- Existing modified content in the **/Shared/Custom** folder or custom folders in the **/Shared** folder and their subfolders is preserved. If you have modified the content in the predefined catalog folders, all changes are lost

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during any upgrade. To preserve content, archive your catalog content and unarchive it in the **Shared/Custom** folder after upgrade.

- All existing content in parent folders in the **/Shared** folder is preserved.
- You can't change folder or object permissions on the predefined catalog folders or content. For example, you can't change folder permissions to hide folders or objects.

#### *Related Topics*

- [Role Inheritance](#)
- [Archive and Move Analytics](#)
- [Submit Scheduled Processes and Process Sets](#)



# 3 Subject Areas and Predefined Analyses

## Overview of Subject Areas and Predefined Analyses

The BI repository defines the columns that are available for you to include in analyses and where data for each column comes from.

The repository is organized into subject areas which contain folders with columns. Each subject area has one fact folder and a number of dimension folders. The dimension folders contain attribute and hierarchical columns and are joined to the fact folder within a subject area. For example, if your analysis has Currency attribute from a dimension folder, you see a currency column in the results. If you also add the Total fact, then your analysis includes only those records that have both currency and total amount columns populated.

This chapter provides detailed information about:

- The subject areas that can be used to create real-time analyses and dashboards
- Dimensions that you can use for analyses
- Pre-defined analytics
- Dashboards

## Data Structure for Analytics

The BI repository defines which columns (or slices of data) are available for you to include in analyses, and where data for each column comes from.

The repository is organized into subject areas which contain folders with columns. You can also use the BI repository as a data source for reports.

## Columns

The following table describes the three types of columns.

Column Type	Description	Example
Fact	Provides a measure of values that are numbers.	Credit Amount in Contract Currency
Attribute	Represents information about a business object with values that are dates, IDs, or text.  Attribute columns can be flexfield segments imported into the BI repository.	Contract Association Level
Hierarchy	Holds data values that are organized in a hierarchical manner.	Date - Week To Year hierarchy contains: <ul style="list-style-type: none"><li>• Total</li></ul>

Column Type	Description	Example
		<ul style="list-style-type: none"><li>• Week To Year</li><li>• Week</li><li>• Day Detail</li></ul>

## Subject Areas

To create an analysis:

1. Select a subject area which contains columns related to a specific business object or business area. For example, **Project Billing - Invoices Real Time**.
2. Open folders within the subject area to find the columns to include in your analysis. For example, you can open the **Project** folder and select the **Project Ledger Currency** column within it.

## Folders

Each subject area has one fact folder and a number of dimension folders. Folders can have subfolders. For example, the **Project** folder in **Project Billing - Invoices Real Time** subject area has multiple subfolders like **Project Classification**, **Project Data Attributes**, **Project Record Information**, and so on.

- Fact folders:
  - Contain fact columns.
  - Are usually at the bottom of the list of folders and are usually named after the subject area.
- Dimension folders:
  - Contain attribute and hierarchical columns.
  - Are joined to the fact folder within a subject area.

For example, if your analysis has Currency attribute from a dimension folder, you see a currency column in the results. If you also add the Total fact, then your analysis includes only those records that have both currency and total amount columns populated. Adding certain columns can reduce the query set for your analysis depending on how you joined them in the query.

**Note:** If you add attributes that don't have a value, you see them as null in the results if you joined them appropriately in the query.

- Can be common folders or contain common dimensions that appear in more than one subject area. If your analysis has columns from multiple subject areas then you must include:
  - Columns from dimension folders that are common to all those subject areas. At least one such column is mandatory.
  - One column from the fact folder in each of those subject areas.

# Subject Areas for Project Management Real-Time Analyses

You can use multiple subject areas to create real-time analyses and dashboards for Oracle Fusion Cloud Project Management as listed below.

Subject Area	Description	Business Questions
Projects - Period Close Exceptions	Analyze project period close exceptions associated to unprocessed costs, expenditures, and revenue. View pending transactions by using dimensions such as project, task, expenditure type, project organization, and message type.	<ul style="list-style-type: none"> <li>Which transactions prevent project period closure?</li> <li>What is the amount of pending transactions?</li> <li>Which projects have pending transactions?</li> </ul>
Projects - Billing and Revenue Exceptions Real Time	Analyze project billing and revenue exceptions raised during the revenue and invoice generation processes and the integration of project invoices with Oracle Fusion Receivables. View details for the exceptions by using dimensions such as business unit, contract, project, and message type.	<ul style="list-style-type: none"> <li>Which projects have missing labor rate exceptions for revenue or invoicing?</li> <li>Which invoices were rejected during the transfer to Oracle Fusion Receivables?</li> <li>Which events could not be invoiced due to funding limit issues?</li> <li>What are all of the billing and revenue exceptions for a business unit?</li> </ul>
Project Billing - Bill Transactions Real Time	Analyze real-time information on project contract bill transactions. View expected revenue and invoice amounts in different currencies for unbilled transactions (work in progress) by dimensions such as customer, contract, project, billing person, unit of measure and unit price.	<ul style="list-style-type: none"> <li>Which contracts, contract lines and bill plans do unbilled transactions relate to?</li> <li>Which transactions are unbilled and what is the expected bill amount?</li> </ul>
Project Billing - Event Real Time	Analyze real-time information of project contract billing events. View project contract billing events at an individual transaction level and analyze billing events using dimensions such as contract, contract line, project, and task. You can also analyze billing events by event details such as event type, completion date, invoice revenue and status, and reversal indicator.	<ul style="list-style-type: none"> <li>Which are the billing events for a project or contract and contract line?</li> <li>What's the total amount or number of completed billing events which aren't invoiced or recognized for revenue for a contract and contract line?</li> <li>Which billing events are on an invoice hold or a revenue hold?</li> <li>Which billing events are potentially missing an event completion date?</li> </ul>
Project Billing - Funding Real Time	Gain insight into project contract funding information to analyze funds consumed for invoice and revenue, and funds remaining by using dimensions such as customer, organization, contract, billing type, project, task, and time.	<ul style="list-style-type: none"> <li>Which are the contract lines for a contract?</li> <li>How much of the contract line amount is invoiced and recognized for revenue?</li> <li>Which projects are linked to contracts?</li> </ul>

Subject Area	Description	Business Questions
		<ul style="list-style-type: none"> <li>Which project contracts are active for a business unit?</li> </ul>
Project Billing - Invoices Real Time	Gain insight into real-time project contract invoice information at an individual transaction level and analyze invoicing, concessions, and credits by using dimensions such as customer, organization, contract, billing type, project, task, employee, time, and currency.	<ul style="list-style-type: none"> <li>What are the transactions for an invoice line?</li> <li>Which invoices need attention?</li> <li>What are the invoice line details for a particular invoice?</li> <li>Who are the contracted customers for a business unit?</li> </ul>
Project Billing - Revenue Real Time	Analyze real-time information on revenue recognized for project contracts. View project contract revenue information at an individual transaction level by using dimensions such as customer, organization, contract, billing type, project, task, employee, time, and currency.	<ul style="list-style-type: none"> <li>Which contracts have actual revenue in the current accounting year?</li> <li>Which contracts have the lowest actual revenue in the current accounting period?</li> <li>What's the actual revenue trend for accounting periods in the selected accounting year?</li> </ul>
Project Control - Budgets Real Time	Analyze project budget data such as raw and burdened cost, planned effort, revenue, and margin for current working, submitted, current baseline, and original baseline budget versions. View real-time project budget information by using dimensions such as project, task, employee, time, and planning resource.	<ul style="list-style-type: none"> <li>Which projects are under a business unit and what are the statuses of these projects?</li> <li>What's the budgeted amount for a project for the various budget versions?</li> <li>What's the planned effort and revenue amount for a project for the various budget versions?</li> </ul>
Project Control - Forecasts Real Time	Analyze project forecast data for current, submitted, prior, and original forecast versions. View real-time forecast data such as raw and burdened cost, planned effort, revenue, margin, and variance measures such as cost variance, revenue variance, and so on by using dimensions such as project, task, employee, time, and planning resource.	<ul style="list-style-type: none"> <li>What are the raw and burdened costs for a project?</li> <li>What's my cost variance?</li> <li>What's my margin on a project?</li> <li>What's the forecasted revenue for a project?</li> <li>What are the different forecast versions for my project?</li> </ul>
Project Control - Financial Project Plans Real Time	Analyze real-time information on financial project plans such as planned raw and burdened cost, planned effort, actual raw and burdened cost, and actual effort for current working and current baseline financial project plans. View high-level planning for your project tasks by using dimensions such as project, task, time, and planning resources.	<ul style="list-style-type: none"> <li>Which planned resources are working on my tasks?</li> <li>What are my project tasks?</li> <li>What are the planned periodic amounts for my resource assignments?</li> <li>Which are my unplanned resources on the project plan?</li> <li>What are my project tasks without any task assignments?</li> </ul>
Project Control - Progress Real Time	Analyze project progress and view specific progress details such as actual cost, estimated effort to complete, cost percent spent, physical percent complete, and estimated cost at	<ul style="list-style-type: none"> <li>What's the latest published physical percent complete for all tasks?</li> </ul>



Subject Area	Description	Business Questions
	completion. Measure project performance using earned value metrics, including cost variance, cost performance index, and schedule performance index. Analyze performance trends as progress is captured over time and use that information to estimate and control project outcomes.	<ul style="list-style-type: none"> <li>What's the latest published physical percent complete for summary tasks?</li> <li>What are the planned and actual costs for each task as per the latest published progress?</li> <li>What are the cost and schedule performance indexes on my project?</li> </ul>
Project Costing - Actual Costs Real Time	Analyze actual project costs by viewing supplier, labor, nonlabor, and third-party transaction project costs. View specific costs, associated expenditure items, and distribution line details for a specific project, task, task hierarchy, employee, project organization, and expenditure organization for a specific time period.	<ul style="list-style-type: none"> <li>Which capitalizable costs aren't yet capitalized?</li> <li>How much does each transaction source contribute to project costs?</li> <li>Which transactions contribute to the total cost of my projects?</li> </ul>
Project Costing - Assets Real Time	Analyze capital projects and identify possible exceptions by comparing expensed and capitalizable costs. Track capitalizable costs throughout the capitalization process and review asset details, view asset assignments to projects and tasks, analyze amounts charged to different accounts, and drill down to cost distribution lines.	<ul style="list-style-type: none"> <li>What's the total capitalized cost of my assets?</li> <li>How's an expenditure item allocated across assets?</li> <li>Which cost distributions are included in an asset line?</li> <li>Which assets are assigned to a task?</li> </ul>
Project Costing - Commitments Real Time	Gain insight into project commitment transactions from the procure-to-pay flow. View requisition, purchase order, and supplier invoice measures for a project, task, task hierarchy, project organization, and expenditure organization for a specific time period.	<ul style="list-style-type: none"> <li>What are the requisitions and purchase orders that still have commitment costs for my project?</li> <li>What are the outstanding commitments for my project?</li> <li>Which commitments are associated with my capital projects?</li> </ul>
Project Costing - Expenditure Item Performance - Real Time	Analyze expenditure item performance by gaining insight into project expenditure item costs, and billing and revenue details. View expenditure item type and class information for project, task, task hierarchy, employee, project organization, and expenditure organization for a specific time period.	<ul style="list-style-type: none"> <li>What are the billing and revenue details by project?</li> <li>What was the expenditure incurred on a project in a prior week?</li> <li>Which expenditure items are associated with my capital projects?</li> </ul>
Project Costing - Unprocessed Transactions Real Time	Analyze unprocessed project transactions sourced from Oracle Fusion Cloud Applications or third-party applications and view general details about pending, failed, and unprocessed transactions including the original source and processing information. View unprocessed transactions for a project, task, task hierarchy, employee, related expenditure types, project organization, and expenditure organization for a specific time period.	<ul style="list-style-type: none"> <li>What unprocessed transactions are waiting to be sent to Oracle Fusion Cloud Project Management?</li> <li>Which transactions weren't successfully imported to Oracle Fusion Cloud Project Management?</li> </ul>
Projects - Labor Distribution Cost Analysis Real Time	Analyze real-time information on labor distributions using dimensions like project,	<ul style="list-style-type: none"> <li>What payroll batches have loaded recently and where did they distribute too?</li> </ul>

Subject Area	Description	Business Questions
	task, award, employee, project organization, and general ledger charging instructions for a specific time period.	<ul style="list-style-type: none"> <li>• What errors / exceptions exist and what types?</li> <li>• How many costs are being distribute to GL vs Projects over time?</li> </ul>
Projects - Labor Schedule Analysis Real Time	Analyze real-time information on labor schedules using dimensions like project, task, award, employee, project organization, and general ledger charging instructions for a specific time period.	<ul style="list-style-type: none"> <li>• Who has a labor schedule with no costs associated?</li> <li>• Labor schedules ending in next 3 months?</li> <li>• What labor schedules are likely to fail in the near future? Labor schedules with Awards / Projects Ending Soon.</li> <li>• Award / Projects with the most labor Schedules Active?</li> </ul>
Project Management - Baseline Versions Real Time	Analyze the multiple baseline versions information for the projects that you manage using dimensions such as project, task, task hierarchy, and baseline version details. View the real-time information through baseline version metrics such as baseline variance with current dates, effort, and costs.	<ul style="list-style-type: none"> <li>• What's the baseline history information for my projects?</li> <li>• What's the schedule, effort, and cost variance across multiple baselines for my tasks or projects?</li> </ul>
Project Management - Change Management Real Time	Analyze real-time project change order information using dimensions such as change order reason, status, impact, participant, time, and project.	<ul style="list-style-type: none"> <li>• What's the number of pending change orders grouped by various stages?</li> <li>• What are the reasons for change orders?</li> <li>• What's the estimated cost and revenue for the change order?</li> <li>• What's the current stage and status of the change order?</li> </ul>
Project Management - Opportunity Integration Real Time	Analyze specific project opportunity details such as status, win probability percentage, deal amounts, and weighted labor bill and cost amounts. View real-time information through opportunity-related project metrics using dimensions such as opportunity, project, and time.	<ul style="list-style-type: none"> <li>• How many projects are in the pipeline for each customer?</li> <li>• What's the weighted (adjusted) revenue for all projects under this branch of the enterprise project structure?</li> <li>• Which are the projects for this opportunity?</li> <li>• How much did it cost to pursue this deal?</li> <li>• What are the win probabilities for opportunities on a project?</li> <li>• What are the deal and weight labor bill amounts on a project?</li> </ul>
Project Management - Planning Real Time	Analyze project plan data and view specific project plan details such as start and finish dates, progress information, planned, actual, and remaining cost, and labor effort. View real-time information through project plan metrics using dimensions such as project, task, employee, progress status, resource, sprint, and time.	<ul style="list-style-type: none"> <li>• What are the planned billing amounts for my projects?</li> <li>• What are the operating margins for my projects?</li> <li>• What are the planned and actual margins and margin percentages for my projects?</li> </ul>

Subject Area	Description	Business Questions
		<ul style="list-style-type: none"> <li>• What are the planned and actual costs for my projects?</li> <li>• How much effort is planned per resource role for my projects?</li> </ul>
Project Management - Project Issues Real Time	Analyze the issues and related action items that you own or create, or that are related to projects that you manage. View real-time information across different dimensions such as project, owner, issue type, and status.	<ul style="list-style-type: none"> <li>• Which issues are open for my projects, along with their details?</li> <li>• Which issues are open for an individual owner?</li> <li>• What are my action items?</li> <li>• What patterns are apparent from historic performance on issues? What can we learn from analysis of issues that could help future project performance?</li> </ul>
Project Management - Project Hierarchy Real Time	Analyze project plan data such as cost, schedule, effort, and bill amounts rolled up to enterprise project structure. Analyze real-time information through project hierarchy metrics using dimensions such as project hierarchy, resource, employee, task, task hierarchy, progress status, time, project, and sprint.	<ul style="list-style-type: none"> <li>• What are the actual costs for my EPS elements?</li> <li>• What are the total costs for my EPS elements?</li> </ul>
Project Management - Project Resources Real Time	Analyze real-time project resource allocation information, for example, project labor and expense resource allocations using dimensions such as employee, resource class, resource, project role, project resource assignment status, project, and opportunity.	<ul style="list-style-type: none"> <li>• What are the statuses of the resources currently working on my projects?</li> <li>• Who are the planned resources assigned to my projects?</li> <li>• What are the allocated hours for my project resources?</li> </ul>
Project Management - Project Work Items Real Time	Analyze real-time project work item information and view specific project work item details such as deliverables, concepts, proposals, requirements specifications, product change orders, items, and negotiations. View real-time information through work item metrics using dimensions such as project, task, priority, and status.	<ul style="list-style-type: none"> <li>• What are the work items for my projects?</li> <li>• What are the work item statuses that determine the completion of my project tasks?</li> <li>• Which of my project deliverables are overdue, due soon, and yet to start?</li> <li>• What are the allocated hours for my project resources?</li> </ul>
Project Management - Requirements Real Time	Analyze real-time project backlog information for your project backlog items using dimensions such as requirement hierarchy, sprint, product, release, scrum master, backlog owner, project, and task.	<ul style="list-style-type: none"> <li>• What's the total number of backlog items by status for a product in a given sprint?</li> <li>• What's the total number of story points achieved in each sprint of a release?</li> <li>• Which of my backlog items have exceptions?</li> <li>• What are the planned hours for each backlog item?</li> <li>• What are the backlog items for my projects in a sprint?</li> <li>• What's the remaining effort for my backlog items?</li> </ul>

Subject Area	Description	Business Questions
Project Resource Management - Resource Management Real Time	Analyze real-time project resource assignment information, for example, project resource supply, demand (requests and assignments), and utilization using dimensions such as resource, resource pool, role, qualification, time, and project.	<ul style="list-style-type: none"> <li>Which requests are in Open or Resource Proposed status?</li> <li>What's the forecasted revenue and margin for resource requests that are in Open or Resource Proposed status?</li> </ul>
Project Resource Management - Resource Pool Real Time	Analyze real-time resource pool information using dimensions such as resource, resource pool, resource pool membership, resource pool hierarchy, department, and location.	<ul style="list-style-type: none"> <li>Which resources belong to a resource pool?</li> <li>What are the dates of pool membership for a resource?</li> <li>What's a resource's pool membership history since the resource was hired?</li> </ul>
Project Management - Task Management Real Time	Analyze the tasks that you own or create, including project tasks, to-do tasks, action items, and milestones.	<ul style="list-style-type: none"> <li>Which project tasks are due in 7 days?</li> <li>In how many days are my project tasks due?</li> <li>Which project tasks are incomplete?</li> <li>Which project tasks, milestones, and action items are due?</li> </ul>
Projects - Cross Subject Area Analysis - Real Time	Analyze real-time information on project performance, including budgets, forecasts, costs, commitments, revenue, and invoices using dimensions such as award, fiscal calendar, employee, project, task, organizations, and time.	<ul style="list-style-type: none"> <li>Is my project profitable?</li> <li>How much funding has my contract consumed?</li> <li>How much has been invoiced for my contract?</li> <li>How does my budgeted cost compare against my actual and forecast costs?</li> <li>What are my committed costs for a project?</li> <li>How does my budgeted revenue compare against my actual and forecast revenue?</li> </ul>
Projects - Grants Management - Award Analysis Real Time	Analyze real-time award information using dimensions such as award, award project, keyword, certification, reference types, and time.	<ul style="list-style-type: none"> <li>What are the awards for a specific keyword, for example, awards on diabetes research?</li> <li>Which award certifications expire in the next 30 days?</li> <li>What are the proposal numbers for the awards?</li> <li>Which are the certifications awarded for various projects?</li> </ul>
Projects - Grants Management - Award Funding Real Time	Analyze real-time award funding information using dimensions such as award, award project, budget period, funding source, sponsor, personnel, keyword, organization credits, and time.	<ul style="list-style-type: none"> <li>Which awards are currently active?</li> <li>Which awards are past their end dates but weren't closed?</li> <li>What's the allocated funding amount for each project of an active award?</li> </ul>

Subject Area	Description	Business Questions
		<ul style="list-style-type: none"> <li>What's the total funding by department year over year?</li> <li>What awards have funding not allocated to projects?</li> </ul>
Projects - Performance Reporting Real Time	Measure project performance using various summary reporting metrics such as total cost, ITD actual cost, revenue, billed amount, and so on at the project, task, and resource levels. Analyze project performance measures by fiscal periods to gain insight into holistic project health. You must submit the Update Project Performance Data process for different data sources so that your analyses and dashboards display accurate data.	<ul style="list-style-type: none"> <li>What's the project expenditure for a specific task and resource?</li> <li>Which tasks and resources don't have correct expense estimates?</li> <li>Which project generates the most revenue for my organization?</li> <li>Which task and resource have the highest costs? What's my budgeted profit and actual profit?</li> <li>What are my planning and actual cost amounts grouped by expenditure category and expenditure type?</li> </ul>
Projects - Program Performance Reporting Real Time	Analyze real-time information for programs and program performance. Measure program performance using various reporting metrics for billing, capitalization, costs, earned value, effort, margin, and revenue.	<ul style="list-style-type: none"> <li>Is the program on schedule and budget now and at completion?</li> <li>What's the operating margin for my program?</li> <li>How well did we plan for the program (current and original baselines)?</li> <li>What are the program's capitalizable costs?</li> </ul>
Projects - Award Distribution Funding Pattern Reporting Real Time	Analyze real-time information on funding patterns using dimensions like project, task, and award charging instructions for a specific time period.	<ul style="list-style-type: none"> <li>What costs were "potentially" processed using a funding pattern?</li> <li>What funding patterns are likely to fail in the near future?</li> </ul>

The following table lists the currencies supported by each subject area.

Subject Area	Ledger Currency	Entered Currency	Project Currency	Contract Currency
Projects - Period Close Exceptions	Yes	No	No	No
Project Billing - Event Real Time	Yes	Yes	Yes	Yes
Project Billing - Funding Real Time	No	No	No	Yes
Project Billing - Invoices Real Time	Yes	Yes	Yes	Yes

Subject Area	Ledger Currency	Entered Currency	Project Currency	Contract Currency
Project Billing - Revenue Real Time	Yes	Yes	Yes	Yes
Project Control - Budgets Real Time	Yes	Yes	Yes	No
Project Control - Forecasts Real Time	Yes	Yes	Yes	No
Project Control - Financial Project Plans Real Time	Yes	Yes	Yes	No
Project Control - Progress Real Time	Yes	No	Yes	No
Project Costing - Actual Costs Real Time	Yes	Yes	Yes  The project currency is valid for all measures except for the Transfer Price measures.	No
Project Costing - Assets Real Time	Yes	Yes	Yes	No
Project Costing - Commitments Real Time	Yes	Yes	Yes	No
Project Costing - Expenditure Item Performance - Real Time	Yes	Yes	Yes	No
Project Costing - Unprocessed Transactions Real Time	Yes	Yes	Yes	No
Projects - Labor Distribution Cost Analysis Real Time	Yes	Yes	Yes	No
Projects - Labor Schedule Analysis Real Time	No	No	No	No
Project Management - Baseline Versions Real Time	No	No	Yes	No
Project Management - Change Management Real Time	No	No	Yes	No

Subject Area	Ledger Currency	Entered Currency	Project Currency	Contract Currency
Project Management - Opportunity Integration Real Time	No	No	Yes	No
Project Management - Planning Real Time	No	No	Yes	No
Project Management - Project Issues Real Time	No	No	No	No
Project Management - Project Hierarchy Real Time	No	No	Yes	No
Project Management - Project Resources Real Time	No	No	No	No
Project Management - Project Work Items Real Time	No	No	No	No
Project Management - Requirements Real Time	No	No	No	No
Project Resource Management - Resource Management Real Time	No	No	Yes	No
Project Resource Management - Resource Pool Real Time	No	No	No	No
Project Management - Task Management Real Time	No	No	No	No
Projects - Cross Subject Area Analysis - Real Time	Yes	Yes	Yes	Yes The contract currency is valid only for invoice and revenue related measures.
Projects - Grants Management - Award Analysis Real Time	No	No	No	No
Projects - Grants Management - Award Funding Real Time	Yes	Yes	Yes	Yes

Subject Area	Ledger Currency	Entered Currency	Project Currency	Contract Currency
Projects - Performance Reporting Real Time	Yes	No	Yes	No

**Note:** For the Projects - Program Performance Reporting Real Time subject area, you should use the Program Budget or Enterprise currency.

*Related Topics*

- [Project Costing - Assets Real Time Measures](#)

## Available Dimensions for Project Management Subject Areas

Each subject area has a number of dimension folders and one fact folder. The dimension folders contain attribute and hierarchical columns.

Dimensions are joined to the fact folder within a subject area. If an analysis you use has the Currency attribute from a dimension folder, you see a currency column in the results. This table describes the dimensions you can use for analyses in Oracle Fusion Cloud Project Management.

Subject Area	Dimensions
Projects - Period Close Exceptions	<ul style="list-style-type: none"> <li>• Award</li> <li>• Employee</li> <li>• Event Details</li> <li>• Event Type</li> <li>• Exception Measures</li> <li>• Expenditure Class</li> <li>• Expenditure Item</li> <li>• Expenditure Type</li> <li>• Fiscal Calendar</li> <li>• Item</li> <li>• Job</li> <li>• Ledger</li> <li>• Message Details</li> <li>• Miscellaneous Inventory Transaction</li> <li>• Nonlabor Resource</li> <li>• Organizations</li> <li>• Payables Invoice Details</li> </ul>



Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Projects Calendar</li> <li>• Purchase Order Receipt Accrual</li> <li>• Report Detail</li> <li>• Root Cause Message Details</li> <li>• Supplier</li> <li>• Task</li> <li>• Transaction Common Details</li> <li>• Unprocessed Transaction Details</li> <li>• Work Type</li> </ul>
Projects - Billing and Revenue Exceptions Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Bill Transaction</li> <li>• Business Unit</li> <li>• Contract</li> <li>• Currency</li> <li>• Employee</li> <li>• Event</li> <li>• Exception Measures</li> <li>• Exceptions</li> <li>• Expenditure Item</li> <li>• Institution</li> <li>• Invoice</li> <li>• Job</li> <li>• Ledger</li> <li>• Legal Entity</li> <li>• Nonlabor Resource</li> <li>• Organization</li> <li>• Primary Sponsor</li> <li>• Project</li> <li>• Project Role</li> <li>• Task</li> <li>• Time</li> <li>• Work Type</li> </ul>
Project Billing - Bill Transactions Real Time	<ul style="list-style-type: none"> <li>• Bill Transaction</li> <li>• Business Unit</li> <li>• Contract</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Currency</li> <li>• Customer</li> <li>• Employee</li> <li>• Event</li> <li>• Expenditure Item</li> <li>• Item</li> <li>• Job</li> <li>• Ledger</li> <li>• Legal Entity</li> <li>• Measures - Bill Transaction</li> <li>• Nonlabor Resource</li> <li>• Organization</li> <li>• Pricing</li> <li>• Project</li> <li>• Project Role</li> <li>• Revenue</li> <li>• Supplier</li> <li>• Task</li> <li>• Time</li> <li>• Work Type</li> </ul>
Project Billing - Event Real Time	<ul style="list-style-type: none"> <li>• Billing Event Measures</li> <li>• Currency Exchange Details</li> <li>• Event Details</li> <li>• Event Type</li> <li>• Fiscal Calendar</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> </ul>
Project Billing - Funding Real Time	<ul style="list-style-type: none"> <li>• Contract Customer</li> <li>• Contract Customer Account</li> <li>• Currency Details</li> <li>• Fiscal Calendar</li> <li>• Funding Details</li> <li>• Organizations</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Project Contract Measures</li> <li>• Project Funding Measures</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> </ul>
Project Billing - Invoices Real Time	<ul style="list-style-type: none"> <li>• Associated Task</li> <li>• Associated Task Hierarchy</li> <li>• Award</li> <li>• Bill-to Customer</li> <li>• Bill-to Customer Account</li> <li>• Contract Customer</li> <li>• Contract Customer Account</li> <li>• Contract and Project Details</li> <li>• Credits and Write-offs</li> <li>• Currency Exchange Details</li> <li>• Customer Details</li> <li>• Employee</li> <li>• Event Details</li> <li>• Expenditure Item</li> <li>• Expenditure Type</li> <li>• Fiscal Calendar</li> <li>• Institution</li> <li>• Intercompany and Interproject Details</li> <li>• Invoice Calculation</li> <li>• Invoice Details</li> <li>• Invoice Processing</li> <li>• Invoice Transaction Measures</li> <li>• Ledger</li> <li>• Legal Entity</li> <li>• Organizations</li> <li>• Primary Sponsor</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Receiver Fiscal Calendar</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Tax Details</li> <li>• Time</li> </ul>
Project Billing - Revenue Real Time	<ul style="list-style-type: none"> <li>• Accounting Class</li> <li>• Award</li> <li>• Balancing Segment</li> <li>• Contract Customer Account</li> <li>• Contract and Project Details</li> <li>• Cost Center</li> <li>• Currency Exchange Details</li> <li>• Employee</li> <li>• Event Details</li> <li>• Expenditure Item</li> <li>• Fiscal Calendar</li> <li>• GL Accounting Date</li> <li>• GL Accounting Date Fiscal Calendar</li> <li>• General Ledger Account</li> <li>• Institution</li> <li>• Intercompany and Interproject Details</li> <li>• Job</li> <li>• Ledger</li> <li>• Legal Entity</li> <li>• Natural Account</li> <li>• Organizations</li> <li>• Primary Sponsor</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Receiver Fiscal Calendar</li> <li>• Revenue Accounting Details</li> <li>• Revenue Calculation</li> <li>• Revenue Details</li> <li>• Revenue Transaction Measures</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> </ul>
Project Control - Budgets Real Time	<ul style="list-style-type: none"> <li>• Award</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Employee</li> <li>• Fiscal Calendar</li> <li>• Institution</li> <li>• Organizations</li> <li>• Primary Sponsor</li> <li>• Project</li> <li>• Project Budget</li> <li>• Project Budget Version</li> <li>• Projects Calendar</li> <li>• Receiver Fiscal Calendar</li> <li>• Resources</li> <li>• Resource Class</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> </ul>
Project Control - Forecasts Real Time	<ul style="list-style-type: none"> <li>• Employee</li> <li>• Fiscal Calendar</li> <li>• Forecast Fact</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Forecast Version</li> <li>• Projects Calendar</li> <li>• Receiver Fiscal Calendar</li> <li>• Resources</li> <li>• Resource Class</li> <li>• Task</li> <li>• Task hierarchy</li> <li>• Time</li> </ul>
Project Control - Financial Project Plans Real Time	<ul style="list-style-type: none"> <li>• Currency</li> <li>• Financial Project Plan</li> <li>• Fiscal Calendar</li> <li>• Milestone</li> <li>• Project</li> <li>• Project Plan Type</li> <li>• Projects Calendar</li> <li>• Resource</li> <li>• Task</li> <li>• Task Hierarchy</li> </ul>

Subject Area	Dimensions
Project Control - Progress Real Time	<ul style="list-style-type: none"> <li>• Organizations</li> <li>• Milestone</li> <li>• Progress</li> <li>• Progress As Of Date</li> <li>• Progress Measures</li> <li>• Progress Status</li> <li>• Progress</li> <li>• Project</li> <li>• Task</li> </ul>
Project Costing - Actual Costs Real Time	<ul style="list-style-type: none"> <li>• Accounting Class</li> <li>• Adjustment Details</li> <li>• Associated Project Contract Header Details</li> <li>• Associated Project Contract Line Details</li> <li>• Award</li> <li>• Balancing Segment</li> <li>• Capitalization Details</li> <li>• Cost Accounting Details</li> <li>• Cost Center</li> <li>• Currency Exchange Details</li> <li>• Effort Details</li> <li>• Employee</li> <li>• Expenditure Class</li> <li>• Expenditure Item</li> <li>• Expenditure Item Billing Details</li> <li>• Expenditure Item Revenue Details</li> <li>• Expenditure Item and Cost Distribution Cross-Charge Transaction Details</li> <li>• Expenditure Item and Cost Distribution Details</li> <li>• Expenditure Type</li> <li>• Fiscal Calendar</li> <li>• GL Accounting Date</li> <li>• GL Accounting Date Fiscal Calendar</li> <li>• General Ledger Account</li> <li>• Imported Cost Accounts</li> <li>• Institution</li> <li>• Item</li> <li>• Job</li> <li>• Ledger</li> <li>• Legal Entity</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Natural Account</li> <li>• Nonlabor Resource</li> <li>• Organizations</li> <li>• Original Source References</li> <li>• Primary Sponsor</li> <li>• Processing Details</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Projects Calendar</li> <li>• Receiver Fiscal Calendar</li> <li>• Receiver Ledger Currency Exchange Details</li> <li>• Supplier</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> <li>• Transaction Common Details</li> <li>• Transfer Price Currency Exchange Details</li> <li>• Work Type</li> </ul>
Projects Costing - Assets Real Time	<ul style="list-style-type: none"> <li>• Capital Event</li> <li>• Cost Distribution Line</li> <li>• Currency Exchange Details</li> <li>• Expenditure Item</li> <li>• Project</li> <li>• Project Asset</li> <li>• Project Asset Line</li> <li>• Time</li> </ul>
Project Costing - Commitments Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Commitment Details</li> <li>• Currency Details for Commitments</li> <li>• Expenditure Class</li> <li>• Expenditure Type</li> <li>• Fiscal Calendar</li> <li>• Institution</li> <li>• Item</li> <li>• Ledger</li> <li>• Legal Entity</li> <li>• Organizations</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Primary Sponsor</li> <li>• Project</li> <li>• Projects Calendar</li> <li>• Receiver Fiscal Calendar</li> <li>• Resource Class</li> <li>• Supplier</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> <li>• Work Type</li> </ul>
Project Costing - Expenditure Item Performance - Real Time	<ul style="list-style-type: none"> <li>• Capitalization Details</li> <li>• Currency Exchange Details</li> <li>• Effort Details</li> <li>• Employee</li> <li>• Expenditure Class</li> <li>• Expenditure Item Billing Details</li> <li>• Expenditure Item Details</li> <li>• Expenditure Item Revenue Details</li> <li>• Expenditure Type</li> <li>• Item</li> <li>• Job</li> <li>• Legal Entity</li> <li>• Nonlabor Resource</li> <li>• Organizations</li> <li>• Original Source References</li> <li>• Processing Details</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Receiver Ledger Currency Exchange Details</li> <li>• Supplier</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Work Type</li> <li>• Comments</li> </ul>
Project Costing - Unprocessed Transactions Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Currency Exchange Details for Unprocessed Transactions</li> <li>• Employee</li> </ul>



Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Error Details</li> <li>• Expenditure Class</li> <li>• Expenditure Type</li> <li>• Imported Cost Accounts</li> <li>• Institution</li> <li>• Item</li> <li>• Job</li> <li>• Nonlabor Resources</li> <li>• Organizations</li> <li>• Primary Sponsor</li> <li>• Project</li> <li>• Projects Calendar</li> <li>• Supplier</li> <li>• Task</li> <li>• Task hierarchy</li> <li>• Time</li> <li>• Unprocessed Transactions Adjustment Details</li> <li>• Unprocessed Transactions Details</li> <li>• Unprocessed Transactions Effort Details</li> <li>• Unprocessed Transactions Original Source References</li> <li>• Unprocessed Transactions Processing Details</li> <li>• Work Type</li> </ul> <p><b>Note:</b> Use the Message Action attribute along with the Message Name attribute in the same folder to view applicable data. The Message Action attribute in the Error Details folder is not directly mapped to a physical table or column and doesn't have a qualifying table to use in the Select statement. This is why you do not see any values coming in when you attempt to retrieve only this data. The same is true of the remaining attributes in this folder as well.</p>
Projects - Labor Distribution Cost Analysis Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Award Funding Source</li> <li>• Employee</li> <li>• Expenditure Type</li> <li>• Fiscal Calendar</li> <li>• General Ledger Account</li> <li>• Labor Cost Distributions Details</li> <li>• Labor Cost Distributions Measures</li> <li>• Labor Schedules Details</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Contract Header Details</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Task</li> <li>• Time</li> <li>• Work Type</li> </ul>
Projects - Labor Schedule Analysis Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Award Funding Source</li> <li>• Employee</li> <li>• Expenditure Type</li> <li>• General Ledger Account</li> <li>• Labor Schedules Details</li> <li>• Labor Schedules Measures</li> <li>• Labor Version Dates</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Task</li> <li>• Time</li> <li>• Work Type</li> </ul>
Project Management - Baseline Versions Real Time	<ul style="list-style-type: none"> <li>• Baseline Version Details</li> <li>• Baseline Version Measures</li> <li>• Organizations</li> <li>• Primary Resource</li> <li>• Project</li> <li>• Task</li> <li>• Task Hierarchy</li> </ul>
Project Management - Change Management Real Time	<ul style="list-style-type: none"> <li>• Change Management Measures</li> <li>• Change Order</li> <li>• Organizations</li> <li>• Project</li> <li>• Time</li> </ul>
Project Management - Opportunity Integration Real Time	<ul style="list-style-type: none"> <li>• Currency Detail</li> <li>• Opportunity</li> <li>• Opportunity Based Measures</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Plan Dates</li> <li>• Project Planning Measures</li> <li>• Project Progress Status</li> </ul>

Subject Area	Dimensions
Project Management - Planning Real Time	<ul style="list-style-type: none"> <li>• Time</li> </ul> <ul style="list-style-type: none"> <li>• Employee</li> <li>• Milestone</li> <li>• Organizations</li> <li>• Primary Resource</li> <li>• Project</li> <li>• Project Plan Baseline</li> <li>• Project Plan Dates</li> <li>• Project Plan Details</li> <li>• Project Planning Measures</li> <li>• Project Progress Status</li> <li>• Resource</li> <li>• Resource Class</li> <li>• Sprint</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> </ul> <p><b>Note:</b>                      For the Milestone dimension, only milestones meeting the following criteria are eligible:</p> <ul style="list-style-type: none"> <li>Start Date = End Date</li> <li>Duration = 0</li> <li>Milestone Flag = Yes</li> <li>Lowest level in the project plan = Yes</li> </ul>
Project Management - Project Issues Real Time	<ul style="list-style-type: none"> <li>• Action Item Creator</li> <li>• Action Item Details</li> <li>• Action Item Measures</li> <li>• Action Item Owner</li> <li>• Action Item Status</li> <li>• Issue Closed Reason</li> <li>• Issue Creator</li> <li>• Issue Details</li> <li>• Issue Measures</li> <li>• Issue Owner</li> <li>• Issue Priority</li> <li>• Issue Status</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Issue Type</li> <li>• Organizations</li> <li>• Project</li> <li>• Time</li> </ul>
Project Management - Project Hierarchy Real Time	<ul style="list-style-type: none"> <li>• Opportunity</li> <li>• Opportunity Based Measures</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Hierarchy</li> <li>• Project Hierarchy Measures</li> <li>• Project Progress Status</li> <li>• Time</li> </ul>
Project Management - Project Resources Real Time	<ul style="list-style-type: none"> <li>• Employee</li> <li>• Opportunity</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Resource Details</li> <li>• Project Resource Finish Date</li> <li>• Project Resource Measures</li> <li>• Project Resource Start Date</li> <li>• Project Role</li> <li>• Resource</li> <li>• Resource Assignment Status</li> <li>• Resource Class</li> <li>• Time</li> </ul>
Project Management - Project Work Items Real Time	<ul style="list-style-type: none"> <li>• Organizations</li> <li>• Project</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> <li>• Work Item Creator</li> <li>• Work Item Details</li> <li>• Work Item Measures</li> <li>• Work Item Owner</li> <li>• Work Item Priority</li> <li>• Work Item Status</li> <li>• Work Item Type</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Milestone</li> </ul>
Project Management - Requirements Real Time	<ul style="list-style-type: none"> <li>• Acceptance Criteria</li> <li>• Backlog Item Details</li> <li>• Backlog Item Measures</li> <li>• Milestone</li> <li>• Organizations</li> <li>• Owner</li> <li>• Priority</li> <li>• Product</li> <li>• Project</li> <li>• Release</li> <li>• Requirement</li> <li>• Requirement Hierarchy</li> <li>• Scrum Master</li> <li>• Sprint</li> <li>• Status</li> <li>• Task</li> <li>• Task Effort Measures</li> </ul>
Project Management - Task Management Real Time	<ul style="list-style-type: none"> <li>• Issue</li> <li>• Milestone</li> <li>• Organizations</li> <li>• Primary Resource</li> <li>• Project</li> <li>• Project Progress Status</li> <li>• Resource</li> <li>• Tag</li> <li>• Task</li> <li>• Task Creator</li> <li>• Task Dates</li> <li>• Task Follower</li> <li>• Task Management Details</li> <li>• Task Management Measures</li> <li>• Task Owner</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Task Type</li> </ul> <p><b>Note:</b>                      For the Milestone dimension, only milestones meeting the following criteria are eligible:</p> <p>Start Date = End Date</p> <p>Duration = 0</p> <p>Milestone Flag = Yes</p> <p>Lowest level in the project plan = Yes</p>
Project Resource Management - Resource Management Real Time	<ul style="list-style-type: none"> <li>• Assignment</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Assignment Dates</li> <li>• Project Request Dates</li> <li>• Project Resource Actual</li> <li>• Project Resource Assignment</li> <li>• Project Resource Request</li> <li>• Project Resource Supply</li> <li>• Project Resource Utilization</li> <li>• Project Role</li> <li>• Qualification</li> <li>• Request</li> <li>• Resource</li> <li>• Supply</li> <li>• Time</li> </ul>
Project Resource Management - Resource Pool Real Time	<ul style="list-style-type: none"> <li>• Resource</li> <li>• Resource Pool</li> </ul>
Projects - Cross Subject Area Analysis - Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Award Funding Details</li> <li>• Award Funding Measures</li> <li>• Award Project Funding Measures</li> <li>• Bill-to Customer</li> <li>• Budget Transaction Measures</li> <li>• Commitment Transaction Measures</li> <li>• Cost Transaction Measures</li> <li>• Currency</li> <li>• Employee</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Fiscal Calendar</li> <li>• Forecast Transaction Measures</li> <li>• Invoice Transaction Measures</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Receiver Fiscal Calendar</li> <li>• Resource</li> <li>• Revenue Transaction Measures</li> <li>• Task</li> <li>• Task Hierarchy</li> <li>• Time</li> </ul>
Projects - Grants Management - Award Analysis Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Award Certification Measures</li> <li>• Award Keyword Measures</li> <li>• Award Reference Measures</li> <li>• Certification</li> <li>• Keyword</li> <li>• Project</li> <li>• Reference Type</li> </ul> <p><b>Note:</b> You can review the award cost share attributes for the internal funding sources only if either the award funding amount (from the Award Funding Measures folder) or the number of funding sources (from the Award Funding Source -&gt; Award Funding Source Measures folder) is selected from the Projects - Grants Management - Award Funding Real Time or Projects – Grants Management – Award Analysis Real Time subject area. This applies to all subject areas where the Award Funding Source cost share attributes are available.</p>
Projects - Grants Management - Awards Funding Real Time	<ul style="list-style-type: none"> <li>• Award</li> <li>• Award Funding Details</li> <li>• Award Funding Measures</li> <li>• Award Keyword Measures</li> <li>• Award Performance Measures</li> <li>• Award Project</li> <li>• Award Project Funding Measures</li> <li>• Fiscal Calendar</li> <li>• Institution</li> <li>• Keyword</li> <li>• Organization Credit</li> <li>• Organizations</li> </ul>

Subject Area	Dimensions
	<ul style="list-style-type: none"> <li>• Personnel</li> <li>• Primary Sponsor</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Terms and Conditions</li> <li>• Time</li> </ul> <p><b>Note:</b> You can review the award cost share attributes for the internal funding sources only if either the award funding amount (from the Award Funding Measures folder) or the number of funding sources (from the Award Funding Source -&gt; Award Funding Source Measures folder) is selected from the Projects - Grants Management - Award Funding Real Time or Projects – Grants Management – Award Analysis Real Time subject area. This applies to all subject areas where the Award Funding Source cost share attributes are available.</p>
Projects - Performance Reporting Real Time	<ul style="list-style-type: none"> <li>• Fiscal Calendar</li> <li>• Organizations</li> <li>• Project</li> <li>• Project Contract Header Details</li> <li>• Project Contract Line Details</li> <li>• Project Performance Measures</li> <li>• Resource</li> <li>• Resource Class</li> <li>• Resource Hierarchy</li> <li>• Task</li> <li>• Task Hierarchy</li> </ul>
Projects - Program Performance Reporting Real Time	<ul style="list-style-type: none"> <li>• Fiscal Calendar</li> <li>• Program Details</li> <li>• Program Hierarchy</li> <li>• Program Performance Details</li> <li>• Program Performance Measures</li> </ul>
Projects - Funding Pattern Analysis Real Time	<ul style="list-style-type: none"> <li>• Number of Distribution Sets</li> <li>• Number of Distribution Rules</li> <li>• Total Rule Percent</li> </ul>



# Predefined Analytics for Project Management

You can use the following predefined analyses and dashboards for your reporting needs. Based on your requirements, you can use these directly or copy and customize them.

Subject Area	Title
Project Billing - Event Real Time	<ul style="list-style-type: none"> <li>• Project Billing Events</li> <li>• Project Billing - Invoiced Transactions</li> </ul> <p>This analysis is also listed under the Project Billing - Invoices Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Revenue - Recognized Transactions</li> </ul> <p>This analysis is also listed under the Project Billing - Revenue Real Time subject area.</p>
Project Billing - Funding Real Time	<ul style="list-style-type: none"> <li>• Project Contract Lines</li> <li>• Project Contract List</li> </ul> <p>These analyses are also listed under the Project Billing - Invoices Real Time and Project Billing - Revenue Real Time subject areas.</p>
Project Billing - Invoices Real Time	<ul style="list-style-type: none"> <li>• Project Contract Lines</li> </ul> <p>This analysis is also listed under the Project Billing - Funding Real Time and Project Billing - Revenue Real Time subject areas.</p> <ul style="list-style-type: none"> <li>• Project Contract List</li> </ul> <p>This analysis is also listed under the Project Billing - Funding Real Time and Project Billing - Revenue Real Time subject areas.</p> <ul style="list-style-type: none"> <li>• Project Billing - Invoiced Transactions</li> </ul> <p>This analysis is also listed under the Project Billing - Event Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Billing - Invoice Lines</li> <li>• Invoices by Status</li> </ul>
Project Billing - Revenue Real Time	<ul style="list-style-type: none"> <li>• Project Revenue - Recognized Transactions</li> </ul> <p>This analysis is also listed under the Project Billing - Event Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Revenue - Contract Lines</li> <li>• Revenue by Contract</li> <li>• Project Income Statement</li> </ul> <p>This analysis is also listed under the Project Costing - Actual Costs Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Contract Lines</li> </ul> <p>This analysis is also listed under the Project Billing - Invoices Real Time and Project Billing - Funding Real Time subject areas.</p>

Subject Area	Title
	<ul style="list-style-type: none"> <li>• Project Contract List</li> </ul> <p>This analysis is also listed under the Project Billing - Invoices Real Time and Project Billing - Funding Real Time subject areas.</p>
Project Control - Budgets Real Time	<ul style="list-style-type: none"> <li>• Budget vs Actual Cost Comparison</li> </ul> <p>This analysis is also listed under the Project Costing - Actual Costs Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Tasks</li> <li>• Project List</li> </ul>
Project Costing - Actual Costs Real Time	<ul style="list-style-type: none"> <li>• Project Income Statement</li> </ul> <p>This analysis is also listed under the Project Billing - Revenue Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Budget vs Actual Cost Comparison</li> </ul> <p>This analysis is also listed under the Project Control - Budgets Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Cost Account Reconciliation</li> <li>• Project Cost by Transaction Source Details</li> <li>• Project Cost by Transaction Source</li> <li>• Project Expenditure Items</li> </ul> <p>This analysis is also listed under the Project Costing - Commitments Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Capital Costs</li> </ul> <p>This analysis is also listed under the Project Costing - Commitments Real Time subject area.</p>
Project Costing - Assets Real Time	<ul style="list-style-type: none"> <li>• Capital Expenditures</li> <li>• Uncapitalizable Cost for Capitalizable Tasks</li> <li>• Capital Asset Assignments</li> <li>• Capital Asset Lines</li> <li>• Capital Assets</li> </ul>
Project Costing - Commitments Real Time	<ul style="list-style-type: none"> <li>• Project Expenditure Items</li> <li>• Project Capital Costs</li> </ul> <p>These analyses are also listed under the Project Costing - Actual Costs Real Time subject area.</p>
Project Management - Change Management Real Time	<ul style="list-style-type: none"> <li>• Change Orders by Participant Status</li> <li>• Change Orders by Reason</li> <li>• Change Order Details</li> <li>• Pending Change Orders Summary</li> </ul>
Project Management - Baseline Versions Real Time	Baseline Trend Analysis

Subject Area	Title
Project Management - Planning Real Time	<ul style="list-style-type: none"> <li>• Tasks Scheduled Outside of Resource Assignment Dates</li> </ul> <p>This analysis is also listed under the Project Management - Project Resources Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Resource Allocation and Task Assignment Comparison by Week</li> </ul> <p>This analysis is also listed under the Project Management - Planning Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Project Cost Variance</li> <li>• Planned and Actual Project Labor Comparison</li> <li>• Actual Project Labor Margin</li> <li>• Baseline Variance Analysis Report</li> <li>• Planned and Actual Dates Comparison Report</li> </ul>
Project Management - Project Issues Real Time	<ul style="list-style-type: none"> <li>• Action Item Details</li> <li>• Closed Issue Analysis</li> <li>• Detail of Open Issues</li> <li>• Issue Analysis by Project</li> <li>• Issues Aging</li> <li>• Issues by Type</li> <li>• Issue Details</li> <li>• My Open Action Items</li> <li>• My Open Issues</li> <li>• Open Action Items by Project</li> </ul>
Project Management - Project Hierarchy Real Time	<ul style="list-style-type: none"> <li>• Delegate Access Analysis</li> <li>• Owner Access Analysis</li> <li>• Remaining Project Hours</li> <li>• Total and Actual EPS Node Cost</li> <li>• Total Project Hours</li> </ul>
Project Management - Project Resources Real Time	<ul style="list-style-type: none"> <li>• Tasks Scheduled Outside of Resource Assignment Dates</li> </ul> <p>This analysis is also listed under the Project Management - Planning Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Resource Allocation and Task Assignment Comparison by Week</li> </ul> <p>This analysis is also listed under the Project Management - Planning Real Time subject area.</p> <ul style="list-style-type: none"> <li>• Placeholder Resources on My Projects</li> <li>• Resources Currently on My Projects</li> </ul>
Project Management - Project Work Items Real Time	<ul style="list-style-type: none"> <li>• Deliverables Due in My Projects</li> <li>• Deliverables Not Started in My Projects</li> <li>• All Work Items in My Projects</li> </ul>
Project Management - Requirements Real Time	<ul style="list-style-type: none"> <li>• Backlog Completeness Check Analysis</li> </ul>

Subject Area	Title
	<ul style="list-style-type: none"> <li>Backlog Item Sprint Velocity Analysis</li> <li>Backlog Items Status Analysis</li> <li>Project Hours by Backlog Item Analysis</li> </ul>
Project Resource Management - Resource Management Real Time	<ul style="list-style-type: none"> <li>Projected Revenue Shortfall by Resource</li> <li>Requested Resource Forecast Revenue Details</li> <li>Project Resource Request Forecast Revenue</li> <li>Resource Pool Projected and Actual Utilization by Resource</li> <li>Resource Pool Actual Utilization by Resource and Month</li> <li>Resource Capacity Planning by Project Role</li> </ul>
Project Management - Task Management Real Time	<ul style="list-style-type: none"> <li>Project Work Coming Due</li> <li>My Upcoming Tasks</li> </ul>
Project Resource Management - Resource Pool Real Time	<ul style="list-style-type: none"> <li>Project Resource Assignment History by Resource Pool and Resource Report</li> <li>Project Resource Request History by Resource Pool and Resource Report</li> <li>Project Resource Request Resources by Project or Request Report</li> </ul>
Projects - Cross Subject Area Analysis - Real Time	Actual Cost Analysis by Resource Type
Projects - Grants Management - Award Funding Real Time	<ul style="list-style-type: none"> <li>Award Project Funding Details</li> <li>Award List</li> </ul>

## Assets

### Project Capital Costs Dashboard

The Project Capital Costs dashboard displays actual and committed costs for capital projects, including capitalization details.

The dashboard uses the Project Costing - Actual Costs Real Time and Project Costing - Commitment Real Time subject areas.

The dashboard consists of the Project Capital Costs Analysis and you can drill down to the Project Expenditure Items Analysis from the Project Capital Costs Analysis.

### Key Insights

This dashboard answers the following business questions:

- What are the actual and committed costs incurred by my capital projects?
- How much of this cost is capitalizable?

- How much of this cost is already capitalized?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Accountant</li> <li>• Project Manager</li> </ul>
When do I use this dashboard?	When you need to know how much of the actual and committed costs for a capital project is capitalizable and how much of these costs is already capitalized.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the list of projects by:                             <ul style="list-style-type: none"> <li>○ Project Business Unit</li> <li>○ Project Organization</li> <li>○ Project Status</li> </ul> </li> <li>• Drill down to the Project Expenditure Items analysis using the Total Cost column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Project Organization	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Values limited by Project Business Unit</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Project Status	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection specific value: Approved</li> </ul>

Column	Type	Rules
Enable Capitalization	Filter	Equals 'Y'
Template	Filter	Not 'Y'

The following table lists the views in the Project Capital Costs analysis.

View	Displayed Information
View Name	Project Capital Costs
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project                             <ol style="list-style-type: none"> <li>a. Project Number</li> <li>b. Currency Code</li> </ol> </li> <li>2. Total Cost</li> <li>3. Actual Cost</li> <li>4. Committed Costs                             <ol style="list-style-type: none"> <li>a. Purchase Requisition</li> <li>b. Purchase Order</li> <li>c. Supplier Invoice</li> </ol> </li> <li>5. Capitalization Details                             <ol style="list-style-type: none"> <li>a. Capitalizable Total Cost</li> <li>b. Capitalizable Actual Cost</li> <li>c. Capitalizable Committed Cost</li> <li>d. Capitalized Cost</li> </ol> </li> </ol>

## Capital Asset Assignments Dashboard

The Capital Asset Assignments dashboard displays how your assets and asset costs are assigned to your projects and tasks.

The dashboard uses the Project Costing - Assets Real Time subject area.

The dashboard consists of Capital Asset Assignments analysis.

### Key Insights

This dashboard answers the following business questions:

- What's the total cost of assets assigned at the project level?
- Which assets are assigned to a task?
- Which assets aren't assigned?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Accountant
When do I use this dashboard?	When you need to: <ul style="list-style-type: none"> <li>Review how assets are assigned to projects and tasks.</li> <li>Group your assets by asset type and category.</li> </ul>
What can I do with this dashboard?	You can view: <ul style="list-style-type: none"> <li>Assets grouped by                             <ul style="list-style-type: none"> <li>Asset type</li> <li>Asset category</li> </ul> </li> <li>Costs for these asset groups.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Required</li> <li>Select multiple values enabled</li> <li>Default selection SQL:  <code>select min ("Project"."Project Number") from "Project Costing - Assets Real Time"</code> </li> </ul>
Asset Category	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Task Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>

Column	Type	Rules
Task Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Grouping Level Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Capital Asset Assignment Report.

View	Displayed Information
View Name	Capital Asset Assignments Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Number</li> <li>Project Name</li> <li>Asset Category</li> <li>Asset Type</li> <li>Grouping Level Type</li> <li>Asset Number</li> <li>Asset Name</li> <li>Asset Key</li> <li>Currency</li> <li>Estimated Asset Units</li> <li>Actual Asset Units</li> <li>Estimated Asset Cost</li> <li>Asset Cost</li> <li>Asset Task - Task Number</li> <li>Asset Task - Task Name</li> </ol>

## Capital Asset Lines Dashboard

The Capital Asset Lines dashboard displays the expenditure items and cost distributions that are allocated and assigned to an asset in a given period.

The dashboard uses the Project Costing - Assets Real Time subject area.

The dashboard consists of Capital Asset Lines analysis.

### Key Insights

This dashboard answers the following business questions:

- Which asset lines contribute to my assets?
- What's the total capitalized cost of my assets?



- How's an expenditure item allocated across assets?
- Which cost distributions are included in an asset line?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Accountant
When do I use this dashboard?	When you need to: <ul style="list-style-type: none"> <li>• Perform detailed analysis to determine which expenditure items and cost distribution lines are allocated and assigned to an asset in a given period.</li> <li>• Review how expenditure items are grouped into asset lines.</li> </ul>
What can I do with this dashboard?	You can review and analyze: <ul style="list-style-type: none"> <li>• The asset lines that contribute to your total assets.</li> <li>• You total capitalized and CIP cost.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                      select min("Project"."Project Number")                      from "Project Costing - Assets Real Time"</li> </ul>
Capital Event Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Transaction Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Asset Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Asset Line Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Accounting Period	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Required</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Capital Asset Lines Report.

View	Displayed Information
View Name	Capital Asset Lines Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Asset Category</li> <li>Capital Event Number</li> <li>Asset Number</li> <li>Asset Name</li> <li>Asset Line Number</li> <li>Asset Line Task Number</li> <li>Asset Line Task Name</li> <li>Expenditure Organization</li> <li>Asset Period</li> <li>Transaction Number</li> <li>Transaction Date</li> <li>Expenditure Type</li> <li>Distribution Line Number</li> <li>Currency</li> <li>Capitalized Cost</li> <li>CIP Cost</li> </ol>

## Capital Assets Dashboard

The Capital Assets dashboard displays the details of your capital assets.

The dashboard uses the Project Costing - Assets Real Time subject area.

The dashboard consists of Capital Assets analysis.

## Key Insights

This dashboard answers the following business questions:

- Which assets are built and placed in service?
- Which assets don't have a complete asset definition?
- What's the total cost of each asset?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Accountant
When do I use this dashboard?	When you need to: <ul style="list-style-type: none"> <li>• Review the assets created for a project.</li> <li>• Ensure that all assets are defined and that the asset attributes are correct.</li> </ul>
What can I do with this dashboard?	You can review: <ul style="list-style-type: none"> <li>• Actual asset in-service date</li> <li>• Number of asset units</li> <li>• Total asset cost</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                      select min("Project"."Project Number")                      from "Project Costing - Assets Real Time"</li> </ul>
Task Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Select multiple values enabled</li> </ul>
Task Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Asset Category	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Capital Assets Report.

View	Displayed Information
View Name	Capital Assets Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Asset Category</li> <li>Asset Type</li> <li>Asset Number</li> <li>Asset Key</li> <li>Asset Name</li> <li>Estimated In-Service Date</li> <li>Actual In-Service Date</li> <li>Asset Book</li> <li>Book Currency</li> <li>Estimated Asset Units</li> <li>Actual Asset Units</li> <li>Currency</li> <li>Standard Unit Cost</li> <li>Estimated Asset Cost</li> <li>Total Asset Cost</li> </ol>

## Noncapitalized Cost for Capitalizable Tasks Dashboard

The Noncapitalized Cost for Capitalizable Tasks dashboard displays the noncapitalizable cost for your capitalizable project tasks.

The dashboard uses the Project Costing - Assets Real Time subject area.

The dashboard consists of the Noncapitalized Cost for Capitalizable Tasks analysis.

### Key Insights

This dashboard answers the following business questions:

- What are the total costs for my capitalizable tasks?

- What percentage of my task costs is not capitalizable?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Accountant
When do I use this dashboard?	When you need to: <ul style="list-style-type: none"> <li>• Review charges that are expensed for capitalizable tasks.</li> <li>• Ensure that costs are classified correctly and that expenses charged to the task are appropriate.</li> </ul>
What can I do with this dashboard?	You can review: <ul style="list-style-type: none"> <li>• Total costs for your project tasks.</li> <li>• Percentage of total task costs that's not capitalizable.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                      select min("Project"."Project Number")                      from "Project Costing - Assets Real Time"</li> <li>• Default value: Burd_2701Proj</li> </ul>
Expenditure Organization	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Project Accounting Period	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> </ul>
Project Name	Filter	Prompted

Column	Type	Rules

The following table lists the views in the Noncapitalized Cost for Capitalizable Tasks Report.

View	Displayed Information
View Name	Noncapitalized Cost for Capitalizable Tasks Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Transaction Date</li> <li>2. Expenditure Organization</li> <li>3. Task Manager</li> <li>4. Expenditure Task Number</li> <li>5. Expenditure Task Name</li> <li>6. Transaction Number</li> <li>7. Expenditure Type</li> <li>8. Currency</li> <li>9. Expense Cost</li> <li>10. Total Task Cost</li> <li>11. Percent of Total Cost</li> </ol>

## Capital Expenditures Dashboard

The Capital Expenditures dashboard displays the capital expenditure items for your assets.

The dashboard uses the Project Costing - Assets Real Time subject area.

The dashboard consists of the Capital Expenditures analysis.

### Key Insights

This dashboard answers the following business questions:

- What's the total capitalized cost of my assets?
- How's an expenditure item allocated across assets?
- Which cost distributions are included in an asset line?
- Which assets are assigned to a task?
- Which assets aren't assigned?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to: <ul style="list-style-type: none"> <li>• View and understand where expenditures are in the capitalization process.</li> <li>• Identify activities that must be performed or issues that must be addressed.</li> </ul>
What can I do with this dashboard?	You can review the following for your assets: <ul style="list-style-type: none"> <li>• Ungrouped cost</li> <li>• Unassigned cost</li> <li>• Assigned cost</li> <li>• Transferred cost</li> <li>• Capitalized cost</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Filter	Prompted
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL</li> </ul> <pre>select min("Project"."Project Number") from "Project Costing - Assets Real Time"</pre>
Task Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Task Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Project Accounting Period Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Capital Expenditures Report.

View	Displayed Information
View Name	Capital Expenditures Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Expenditure Task Number</li> <li>2. Expenditure Task Name</li> <li>3. Expenditure Type</li> <li>4. Transaction Number</li> <li>5. Distribution Line Number</li> <li>6. Capital Event Number</li> <li>7. Asset Line Number</li> <li>8. Asset Period</li> <li>9. Asset Number</li> <li>10. Currency</li> <li>11. Ungrouped Cost</li> <li>12. Unassigned Cost</li> <li>13. Assigned Cost</li> <li>14. Transferred Cost</li> <li>15. Capitalized Cost</li> </ol>

## CIP Account Dashboard

The CIP Account dashboard displays capitalizable costs by the construction-in-process account. You can use this dashboard to reconcile costs with the general ledger.

The dashboard uses the Project Costing - Assets Real Time subject area.

The dashboard consists of the CIP Account Analysis.

### Key Insights

The dashboard answers the following business questions:

- Do the capitalizable costs in Oracle Project Costing reconcile with the account balances in the general ledger?
- What are the CIP assets assigned to a project?
- What's the total cost of the CIP assets?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.



FAQ	Answer
How do I find this dashboard?	Report and Analytics pane - Shared Folders - Projects - Project Financial Sample Reports
Who uses this dashboard?	Project Accountant
When do I use this dashboard?	When you need to view the details of the construction-in-process assets.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View all project costs charged to a CIP account.</li> <li>• Reconcile CIP balances with the general ledger.</li> <li>• Investigate discrepancies within a CIP account.</li> <li>• Provide supporting documentation of CIP accounts to internal and external auditors.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Expenditure Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:   <code>SELECT MIN("Expenditure Item"."Expenditure Business Unit Name")                      FROM "Project Costing - Assets Real Time" FETCH FIRST 65001 ROWS ONLY</code> </li> </ul>
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
CIP Account	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
CIP Company	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
CIP Cost Center	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
CIP Natural Account	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>

Column	Type	Rules
Accounting Period	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection SQL:                      SELECT MAX("Projects Calendar"."Project Period")FROM "Project Costing - Assets Real Time" FETCH FIRST 65001 ROWS ONLY</li> </ul>

The following table lists the views in the CIP Account Analysis.

View	Displayed Information
View Name	CIP Account Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>CIP Balancing Segment</li> <li>CIP Cost Center</li> <li>CIP Natural Account</li> <li>CIP Account</li> <li>Legal Entity</li> <li>Project Name</li> <li>Project Number</li> <li>Task Number</li> <li>Task Name</li> <li>Transaction Number</li> <li>Transaction Date</li> <li>Cost Distribution Line</li> <li>Asset Number</li> <li>Currency</li> <li>Cost</li> </ol>

## Project Costing - Assets Real Time Measures

This topic provides an overview of the measures available in the Project Costing - Assets Real Time subject area. The measures are populated when accounting currency is set as the preferred currency in Oracle Transactional Business Intelligence.

### Cost Distribution Line Measures

The following measures appear in the ledger currency. Similar measures are available for the transaction currency.

Measure	Description
Cost	Raw cost if raw cost is capitalized. Total burdened cost if burdened cost is capitalized.
Raw Cost	Raw cost of the cost distribution.
Burden Cost	Burden cost of the cost distribution.
Noncapitalizable Cost	Raw cost if the expenditure item is noncapitalizable and raw cost is capitalized. Total burdened cost if the expenditure item is noncapitalizable and burdened cost is capitalized.
Capitalizable Cost	Raw cost if the expenditure item is capitalizable and raw cost is capitalized. Total burdened cost if the expenditure item is capitalizable and burdened cost is capitalized.
Common Capitalizable Cost	Capitalizable cost that's charged to a task or project where the asset grouping level type is Common Costs.
Ungrouped Capitalizable Cost	Capitalizable cost that's not grouped into an asset line. The total noncapitalized or CIP amount of a cost distribution line is the sum of the cost distribution Ungrouped Capitalizable Cost and the asset line Grouped CIP Cost.

## Asset Line Measures

The following measures appear in the ledger currency. Measures are available for both rounded and unrounded costs. The rounded amounts are rounded to 2 decimal places.

Measure	Description
Original Asset Cost	Cost of the asset line before it's split.
Grouped Cost	Current cost of the asset line after it's split. This measure includes CIP and capitalized costs.
Grouped CIP Cost	Current cost of the asset line that's not capitalized in Oracle Assets. This measure includes amounts that are transferred to Oracle Assets but aren't capitalized. The total CIP amount of a cost distribution line is the sum of the cost distribution Ungrouped Capitalizable Cost and the asset line Grouped CIP Cost.
Unassigned CIP Cost	Current cost of a common cost asset line that's not allocated to an asset.
Assigned CIP Cost	Current cost of the asset line that's assigned to an asset but not transferred to Oracle Assets.
Transferred CIP Cost	Current cost of the asset line that's transferred to Oracle Assets but not capitalized.
Rejected CIP Cost	Current cost of the asset line that was transferred to Oracle Assets but rejected.
Capitalized Cost	Current cost of the asset line that's transferred and capitalized in Oracle Assets.

Measure	Description

## Project Billing

### Invoices by Status Dashboard

The Invoices by Status dashboard displays invoices for the selected billing type, accounting period, and invoice status. Results are ordered by invoice date, contract number, and invoice number.

The dashboard uses the Project Billing - Invoices Real Time subject area.

The dashboard consists of the Invoices by Status analysis. You can drill down to the Invoice by Invoice Lines and Invoiced Transactions analyses from the Invoices by Status analysis.

#### Key Insights

This dashboard answers the following business questions:

- Which invoices need attention?
- What are the invoice line details for a particular invoice?
- Which transactions are included in the invoice?

#### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Billing Specialist</li> </ul>
When do I use this dashboard?	When there is an invoice that needs attention.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View invoices in this dashboard by:                             <ul style="list-style-type: none"> <li>○ Accounting Period</li> <li>○ Billing Type</li> <li>○ Invoice Status</li> </ul> </li> </ul>

FAQ	Answer
	<ul style="list-style-type: none"> <li>• Drill down to the:                             <ul style="list-style-type: none"> <li>○ Project Billing - Invoice Lines analysis using the Invoice Amount column.</li> <li>○ Project Billing - Invoiced Transactions analysis using the Invoice Amount column.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Contract Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Billing Type	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Accounting Period	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Values limited by All Prompts</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Invoice Status	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Values limited by All Prompts</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>

The following table lists the views in the Invoices by Status analysis.

View	Displayed Information
View Name	Invoices by Status
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Contract Business Unit</li> <li>2. Invoice Date</li> <li>3. Contract Number</li> <li>4. Invoice Number</li> </ol>

View	Displayed Information
	<ol style="list-style-type: none"> <li>5. Invoice Status</li> <li>6. Oracle Receivables Invoice Number</li> <li>7. Bill-to Customer</li> <li>8. Invoice Type</li> <li>9. Credit Invoice Number</li> <li>10. Invoice Amount</li> <li>11. Currency code</li> </ol>

## Project Billing Events Dashboard

The Project Billing Events dashboard displays the project contract billing events at an individual transaction level.

The dashboard uses the Project Billing - Event Real Time subject area.

The dashboard consists of the Project Billing Events analysis and you can drill down to the following analyses from the Project Billing Events analysis.

- Project Billing - Invoiced Transactions Analysis
- Project Revenue - Recognized Transactions

### Key Insights

This dashboard answers the following business questions:

- Which are the billing events for a project or contract and contract line?
- Which billing events are missing an event completion date?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to know the details of the billing events for a project or contract.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the billing event details for different invoice and revenue statuses.</li> <li>• View the billing details based on the billing event completion date.</li> <li>• Drill down to the Project Billing - Invoiced Transactions Analysis using the Invoiced Amount column.</li> </ul>

FAQ	Answer
	<ul style="list-style-type: none"> <li>Drill down to the Project Revenue - Recognized Transactions Analysis using the Recognized Amount column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Event Usage	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Default selection: Custom Values</li> </ul>
Invoice Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Revenue Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Completion Date On or Before	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Default selection SQL Results:                      SELECT MAX("Event Details"."Completion Date") FROM "Project Billing - Event Real Time"</li> </ul>

The following table lists the views in the Project Billing Events Analysis.

View	Displayed Information
View Name	Project Billing Events Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Contract Number</li> <li>Contract Line Number</li> <li>Project Number</li> <li>Task Number</li> </ol>

View	Displayed Information
	<ol style="list-style-type: none"> <li>5. Use for Invoices</li> <li>6. Use for Revenue</li> <li>7. Revenue Status</li> <li>8. Event Type</li> <li>9. Event Completion Date</li> <li>10. Event Amount</li> <li>11. Contract Currency</li> <li>12. Invoiced Amount</li> <li>13. Unbilled Amount</li> <li>14. Recognized Amount</li> <li>15. Unrecognized Amount</li> </ol>

## Project Contracts

### Project Contract List Dashboard

The Project Contract List dashboard displays project contracts and contract status for a business unit grouped by customer.

The dashboard uses the Project Billing - Funding Real Time, Project Billing - Invoices Real Time, and Project Billing - Revenue Real Time subject areas.

The dashboard consists of the Project Contract List analysis and you can drill down to the Project Contract Lines from the Project Contract List analysis.

#### Key Insights

This dashboard answers the following business questions:

- Which project contracts are active for a business unit?
- Which projects are linked to these contracts?
- What is the total amount of consumed and remaining contract funds?
- Who are the contracted customers for a business unit?

#### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Contract Administrator</li> <li>• Grants Accountant</li> </ul>



FAQ	Answer
	<ul style="list-style-type: none"> <li>Project Accountant</li> <li>Project Billing Specialist</li> <li>Project Team Member</li> </ul>
When do I use this dashboard?	When you need to view the transactions that contribute to contract funds consumption and the contract line amounts that are invoiced and recognized for revenue.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>View contracts in this analysis by:                             <ul style="list-style-type: none"> <li>Contract Business Unit</li> <li>Contract Status</li> </ul> </li> <li>Drill down to the Project Contract Lines analysis using the Contract Number column.</li> </ul>
What type of report is dashboard?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Contract Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Default selection SQL:  <code>SELECT MIN("- Contract Business Unit"."Contract Business Unit Name")                      FROM "Project Billing - Funding Real Time"</code> </li> </ul>
Contract Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Default selection specific value: ACTIVE</li> </ul>

The following table lists the views in the Project Contracts analysis.

View	Displayed Information
View Name	Project Contracts
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Contract Customer Account Name</li> <li>Contract Business Unit</li> <li>Contract Status</li> <li>Contract Number</li> </ol>

View	Displayed Information
	<ol style="list-style-type: none"> <li>5. Contract Start Date</li> <li>6. Contract End Date</li> <li>7. Project Number</li> <li>8. Contract Header Currency Code</li> <li>9. Contract Amount in Contract Currency</li> <li>10. Revenue in Contract Currency</li> <li>11. Revenue Amount Remaining</li> <li>12. Invoiced Amount in Contract Currency</li> <li>13. Contracts Funds Available for Invoicing</li> </ol>

*Related Topics*

- [Project List Dashboard](#)

## Project Costs

### Actual Cost Analysis by Resource Type Dashboard

The Actual Cost Analysis by Resource Type dashboard displays the budget and actual costs for projects for a particular resource type.

For example, the dashboard displays the actual and budget costs for various resource types such as resource, job name, event type, expenditure type, and item name.

The dashboard uses the Projects - Cross Subject Area Analysis - Real Time subject area.

The dashboard consists of the Actual Cost Analysis by Resource Type analysis.

#### Key Insights

This dashboard answers the following business question:

- What are the budget and actual costs for projects for selected resource type?

#### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financial Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to view the variance between the actual and budget costs for projects for a particular resource type.

FAQ	Answer
What can I do with this dashboard?	You can drill down to the Actual Cost Analysis by Resource Type Drill in analysis using the Actual Cost column.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Organization	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Required</li> <li>Select multiple values enabled</li> <li>Default Selection: SQL Results</li> </ul> <p>SELECT "- Business Unit"."Business Unit Name" FROM "Projects - Cross Subject Area Analysis - Real Time" FETCH FIRST 1 ROWS ONLY</p>
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Required</li> <li>Select multiple values enabled</li> <li>Default Selection: SQL Results</li> </ul> <p>SELECT MIN("Project"."Project Name" )FROM "Projects - Cross Subject Area Analysis - Real Time" FETCH FIRST 65001 ROWS ONLY</p>

The following table lists the views in the Actual Cost Analysis by Resource Type analysis.

View	Displayed Information
View Name	Actual Cost Analysis by Resource Type
View Sections	<ul style="list-style-type: none"> <li>Graph</li> <li>Table</li> <li>Resource Type Column Selector</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Budget Cost</li> <li>Actual Cost</li> <li>Variance</li> <li>Resource Type</li> </ol>

## Project Cost by Transaction Source Dashboard

The Project Cost by Transaction Source dashboard displays project cost transactions grouped by transaction source.

The dashboard uses the Project Costing - Actual Costs Real Time subject area.

The dashboard consists of the Project Cost by Transaction Source analysis and you can drill down to the Project Cost Transaction Source Details analysis from the Project Cost by Transaction Source analysis.

### Key Insights

This dashboard answers the following business question:

- How much does each transaction source contribute to project costs?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Accountant</li> </ul>
When do I use this dashboard?	When you need to determine the contribution of each transaction source to the project cost.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View project cost transactions by:                             <ul style="list-style-type: none"> <li>○ Expenditure Category</li> <li>○ Expenditure Item Dates</li> <li>○ Project Business Unit</li> <li>○ Project Name</li> <li>○ Transaction Source</li> </ul> </li> <li>• Drill down to the Project Cost by Transaction Source Details analysis using the Cost column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Transaction Source	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Expenditure Category	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Expenditure Item Date	Dashboard prompt	Is between calendar

The following table lists the views in the Project Cost by Transaction Source analysis.

View	Displayed Information
View Name	Project Cost by Transaction Source
View Type	Pivot table
Pivot Column	Transaction Source
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Business Unit</li> <li>Project Name</li> <li>Project Currency</li> <li>Cost</li> </ol>

## Project Cost Account Reconciliation Dashboard

The Project Cost Account Reconciliation dashboard displays the expenditure items that are posted to the selected GL accounts. This dashboard helps to reconcile account balance discrepancies between Oracle General Ledger and Oracle Project Costing.

The dashboard uses the Project Costing - Actual Costs Real Time subject area.

The dashboard consists of the Project Cost Account Reconciliation analysis.

## Key Insights

This dashboard answers the following business question:

- How can I view project cost reconciliation with GL accounts and investigate reconciliation issues?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Accountant</li> </ul>
When do I use this dashboard?	When account balance discrepancies exist between General Ledger and Project Costing.
What can I do with this dashboard?	<p>You can view specific or financially material transactions by:</p> <ul style="list-style-type: none"> <li>• Account</li> <li>• Accounting Class</li> <li>• Accounting Period</li> <li>• Event Class</li> <li>• Ledger Name</li> <li>• Project Number</li> <li>• Range of Debit Amount</li> <li>• Range of Credit Amount</li> <li>• Task Number</li> <li>• Transaction Number</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Ledger Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Default selection SQL:                      SELECT MIN("Ledger"."Ledger Name")                      FROM "Project Costing - Actual Costs Real Time"</li> </ul>
Accounting Period	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Required</li> <li>Values limited by Ledger Name</li> </ul>
Account	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by Ledger Name</li> </ul>
Accounting Class	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by Ledger Name</li> </ul>
Event Class	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by Ledger Name</li> </ul>
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by Ledger Name</li> </ul>
Task Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by Project Number</li> </ul>
Transaction Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by Task Number</li> </ul>
Debit Amount	Dashboard prompt	Is between text field
Credit Amount	Dashboard prompt	Is between text field

The following table lists the views in the Project Cost Account Reconciliation analysis.

View	Displayed Information
View Name	Project Cost Account Reconciliation
View Sections	None

View	Displayed Information
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Ledger</li> <li>2. Accounting Period</li> <li>3. Account</li> <li>4. Event Class</li> <li>5. Accounting Class</li> <li>6. Project Number</li> <li>7. Task Number</li> <li>8. Transaction Number</li> <li>9. Distribution Line Number</li> <li>10. Ledger Currency</li> <li>11. Debit Amount</li> <li>12. Credit Amount</li> </ol>

## Project Definition

### Project List Dashboard

The Project List dashboard displays the projects for a business unit and organization.

The dashboard uses the Project Control - Budgets Real Time subject area.

The dashboard consists of the Project List analysis.

#### Key Insights

This dashboard answers the following business questions:

- Which projects are under a business unit and what are the statuses of these projects?
- What are the associated tasks for a project?

#### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Administrator
When do I use this dashboard?	When you need to review projects under a business unit and tasks for a project.
What can I do with this dashboard?	You can view projects and project statuses by:



FAQ	Answer
	<ul style="list-style-type: none"> <li>Project Business Unit</li> <li>Project Organization</li> <li>Project Status</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project Organization	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Values limited by Project Business Unit</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>

The following table lists the views in the Project List analysis.

View	Displayed Information
View Name	Project List
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Number</li> <li>Project Name</li> <li>Project Status</li> <li>Project Manager</li> <li>Project Type</li> <li>Project Start Date</li> <li>Project Finish Date</li> </ol>

## Project Task List Dashboard

The Project Task List dashboard displays the list of tasks for projects.

The dashboard uses the Project Control - Budgets Real Time subject area.

The dashboard consists of the Project Task List analysis.

### Key Insights

This dashboard answers the following business question:

- Which tasks are associated to a project?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Project List
Who uses this dashboard?	Project Administrator
When do I use this dashboard?	When you need to review the tasks for a project.
What can I do with this dashboard?	Review project tasks and task dates.
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Project Organization	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Values limited by Project Business Unit</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>

Column	Type	Rules
Project Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>

The following table lists the views in the Project Task List analysis.

View	Displayed Information
View Name	Project Task List
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Number</li> <li>Task Number</li> <li>Task Name</li> <li>Task Description</li> <li>Planned Start Date</li> <li>Planned Finish Date</li> <li>Actual Start Date</li> <li>Actual Finish Date</li> <li>Estimated Finish Date</li> </ol>

*Related Topics*

- [Project List Dashboard](#)

## Project Performance

### Budget Versus Actual Cost Comparison Dashboard

The Budget vs Actual Cost Comparison dashboard displays the comparison of budget and actual costs to analyze variances. Results are grouped by business unit and currency.

The dashboard uses the Project Costing - Actual Costs Real Time and Project Control - Budgets Real Time subject areas.

The dashboard consists of the Budget vs Actual Cost Comparison analysis.

## Key Insights

This dashboard answers the following business question:

- How do my actual costs compare to my budget costs?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to compare the budget and actual costs of a project.
What can I do with this dashboard?	You can view the list of projects by: <ul style="list-style-type: none"> <li>• Project Business Unit</li> <li>• Project Manager</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                      SELECT MIN("Project"."Project Business Unit") FROM "Project Costing - Actual Costs Real Time"</li> </ul>
Project Manager	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Values limited by Project Business Unit</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>

The following table lists the views in the Budget vs Actual Cost Comparison by Business Unit analysis.

View	Displayed Information
View Name	Budget vs Actual Cost Comparison by Business Unit
View Sections	<ul style="list-style-type: none"> <li>Project Business Unit</li> <li>Currency</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Manager</li> <li>Project Number</li> <li>Budget Cost</li> <li>Actual Cost</li> <li>Variance</li> </ol>

## Project Income Statement Dashboard

The Project Income Statement dashboard displays the comparison of revenue and costs to calculate the net income or loss for a project. The result groups revenue by revenue category and expenses by expenditure category.

The dashboard uses the Project Billing - Revenue Real Time and Project Costing - Actual Costs Real Time subject areas.

The dashboard consists of the Project Income Statement analysis.

### Key Insights

This dashboard answers the following business questions:

- Is my project profitable?
- Can I view my project expense and revenue grouped by expense and revenue categories?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to determine if a project is making profit or incurring loss.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>Review project expenses and revenue by expense and revenue categories</li> <li>Gain insight into the consolidated financial picture of your project.</li> <li>View income statements by project number</li> </ul>

FAQ	Answer
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Number	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Required</li> <li>Default selection SQL:                      SELECT MIN("Project"."Project Number")                      FROM "Project Billing - Revenue Real                      Time"</li> </ul>

The following table lists the views in the Project Income Statement analysis.

View	Displayed Information
View Name	Project Income Statement
View Sections	<ul style="list-style-type: none"> <li>Revenue and Expense</li> <li>Net Income</li> <li>Currency Note</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Revenue and Expense                             <ol style="list-style-type: none"> <li>Category</li> <li>Amount</li> </ol> </li> <li>Net Income                             <ol style="list-style-type: none"> <li>Net Income/Loss</li> </ol> </li> <li>Currency Note                             <ol style="list-style-type: none"> <li>Currency Type</li> </ol> </li> </ol>

### Related Topics

- [Budget Versus Actual Cost Comparison Dashboard](#)

# Project Revenue

## Revenue by Contract Dashboard

The Revenue by Contract dashboard displays actual revenue for contracts for a specified billing type, contract business unit, and accounting year ordered by contract number.

The dashboard uses the Project Billing - Revenue Real Time subject area.

The dashboard consists of the Revenue by Contract analysis and you can drill down to the following analyses from the Revenue by Contract analysis.

- Project Revenue - Recognized Transactions
- Project Revenue - Contract Lines

### Key Insights

This dashboard answers the following business questions:

- Which contracts have actual revenue in the current accounting year?
- Which contracts have the lowest actual revenue in the current accounting period?
- What is the actual revenue trend for accounting periods in the selected accounting year?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Accountant</li> <li>• Project Manager</li> <li>• Project Team Member</li> </ul>
When do I use this dashboard?	When you need to view contracts listed by their actual revenue values.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View contracts in this analysis by:                             <ul style="list-style-type: none"> <li>○ Accounting Year</li> <li>○ Billing Type</li> <li>○ Business Unit</li> </ul> </li> </ul>

FAQ	Answer
	<ul style="list-style-type: none"> <li>• Drill down to the:                             <ul style="list-style-type: none"> <li>○ Project Revenue - Recognized Transactions analysis using the Revenue in Ledger Currency column.</li> <li>○ Project Revenue - Contract Lines analysis using the Revenue in Ledger Currency column.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Business Unit	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Accounting Year	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection server variable: NQ_SESSION.CURRENT_FSCL_YEAR</li> </ul>
Billing Type	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>

The following table lists the views in the Revenue by Contract analysis.

View	Displayed Information
View Name	Revenue by Contract
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Contract Business Unit</li> <li>2. Billing Type</li> <li>3. Contract Number</li> <li>4. Contract Name</li> <li>5. Contract Status</li> <li>6. Contract Start Date</li> </ol>



View	Displayed Information
	<ol style="list-style-type: none"> <li>7. Contract End Date</li> <li>8. Last Recognized Date</li> <li>9. Revenue in Ledger Currency</li> <li>10. Ledger Currency</li> <li>11. Accounting Period</li> <li>12. Accounting Year</li> </ol>

*Related Topics*

- [Invoices by Status Dashboard](#)

## Grants Management

### Award List Dashboard

The Award List dashboard displays the list of open awards ordered by contract statuses. This dashboard also lists the awards funded by federal sponsors and awards enabled for cost sharing.

The dashboard uses the Projects - Grants Management - Award Funding Real Time subject area.

The dashboard consists of the Award List analysis and you can drill down to Award Project Funding Details from the Award List analysis.

### Key Insights

This dashboard answers the following business questions:

- Which awards are currently active?
- Which awards are past their end dates but haven't been closed?
- What is the allocated funding amount for each project of an active award?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Grants Administrator</li> <li>• Principal Investigator</li> </ul>
When do I use this dashboard?	When you need to review award statuses and project funding details for active awards.
What can I do with this dashboard?	You can:

FAQ	Answer
	<ul style="list-style-type: none"> <li>• View awards in this analysis by:                             <ul style="list-style-type: none"> <li>○ Award Status</li> <li>○ Award Organization</li> <li>○ Cost Sharing</li> <li>○ Federal Sponsor</li> </ul> </li> <li>• Drill down into the Award Project Funding Details analysis using the Award Number column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Award Status	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection specific values: Active, Under amendment, Expired</li> </ul>
Award Organization	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Values limited by Award Status</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Federal Sponsor	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                             <pre>SELECT "Primary Sponsor"."Federal Sponsor" FROM "Projects - Grants Management - Award Funding Real Time" WHERE "Primary Sponsor"."Federal Sponsor"!='NULL' FETCH FIRST 65001 ROWS ONLY</pre> </li> </ul>
Cost Sharing	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                             <pre>SELECT "Award"."Cost Shared by Internal Source" FROM "Projects - Grants Management - Award Funding Real Time" WHERE "Award"."Cost Shared by Internal</pre> </li> </ul>

Column	Type	Rules
		Source!='NULL' FETCH FIRST 65001 ROWS ONLY

The following table lists the views for the Award List analysis.

View	Displayed Information
View Name	Award List
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Award Number</li> <li>2. Sponsor Award Number</li> <li>3. Principal Investigator</li> <li>4. Award Status</li> <li>5. Award Owning Organization</li> <li>6. Sponsor Name</li> <li>7. Federal Sponsor</li> <li>8. Award Start Date</li> <li>9. Award End Date</li> <li>10. Cost Sharing</li> <li>11. Allocated Funding Amount</li> <li>12. Unallocated Funding Amount</li> <li>13. Total Funding Amount</li> <li>14. Award Ledger Currency</li> </ol>

## Award Administrator Dashboard

Grants administrators can review award summary and award financial analyses on the Award Administrator dashboard. You can modify the set of reporting and analysis object to meet your requirements.

The dashboard uses the Projects - Grants Management - Award Funding Real Time and Projects - Cross Subject Area Analysis Real Time subject areas.

The dashboard consists of the award summary and award financials analyses.

### Key Insights

This dashboard answers the following business questions:

- Which awards are currently active and which have expired?
- Which awards are past their end dates, but still open?
- What's the allocated and unallocated funding amount for each project of an active award?
- What's the total cost of all awards?
- How many overspent or underspent projects exist?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Dashboards
Who uses this dashboard?	Grants Administrator
When do I use this dashboard?	When you need to review award statuses and project funding details for an award project.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>Review award statuses to understand which awards are currently active and which have expired or nearing expiry.</li> <li>View the total unallocated and unbudgeted funding amount for awards.</li> <li>Gain insight into the total cost and percentage of cost budget spent on award projects.</li> <li>Review overspent and underspent award project budgets.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Accounting Year	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Values limited by All Prompts</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Fiscal Quarter	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Values limited by All Prompts</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Accounting Period Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Award Business Unit Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Default selection: All values</li> </ul>
Award Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Award Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Award Owning Organization	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Principal Investigator	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Sponsor	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Keyword Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>

The following table lists the views for the Award Administrator analysis.

View	Displayed Information
View Name	Award Administrator
View Sections	<ul style="list-style-type: none"> <li>Award Summary</li> <li>Award Financials</li> </ul>

View	Displayed Information
Graphs and Measures	<ol style="list-style-type: none"> <li>1. Award Summary Measures and Graphs                             <ul style="list-style-type: none"> <li>○ Award Started Within 60 Days</li> <li>○ Draft Awards in Next 7 Days</li> <li>○ Award Expiring</li> <li>○ Award Certification Expiring</li> <li>○ Unallocated Funding Amount</li> <li>○ Unbudgeted Amount</li> <li>○ Active Award Contribution Report</li> <li>○ Active Award Total Unallocated Funding</li> <li>○ Active Award Trend</li> <li>○ Active Award Direct Vs Indirect Amount Comparison</li> </ul> </li> <li>2. Award Financials Measures and Graphs                             <ul style="list-style-type: none"> <li>○ Project Cost</li> <li>○ Percentage Cost Budget Spent</li> <li>○ Overspent Projects</li> <li>○ Underspent Projects</li> <li>○ Expenditure by Sponsor and Expenditure Category</li> <li>○ Cost Trend</li> <li>○ Top 10 Active Award by Budget</li> <li>○ Top 10 Overspent Projects</li> <li>○ Indirect Cost Recovery</li> </ul> </li> </ol>

## Change Orders

### Change Orders Summary Dashboard

The Change Orders Summary dashboard displays the summary of change orders that are pending for impact assessments, reviews, approvals, and implementations, grouped by project.

The dashboard uses the Project Management - Change Management Real Time subject area.

The dashboard consists of Change Order Summary Report and you can drill down to the following analyses from the Change Order Summary Report.

- Change Order Details by Pending Approval Report
- Change Order Details by Pending Impact Assessment Report
- Change Order Details by Pending Implementation Report

- Change Order Details by Pending Review Report
- Change Order Details Report
- Change Orders by Participant Status Report

## Key Insights

This dashboard answers the following business questions:

- What's the number of pending change orders grouped by various stages?
- What's the total number of pending change orders?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Change Order Owner</li> </ul>
When do I use this dashboard?	When you want to get a summary of pending change orders for your projects or change orders you own.
What can I do with this dashboard?	<p>You can:</p> <ul style="list-style-type: none"> <li>• View change orders by project name.</li> <li>• Drill down to the:                             <ul style="list-style-type: none"> <li>○ Change Order Details analysis from the Project Name column.</li> <li>○ Change Orders by Participant Status analysis from the Owner column of the Change Order Details analysis.</li> <li>○ Change Order Details by Pending Impact Assessment from the Pending Impact Assessment column.</li> <li>○ Change Order Details by Pending Approval from the Pending Approval column.</li> <li>○ Change Order Details by Pending Implementation from the Pending Implementation column.</li> <li>○ Change Order Details by Pending Review from the Pending Review column.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Priority	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Reason	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>

The following table lists the views in the Change Orders Summary analysis.

View	Displayed Information
View Name	Change Orders Summary
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project                         <ol style="list-style-type: none"> <li>a. Project Name</li> </ol> </li> <li>2. Change Orders                         <ol style="list-style-type: none"> <li>a. Number of Pending Change Orders</li> <li>3. Number of Pending Change Orders                                 <ol style="list-style-type: none"> <li>a. Pending Impact Assessment</li> <li>b. Pending Review</li> <li>c. Pending Approval</li> <li>d. Pending Implementation</li> </ol> </li> </ol> </li> </ol>

## Change Orders by Reason Dashboard

The Change Orders by Reason dashboard displays the change orders grouped by reason in form of pivot table and pie chart.

The dashboard uses the Project Management - Change Management Real Time subject area.



The dashboard consists of Change Order by Reason Report and you can drill down to the following analyses from the Change Orders by Reason Report.

- Change Orders by Participant Status Report
- Change Order Details Report

## Key Insights

This dashboard answers the following business questions:

- What are the reasons for change orders?
- What's the count of change orders for a given reason?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Change Order Owner</li> </ul>
When do I use this dashboard?	When you want to know the reasons of the change orders for your projects or change orders that you own.
What can I do with this dashboard?	You can <ul style="list-style-type: none"> <li>• View change orders by project name.</li> <li>• Drill down to the view Change Order Details and Change Order by Participant Status analysis.                             <ul style="list-style-type: none"> <li>○ Change Order Details analysis by using the Reason Name column.</li> <li>○ Change Orders by Participant Status analysis by using the Owner column in the Change Order Details analysis.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Values limited by All Prompts</li> </ul>

Column	Type	Rules
Change Order Priority	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> <li>Default selection SQL:                             <pre>SELECT "Change Order Status"."Change Order Status Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Status"."Change Order Status Code" IN ('IN_PROGRESS', 'APPROVED') FETCH FIRST 65001 ROWS ONLY</pre> </li> </ul>
Change Order Stage	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> <li>Default selection SQL:                             <pre>SELECT "Change Order Stage"."Change Order Stage Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Stage"."Change Order Stage Code" IN ('APPROVAL','IMPACT_ANALYSIS','IMPLEMENTATION') FETCH FIRST 65001 ROWS ONLY</pre> </li> </ul>

The following table lists the views in the Change Order by Reason analysis.

View	Displayed Information
View Name	Change Orders By Reason
View Sections	<ul style="list-style-type: none"> <li>Pivot table</li> <li>Graph</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Name</li> <li>Change Order Reason Name</li> </ol>

## Change Order Details Dashboard

The Change Order Details dashboard displays the change order details and impact assessments by project.

The dashboard uses the Project Management - Change Management Real Time subject area.

The dashboard consists of Change Order Details Report and you can drill down to the following analysis from the Change Order Details Report.

- Change Orders by Participant Status Report

### Key Insights

This dashboard answers the following business questions:

- What's the effort required to process the change order?
- What's the estimated cost and revenue for the change order?
- What's the current stage and status of the change order?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Change Order Owner</li> </ul>
When do I use this dashboard?	When you want to know the details and impact assessments of the change orders for your projects or change orders you own.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View change orders by:                             <ul style="list-style-type: none"> <li>○ Project Name</li> <li>○ Change Order Priority</li> <li>○ Change Order Owner</li> </ul> </li> <li>• View total number of change orders for a project.</li> <li>• Drill down to the Change Order by Participant Status analysis using the Change Order Owner column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Priority	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Reason	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> <li>Default selection SQL:</li> </ul> <pre>SELECT "Change Order Status"."Change Order Status Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Status"."Change Order Status Code" IN ('IN_PROGRESS', 'APPROVED') FETCH FIRST 65001 ROWS ONLY</pre>
Change Order Stage	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> <li>Default selection SQL:</li> </ul> <pre>SELECT "Change Order Stage"."Change Order Stage Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Stage"."Change Order Stage Code" IN ('APPROVAL', 'IMPACT_ANALYSIS', 'IMPLEMENTATION') FETCH FIRST 65001 ROWS ONLY</pre>

The following table lists the views in the Change Order Details analysis.

View	Displayed Information
View Name	Change Order Details
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project Name</li> <li>2. Change Order Owner</li> <li>3. Change Order Priority</li> <li>4. Change Order Name</li> <li>5. Change Order Reason</li> <li>6. Change Order Status</li> <li>7. Change Order Stage</li> <li>8. Currency</li> <li>9. Effort in Hours</li> <li>10. Estimated Cost</li> <li>11. Estimated Revenue</li> <li>12. Contract Amount</li> </ol>

## Change Orders by Participant Status Dashboard

The Change Orders by Participant Status dashboard displays the change order details by participant statuses.

The dashboard uses the Project Management - Change Management Real Time subject area.

The dashboard consists of Change Orders by Participant Status Report.

### Key Insights

This dashboard answers the following business questions:

- What's the current stage and status of the change order?
- What are the various participant statuses for the change order?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Change Order Owner</li> <li>• Change Order Participant</li> </ul>
When do I use this dashboard?	When you want to review the details of pending change orders for:

FAQ	Answer
	<ul style="list-style-type: none"> <li>Your projects or the change orders that you own.</li> <li>Which you are a participant.</li> </ul>
What can I do with this dashboard?	You can view the participant details by: <ul style="list-style-type: none"> <li>Project Name</li> <li>Change Order Priority</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Priority	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Reason	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Change Order Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> <li>Default selection SQL:</li> </ul> <pre>SELECT "Change Order Status"."Change Order Status Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Status"."Change Order Status Code" IN ('IN_PROGRESS', 'APPROVED') FETCH FIRST 65001 ROWS ONLY</pre>
Change Order Stage	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> <li>Default selection SQL:                      SELECT "Change Order Stage"."Change Order Stage Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Stage"."Change Order Stage Code" IN ('APPROVAL','IMPACT_ANALYSIS','IMPLEMENTATION')                      FETCH FIRST 65001 ROWS ONLY</li> </ul>
Participant	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Change Orders by Participant Status analysis.

View	Displayed Information
View Name	Change Orders By Participant Status
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Name</li> <li>Change Order Owner</li> <li>Change Order Priority</li> <li>Change Order Name</li> <li>Change Order Status</li> <li>Change Order Stage</li> <li>Participant Name</li> <li>Assessor Status</li> <li>Reviewer Status</li> <li>Approver Status</li> <li>Implementor Status</li> </ol>

## Project Hierarchy

### EPS Element by Delegate Dashboard

The EPS Element by Delegate dashboard displays the projects grouped in an EPS element. You can also view the project start and finish dates, and project managers for such projects.

The dashboard uses the Project Management-Project Hierarchy Real Time subject area.

The dashboard consists of EPS Element by Delegate Analysis.

## Key Insights

The dashboard answers the following business questions:

- Which projects are under an EPS element?
- Who is the Delegate assigned to the EPS element?
- What are the projects assigned to a project manager?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Application Administrator and Project Executive
When do I use this dashboard?	When you need to review which projects are grouped under an EPS element, their start and finish dates, and the Project Managers of individual projects.
What can I do with this dashboard?	Review the labor resources of a project.
What type of dashboard is this?	Oracle Transactional Business Intelligence.

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Delegate Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                      SELECT "Project Resource Management - Resource Management Real Time"."Project"."Project Name" s_1                      FROM "Project Resource Management - Resource Management Real Time" WHERE                      (("Project Resource Request"."Total Requests" &gt;= 0) OR ("Project Resource Request"."Total Requests" IS NULL))                      ORDER BY 1 ASC NULLS LAST FETCH                      FIRST 75001 ROWS</li> </ul>



Column	Type	Rules
Project Manager	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple views enabled</li> <li>Default selection SQL:                       SELECT "Project Resource Management - Resource Management Real Time"."Project"."Primary Project Manager" s_1 FROM "Project Resource Management - Resource Management Real Time" WHERE (("Project Resource Request"."Total Requests" &gt;= 0) OR ("Project Resource Request"."Total Requests" IS NULL)) ORDER BY 1 ASC NULLS LAST FETCH FIRST 75001 ROWS ONLY</li> </ul>
Project Start Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Is greater than or equal to</li> <li>Default selection SQLSELECT MIN("- Project Start Date"."Project Start Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY</li> </ul>
Project End Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Is less than or equal to</li> <li>Default selection SQL:                       SELECT MAX("- Project End Date"."Project End Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY</li> </ul>

The following table lists the views in the EPS Element by Delegate Analysis.

View	Displayed Information
View Name	EPS Element by Delegate Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Delegate</li> <li>EPS Element Name</li> <li>Project Name</li> <li>Project Manager</li> </ol>

## EPS Element by Owner Dashboard

The EPS Element by Owner dashboard lists the projects overseen by an EPS element owner, the start and end dates for projects, and the total cost incurred by each project.

The dashboard uses the Project Management - Project Hierarchy Real Time subject area.

The dashboard consists of EPS Element by Owner Analysis.

### Key Insights

The dashboard answers the following business questions:

- Who are the direct owners of an EPS element?
- Which projects are active in a specified year?
- Who should I contact for explanation on EPS elements that have measure that are out of tolerance level?
- What's the start date and end date for projects under an EPS element?
- What's the total cost of each project under an EPS element?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Application Administrators</li> <li>• Project Executives</li> </ul>
When do I use this dashboard?	When you want to review: <ul style="list-style-type: none"> <li>• Start and finish dates for projects under an EPS element</li> <li>• Owners of EPS elements</li> <li>• Total cost incurred by each project</li> </ul>
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• Review the total cost for each project under an EPS element</li> <li>• View the owners of EPS elements</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Start Date	Dashboard Prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Is greater than or equal to</li> <li>Default selection SQL:                      SELECT MIN("- Project Start Date"."Project Start Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY</li> </ul>
Project End Date	Dashboard Prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Is less than or equal to</li> <li>Default selection SQL:                      SELECT MAX("- Project End Date"."Project End Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY</li> </ul>

The following table lists the views in the EPS Element by Owner Analysis.

View	Displayed Information
View Name	EPS Element by Owner Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Hierarchy</li> <li>Owner</li> <li>Project</li> <li>Total Cost</li> </ol>

## Project Issues

### Closed Issue Dashboard

The Closed Issue dashboard displays the details of the issues that are closed. The dashboard helps project managers view the issue patterns and improve future performance.

The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of the Closed Issue Analysis Report and you can drill down to the following analyses from the Closed Issue Analysis Report.

- Issue Details Report
- Action Item Details Report

## Key Insights

This dashboard answers the following business questions:

- How were issues resolved?
- What was the actual timeliness for closing issues?
- How were action items related to the issue resolved?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to know the details of the issues closed for your project or for the issues you own.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the closed issues by:                             <ul style="list-style-type: none"> <li>○ Issue Type</li> <li>○ Closed Reason</li> </ul> </li> <li>• Drill down to the:                             <ul style="list-style-type: none"> <li>○ Issue Details analysis using the Count of Issues column.</li> <li>○ Action Item Details analysis using the Action Items column.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Issue Status	Filter	is equal to / is in Closed
Issue Creation Date	Dashboard prompt	<ul style="list-style-type: none"> <li>• Calendar</li> <li>• Default selection SQL:                              SELECT                              CAST(TIMESTAMPADD(SQL_TSI_MONTH,-</li> </ul>

Column	Type	Rules
		{3}, CURRENT_DATE) As Date) from "Project Management - Project Issues Real Time"
Issue Creator	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Issue Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>

The following table lists the views in the Closed Issue Analysis.

View	Displayed Information
View Name	Closed Issue Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Issue Type</li> <li>Closed Reason</li> <li>Issue Resolution</li> <li>Issue Summary</li> <li>Issue Duration</li> <li>Actual Timeliness</li> <li>Action Items</li> <li>Owner</li> <li>Issue Description</li> </ol>

## Detail of Open Issues Dashboard

The Detail of Open Issues dashboard displays the details of open issues.

The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of Detail of Open Issues Report and you can drill down to the following analyses from Detail of Open Issues Report.

- Issue Details Report
- Action Item Details Report

## Key Insights

This dashboard answers the following business questions:

- What are the open issues for a project?
- What is the number of action items for each open issue?
- What is the due date to resolve the issue?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to know the details of open issues.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the open issues sorted by:                             <ul style="list-style-type: none"> <li>○ Project</li> <li>○ Need-by Date</li> </ul> </li> <li>• Drill down to the:                             <ul style="list-style-type: none"> <li>○ Issue Details analysis using the Count of Issues column.</li> <li>○ Action Item Details analysis using the Action Items column.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Issue Status	Filter	Is not equal to / is not in Closed
Project	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>

Column	Type	Rules
Project Manager	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection SQL:                      SELECT "Project"."Primary Project Manager" FROM "Project Management - Project Issues Real Time" FETCH FIRST 65001 ROWS ONLY where "Project"."Primary Project Manager" =VALUEOF(NQ_SESSION.USER)</li> </ul>
Issue Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>

The following table lists the views in the Detail of Open Issues Report.

View	Displayed Information
View Name	Detail of Open Issues Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project</li> <li>Need by</li> <li>Priority</li> <li>Issue Summary</li> <li>Owner</li> <li>Creator</li> <li>Issue Type</li> <li>Action Items</li> </ol>

## Issue Analysis by Project Dashboard

The Issue Analysis by Project dashboard displays the number of issues by the issue types for all your projects. You can also view the issues grouped by project managers or project statuses.

The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of Issue Analysis by Project Report and you can drill down to the following analyses from the Issue Analysis by Project Report.

- Issue Details Report
- Action Item Details Report

## Key Insights

This dashboard answers the following business questions:

- What are the total number of issues for a project?
- What are the total number of issues for each issue type?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to know how many issues are open for each project and their types.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the number of issue types by:                             <ul style="list-style-type: none"> <li>○ Project</li> <li>○ Project Managers</li> <li>○ Project Status</li> <li>○ Project End Date</li> </ul> </li> <li>• Drill down to the Issue Details analysis using the Count of Issues column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Filter	Is not null
Project Manager	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                              SELECT "Project"."Primary Project Manager" FROM "Project Management - Project Issues Real Time" WHERE                         </li> </ul>



Column	Type	Rules
		"Project"."Primary Project Manager" =VALUEOF(NQ_SESSION.USER)
Project Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection SQL:                      SELECT "Project"."Current Project Status Name" FROM "Project Management - Project Issues Real Time" where "Project"."Current Project Status Name" = 'Active'</li> </ul>
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project Finish Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Default selection: None</li> <li>Presentation Variable: PROJ_END_DT</li> </ul>

The following table lists the views for Issue Analysis by Project Report.

View	Displayed Information
View Name	Issue Analysis by Project Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Sort Count</li> <li>Project Name</li> <li>Count of Issues</li> <li>Issue Type</li> </ol>

## Issue Aging Dashboard

The Issue Aging dashboard displays the number of issues grouped by the days they are open, for example, less than a month, more than a month, and so on.

You can also view the number of issues for each issue status. The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of Issue Aging Report and you can drill down to the following analyses from the Issue Aging Report.

- Issue Details Report
- Action Item Details Report

## Key Insights

This dashboard answers the following business question:

- What are the total number of issues by age and status?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to know the number of open issues by their age and status.
What can I do with this dashboard?	You can view the number of issues by age range and take appropriate actions on them.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> <li>• Default selection SQL:                      SELECT "Issue Owner"."Issue Owner"                      FROM "Project Management -                      Project Issues Real Time" where</li> </ul>

Column	Type	Rules
		"Issue Owner"."Issue Owner" =VALUEOF(NQ_SESSION.USER)
Issue Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: SQL Results</li> </ul> <pre>SELECT "Issue Status"."Issue Status" FROM "Project Management - Project Issues Real Time" where "Issue Status"."Issue Status" &lt;&gt; 'Closed' FETCH FIRST 65001 ROWS ONLY</pre> <ul style="list-style-type: none"> <li>Default selection SQL:</li> </ul> <pre>SELECT "Issue Status"."Issue Status" FROM "Project Management - Project Issues Real Time" where "Issue Status"."Issue Status" IN ('New','In progress')</pre>

The following table lists the views in the Issue Aging Report.

View	Displayed Information
View Name	Issue Aging Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Number Of Issues</li> <li>Age</li> <li>Issue Status</li> </ol>

## Issues by Type Dashboard

The Issues by Type dashboard displays the number of issues by issue types.

The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of Issues by Type Report and you can drill down to the following analyses from the Issues by Type Report.

- Action Item Details Report
- Issue Details Report

## Key Insights

This dashboard answers the following business question:

- What are the total number of issues for each issue type?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard ?	Project Manager
When do I use this dashboard ?	When you need to know the number of issues for each issue type.
What can I do with this dashboard ?	You can view the number of issues grouped by issue type, status, priority, and project.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Issue Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> </ul>
Issue Status	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All values</li> <li>• Default selection SQL:                      SELECT "Issue Status"."Issue Status"                      FROM "Project Management - Project                      Issues Real Time" where "Issue                      Status"."Issue Status" IN ('New','In                      progress')</li> </ul>

The following table lists the views in the Issues by Type Report.

View	Displayed Information
View Name	Issues by Type Report
View Sections	<ul style="list-style-type: none"> <li>• Table</li> <li>• Pie Chart</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Issue Priority</li> <li>2. Issue Status</li> <li>3. Type</li> <li>4. Project Name</li> <li>5. Number of Issues</li> </ol>

## My Open Action Items Dashboard

The My Open Action Items dashboard displays the details of the action items that are owned by the user. You can view the action items sorted by their need-by date.

The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of My Open Action Items Report and you can drill down to the following analyses from the My Open Action Items Report.

- Action Item Details Report
- Issues Details Report

### Key Insights

This dashboard answers the following business questions:

- Which action items do I own?
- What are the deadlines to resolve the action items I own?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to know the action items you own and the deadline to resolve the action items.

FAQ	Answer
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>View the actions items details.</li> <li>Drill down to the Issue Details Report using the Issue column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Action Item Status	Filter	is not equal to / is not in Complete
Owner		<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection SQL:                      SELECT "Action Item Owner"."Action Item Owner" FROM "Project Management - Project Issues Real Time" where "Action Item Owner"."Action Item Owner" =VALUEOF(NQ_SESSION.USER)</li> </ul>
Project	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Issue Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>

The following table lists the views in the My Open Action Items analysis.

View	Displayed Information
View Name	My Open Action Items
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Need by</li> <li>Action Item</li> <li>Action Item Description</li> </ol>

View	Displayed Information
	<ol style="list-style-type: none"> <li>4. Project</li> <li>5. Action Item Status</li> <li>6. Issue</li> <li>7. Issue Type</li> <li>8. Issue Priority</li> </ol>

## My Open Issues Dashboard

The My Open Issues dashboard displays the issues that are owned by the user. You can view the issues sorted by their need-by date.

The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of My Open Issues Report and you can drill down to the following analyses from the My Open Issues Report.

- Action Item Details Report
- Issue Details Report

### Key Insights

This dashboard answers the following business questions:

- Which issues do I own?
- What are the total number of action items for each issue I own?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Team Member</li> </ul>
When do I use this dashboard?	When you need to know the issues you own and the deadline to resolve them.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the issue details.</li> <li>• Drill down to the Issue Details Report using the Issue Summary column.</li> <li>• Drill down to the Action Item Details Report using the Action Items column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Issue Status	Filter	is not equal to / is not in Closed
Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> <li>Default selection SQL:                      SELECT "Issue Owner"."Issue Owner"                      FROM "Project Management -                      Project Issues Real Time" where                      "Issue Owner"."Issue Owner"                      =VALUEOF(NQ_SESSION.USER)</li> </ul>
Issue Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>

The following table lists the views in the My Open Issues analysis.

View	Displayed Information
View Name	My Open Issues
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Need by</li> <li>Priority</li> <li>Status</li> <li>Issue Type</li> <li>Issue Summary</li> <li>Project</li> <li>Action Items</li> <li>Issue Description</li> </ol>



## Open Action Items by Project Dashboard

The Open Action Items by Project dashboard displays the details of the open action items grouped by the project.

The dashboard uses the Project Management - Project Issues Real Time subject area.

The dashboard consists of Open Action Items by Project Report and you can drill down to the following analyses from the Open Action Items by Project Report.

- Action Item Details Report
- Issue Details Report

### Key Insights

This dashboard answers the following business questions:

- Which action items are open for my projects?
- Who's the owner of the open action item?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to know the open action items for your project and the deadline to resolve the action items.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the open actions items details.</li> <li>• View the owners for the open action items</li> <li>• Drill down to the Issue Details Report using the Issue Summary column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Action Item Status	Filter	is not equal to / is not in Complete
Project	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Issue Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection: All values</li> </ul>
Project Manager	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection SQL:                      SELECT "Project"."Primary Project Manager" FROM "Project Management - Project Issues Real Time" FETCH FIRST 65001 ROWS ONLY where "Project"."Primary Project Manager" =VALUEOF(NQ_SESSION.USER)</li> </ul>

The following table lists the views in the Open Action Items by Project analysis.

View	Displayed Information
View Name	Open Action Items by Project
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project</li> <li>Need by</li> <li>Issue Priority</li> <li>Action Item Summary</li> <li>Action Item Owner</li> <li>Action Item Status</li> <li>Issue Summary</li> <li>Issue Type</li> </ol>

# Project Management

## Actual Project Labor Margin Dashboard

The Actual Project Labor Margin dashboard displays the actual hours, actual cost, bill amount, margin, and margin percentage for the selected project.

The dashboard uses the Project Management - Planning Real Time subject area.

The dashboard consists of Actual Project Labor Margin Report.

### Key Insights

This dashboard answers the following business questions:

- What are the planned billing amounts for my projects?
- What are the operating margins for my projects?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review the bill amount and margin for your projects.
What can I do with this dashboard?	You can review the following for your projects: <ul style="list-style-type: none"><li>• Actual hours</li><li>• Actual cost</li><li>• Bill amount</li><li>• Margin</li><li>• Margin percentage</li></ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Bill Amount	Filter	Is greater than 0

The following table lists the views in the Actual Project Labor Margin Report.

View	Displayed Information
View Name	Actual Project Labor Margin Report
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project Name</li> <li>2. Hours</li> <li>3. Bill Amount</li> <li>4. Cost</li> <li>5. Margin</li> <li>6. Margin Percentage</li> </ol>

## Baseline Trend Dashboard

The Baseline Trend dashboard displays the baseline trend for project tasks by effort, cost, and dates. You can analyze the incremental progress on the project and better plan for similar projects in future.

The dashboard uses the Project Management - Baseline Versions Real Time subject area.

The dashboard consists of the Baseline Trend Analysis.

### Key Insights

This dashboard answers the following business question:

- How do I compare multiple baselines and view the baseline trend by effort, cost, and schedule?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review the progress of your project and view the baseline trend.

FAQ	Answer
What can I do with this dashboard?	You can drill down to the subtasks using the Top Task Name column.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Default selection: SQL</li> </ul> <pre>SELECT "Project"."Project Name" FROM "Project Management - Baseline Versions Real Time" FETCH FIRST 1 ROWS ONLY ORDER BY "Project"."Project Name"</pre> <ul style="list-style-type: none"> <li>Presentation Variable: PRJ_NAME_PV</li> </ul>
Top Level Task Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list: SQL Results</li> </ul> <pre>SELECT "Task Hierarchy"."Top Level Task Name" FROM "Project Management - Baseline Versions Real Time" WHERE ("Project"."Project Name" IN (@{PRJ_NAME_PV}['@']{ ' }) AND ("Baseline Version Details"."Baseline Name" IS NOT NULL)) FETCH FIRST 65001 ROWS ONLY</pre> <ul style="list-style-type: none"> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Baseline Trend Analysis.

View	Displayed Information
View Name	Baseline Trend Analysis
View Sections	<ul style="list-style-type: none"> <li>Graph</li> <li>Table</li> </ul>
Table Column and Measures	<ul style="list-style-type: none"> <li>Graph view:                             <ol style="list-style-type: none"> <li>X-Axis: Baseline Name</li> <li>Y- Axis: Effort</li> <li>Y- Axis: Cost</li> </ol> </li> </ul>

View	Displayed Information
	<ul style="list-style-type: none"> <li>• Table view:                             <ul style="list-style-type: none"> <li>a. Project Name</li> <li>b. Top Task Number</li> <li>c. Top Task Name</li> <li>d. Baseline Name</li> <li>e. Primary Baseline</li> <li>f. Baseline Version Start Date</li> <li>g. Baseline Version Finish Date</li> <li>h. Baseline Version Labor Cost</li> <li>i. Baseline Version Expense Amount</li> <li>j. Baseline Version Effort</li> </ul> </li> </ul>

## Baseline Variance Dashboard

The Baseline Variance dashboard displays the effort, cost, and date variances for the top level tasks for all the active projects.

The dashboard uses the Project Management - Planning Real Time subject area.

The dashboard consists of the Baseline Variance Analysis.

### Key Insights

This dashboard answers the following business question:

- What's the effort, cost, and date variances for the tasks in a project?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review the performance of your project.
What can I do with this dashboard?	You can drill down to the subtasks using the Task Name column to analyze the variance in detail.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Project Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Baseline Variance Analysis.

View	Displayed Information
View Name	Baseline Variance Analysis
View Sections	<ul style="list-style-type: none"> <li>Table</li> <li>Graph</li> </ul>
Table Column and Measures	<ul style="list-style-type: none"> <li>Table view:                             <ol style="list-style-type: none"> <li>Project Name</li> <li>Task Name</li> <li>Primary Resource</li> <li>Start Date Variance in Days</li> <li>Finish Date Variance in Days</li> <li>Effort Variance in Hours</li> <li>Labor Cost Variance</li> <li>Expense Amount Variance</li> </ol> </li> <li>Graph view:                             <ol style="list-style-type: none"> <li>Project Name</li> <li>X- Axis: Task Name</li> <li>Y- Axis: Duration in Hours</li> </ol> </li> </ul>

## Planned and Actual Dates Comparison Dashboard

The Planned and Actual Dates Comparison dashboard displays the planned and actual dates for the top level tasks for all the active projects.

The dashboard uses the Project Management - Planning Real Time subject area.

The dashboard consists of the Planned and Actual Dates Comparison analysis.

## Key Insights

This dashboard answers the following business question:

- What is the planned and actual schedule for my projects?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to compare the planned and actual dates for the tasks of your project. For example, tasks that are behind schedule.
What can I do with this dashboard?	You can drill down to the subtasks using the Task Name column to analyze the variance in detail.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Project Status	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>

The following table lists the views in the Planned and Actual Dates Comparison analysis.

View	Displayed Information
View Name	Planned and Actual Dates Comparison
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project Name</li> <li>2. Task Name</li> </ol>



View	Displayed Information
	<ol style="list-style-type: none"> <li>3. Primary Resource</li> <li>4. Planned Start Date</li> <li>5. Planned End Date</li> <li>6. Actual Start Date</li> <li>7. Actual Finish Date</li> <li>8. Current Finish Date</li> <li>9. Schedule Status</li> </ol>

## Planned and Actual Project Labor Comparison Dashboard

The Planned and Actual Project Labor Comparison dashboard displays the planned and actual margin, margin percentage, and margin variance for the selected project.

The dashboard uses the Project Management - Planning Real Time subject area.

The dashboard consists of the Planned and Actual Project Labor Comparison Report.

### Key Insights

This dashboard answers the following business questions:

- What are the planned and actual margins of my projects?
- What are the planned and actual margin percentages of my projects?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review the margins and margin percentages for your projects.
What can I do with this dashboard?	Review the following for your projects: <ul style="list-style-type: none"> <li>• Planned margin and margin percentage</li> <li>• Actual margin and margin percentage</li> <li>• Variance between planned and actual margin and margin percentage</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Labor Bill Amount	Filter	Is greater than 0

The following table lists the views in the Planned and Actual Project Labor Comparison analysis.

View	Displayed Information
View Name	Planned and Actual Labor Comparison
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project Name</li> <li>2. Planned Margin</li> <li>3. Actual Margin</li> <li>4. Variance</li> <li>5. Planned</li> <li>6. Actual</li> <li>7. Variance</li> </ol>

## Project Cost Variance Dashboard

The Project Cost Variance dashboard displays the planned and actual amounts and their variance for labor, expense, and total cost categories by task for the selected project.

The dashboard uses the Project Management - Planning Real Time subject area.

The dashboard consists of Project Cost Variance Report.

### Key Insights

This dashboard answers the following business question:

- What are the planned and actual costs for my projects?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports

FAQ	Answer
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review the planned and actual amounts for your project costs.
What can I do with this dashboard?	Review by project task: <ul style="list-style-type: none"> <li>Planned and actual labor and their variance</li> <li>Planned and actual expense and their variance</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views for Project Cost Variance analysis.

View	Displayed Information
View Name	Project Cost Variance
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Task                             <ol style="list-style-type: none"> <li>Task Name</li> </ol> </li> <li>Labor                             <ol style="list-style-type: none"> <li>Planned</li> <li>Actual</li> <li>Variance</li> </ol> </li> <li>Expense                             <ol style="list-style-type: none"> <li>Planned</li> <li>Actual</li> <li>Variance</li> </ol> </li> </ol>

View	Displayed Information
	<ol style="list-style-type: none"> <li>4. Total                             <ol style="list-style-type: none"> <li>a. Planned</li> <li>b. Actual</li> <li>c. Variance</li> </ol> </li> </ol>

## Resources Currently on My Projects Dashboard

The Resources Currently on My Projects dashboard displays all resources who are currently assigned to the projects managed by you.

The dashboard uses the Project Management - Project Resources Real Time subject area.

The dashboard consists of Resources Currently on My Projects Report.

### Key Insights

This dashboard answers the following business question:

What are the statuses of the resources currently working on my projects?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review the resources working on your projects.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• Review resource assignment status</li> <li>• Monitor resource assignment dates</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Resources Currently on My Projects analysis.

View	Displayed Information
View Name	Resources Currently on My Projects
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Resource Name</li> <li>Project</li> <li>Assignment Status</li> <li>Project Resource Role</li> <li>Resource From Date</li> <li>Resource To Date</li> <li>Percentage Allocation</li> </ol>

## Placeholder Resources on My Projects Dashboard

The Placeholder Resources on My Projects dashboard displays the unstaffed positions listed for the projects managed by you.

The dashboard uses the Project Management - Project Resources Real Time subject area.

The dashboard consists of Placeholder Resources on My Projects Report.

### Key Insights

This dashboard answers the following business question:

Who are the placeholder resources assigned to my projects?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to view the placeholder resource assignments for your projects.

FAQ	Answer
What can I do with this dashboard?	Review unstaffed positions and placeholder resources assigned to your projects.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the Placeholder Resources on My Projects analysis.

View	Displayed Information
View Name	Placeholder Resources on My Projects
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Name</li> <li>Resource Name</li> <li>Project Resource Role</li> <li>Resource from Date</li> <li>Resource To Date</li> <li>Allocation</li> <li>Planned Start Date</li> </ol>

## Resource Allocation and Task Assignment Comparison by Week Dashboard

The Resource Allocation and Task Assignment Comparison by Week dashboard displays the weekly comparison of allocated and total task assignment hours for the resources of a project.

The dashboard uses the Project Management - Project Resources Real Time and Project Management - Planning Real Time subject areas.

The dashboard consists of Resource Allocation and Task Assignment Comparison by Week Report.

## Key Insights

This dashboard answers the following business questions:

- What are the allocated hours for my project resources?
- What are the assignment percentages for my project resources?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review resource allocation for your projects.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• Review resource allocation hours and assignment percentages.</li> <li>• Drill down to individual weeks from the Week and Calendar Week Start Date columns.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Resource Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>

The following table lists the views in the Resource Allocation and Task Comparison by Week analysis.

View	Displayed Information
View Name	Resource Allocation and Task Assignment Comparison by Week
View Sections	<ul style="list-style-type: none"> <li>• Table</li> </ul>

View	Displayed Information
	<ul style="list-style-type: none"> <li>Graph</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Week</li> <li>Calendar Week Start Date</li> <li>Allocated Hours</li> <li>Total Task Assignment Hours</li> <li>Percentage Task Assignment</li> </ol>

## Tasks Scheduled Outside of Resource Assignment Dates Dashboard

The Tasks Scheduled Outside of Resource Assignment Dates dashboard displays the project tasks that are scheduled outside the project resource assignment dates.

The dashboard uses the Project Management - Project Resources Real Time and Project Management - Planning Real Time subject areas.

The dashboard consists of Tasks Scheduled Outside of Resource Assignment Dates Report.

### Key Insights

This dashboard answers the following business question:

Which project tasks are scheduled outside my project resource assignment dates?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to view tasks that lie outside your resource assignment dates.
What can I do with this dashboard?	You can use this report to take decisions on tasks that are scheduled outside resource assignment dates.
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details



The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Task Start Date and Resource From Date	Filter	Task Start Date < Resource From Date
Task Finish Date and Resource To Date	Filter	Task Finish Date > Resource To Date

The following table lists the views in the Tasks Scheduled Outside of Resource Assignment Dates analysis.

View	Displayed Information
View Name	Tasks Assigned Outside Resource Allocation Dates
View Sections	<ul style="list-style-type: none"> <li>• Pivot table</li> <li>• Pivot table:2</li> <li>• Pivot table:3</li> <li>• Pivot table:4</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Task Start Date</li> <li>2. Project Name</li> <li>3. Task Name</li> <li>4. Resource Name</li> <li>5. Task Finish Date</li> <li>6. Resource From Date</li> <li>7. Resource To Date</li> <li>8. Assignment Status</li> <li>9. Task Percent Complete</li> </ol>

## Remaining Project Hours Dashboard

The Remaining Project Hours dashboard displays the effort in hours, actual hours, and remaining hours for all projects using the project hierarchy.

The dashboard uses the Project Management - Project Hierarchy Real Time subject area.

The dashboard consists of Remaining Project Hours Report.

### Key Insights

This dashboard answers the following business questions:

- How many hours have been spent on a project?
- How many hours are remaining on a project?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Executive
When do I use this dashboard?	When you need to look up the hours remaining on a project.
What can I do with this dashboard?	Review remaining hours for your projects.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Start Date	Filter	Prompted
End Date	Filter	Prompted

The following table lists the views in the Remaining Project Hours analysis.

View	Displayed Information
View Name	Remaining Project Hours
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project Hierarchy</li> <li>2. Project Name</li> <li>3. Start Date</li> <li>4. End Date</li> <li>5. Effort in Hours</li> <li>6. Actual Hours</li> <li>7. Remaining Hours</li> </ol>

## Total Cost vs Actual Cost By EPS Element Dashboard

The Total Cost vs Actual Cost by EPS Element dashboard displays the actual and total costs for the nodes in the project hierarchy.

The dashboard uses the Project Management - Project Hierarchy Real Time subject area.

The dashboard consists of Total Cost vs Actual Cost by EPS Element Report.

### Key Insights

This dashboard answers the following business questions:

- What are the actual costs for the nodes in my project hierarchy?
- What are the total costs for the nodes in my project hierarchy?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Executive
When do I use this dashboard?	When you need to view the costs for the nodes in your project hierarchy.
What can I do with this dashboard?	View the following for project hierarchy nodes: <ul style="list-style-type: none"> <li>• Actual cost</li> <li>• Total cost</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Hierarchy	Dashboard prompt	Choice list

The following table lists the views in the Total Cost vs Actual Cost by EPS Element analysis.

View	Displayed Information
View Name	Total Cost vs Actual Cost by EPS Element
View Type	<ul style="list-style-type: none"> <li>• Table</li> <li>• Graph</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Total Cost</li> <li>2. Total Actual Cost</li> <li>3. Project Hierarchy</li> </ol>

## My Project Work Items Dashboard

The My Project Work Items dashboard displays all the work items for the projects managed by you.

The dashboard uses the Project Management - Project Work Items Real Time subject area.

The dashboard consists of My Project Work Items report.

### Key Insights

This report answers the following business questions:

- What are the work items for my projects?
- What are the work item statuses that determine the completion of my project tasks?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to track your project work items.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View all work items and work item statuses for your projects.</li> <li>• Drill down into work items for a specific project.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Report Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Work Item Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Work Item Type	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>

The following table lists the views in the My Project Work Items analysis.

View	Displayed Information
View Name	My Project Work Items
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Name</li> <li>Owner</li> <li>Work Item Name</li> <li>Work Item Type</li> <li>Work Item Priority</li> <li>Work Item Status</li> <li>Task Completion Event</li> <li>Due Date</li> <li>Task Name</li> <li>Task Completion Event Status</li> </ol>

## Deliverables Due in My Projects Dashboard

The Deliverables Due in My Projects dashboard displays project deliverables that are overdue by a week or due in a week for the projects managed by you.

The dashboard uses the Project Management - Project Work Items Real Time subject area.

The dashboard consists of Deliverables Due in My Projects report.

## Key Insights

This dashboard answers the following business questions:

- Which of my project deliverables are due in a week?
- Which of my project deliverables are overdue by a week?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to track your project deliverables.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• Gain insight into overdue and immediately due deliverables.</li> <li>• Drill down to view incomplete deliverables for a project.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Owner	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Days Due	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• SQL source of list of values:                       Select 'Due in 7 Days or less' From "Project Management - Project Work Items Real Time" UNION Select 'Due in 7 Days or more' From "Project Management - Project Work Items Real Time" UNION Select 'Overdue by 7 Days or less' From                 </li> </ul>

Column	Type	Rules
		"Project Management - Project Work Items Real Time" UNION Select 'Overdue by 7 Days or more' From "Project Management - Project Work Items Real Time" <ul style="list-style-type: none"> <li>• Default selection: Due in 7 Days or less</li> </ul>
Days Due	Filter	Is not null
Work Item	Filter	Equals 'Deliverable'
Work Item Status	Filter	Not 'COMPLETED'

The following table lists the views in the Deliverables Due in My Projects Analysis.

View	Displayed Information
View Name	Deliverables Due in My Projects Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project Name</li> <li>2. Task Name</li> <li>3. Owner</li> <li>4. Deliverable Name</li> <li>5. Deliverable Type</li> <li>6. Deliverable Priority</li> <li>7. Due Date</li> <li>8. Days Due</li> </ol>

## My Project Deliverables Not Started Dashboard

The My Project Deliverables Not Started dashboard displays all project deliverables that are overdue or due in the immediate future for the projects managed by you.

The dashboard uses the Project Management - Project Work Items Real Time subject area.

The dashboard consists of My Project Deliverable Not Started analysis.

### Key Insights

This dashboard answers the following business questions:

- Which of my project deliverables are overdue?
- Which of my project deliverables are due soon?
- Which of my project deliverables are yet to start?

## Frequently Asked Questions

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to track your project deliverables.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• Drill down into new high priority project deliverables.</li> <li>• Identify and begin working on project deliverables that are overdue or due soon.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Report Details

The following table lists the prompts and filters used in the dashboard.

Filter on Column	Type	Rules
Deliverable Priority	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• SQL source of list of values:                       SELECT "Work Item Priority","Work Item Priority Name" FROM "Project Management - Project Work Items Real Time" WHERE "Work Item Priority"."Work Item Priority Name" IN ('High','Low','Medium') FETCH FIRST 65001 ROWS ONLY</li> </ul>
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Work Item	Filter	Equals Deliverable
Status	Filter	Equals New

The following table lists the views in the analysis.



View	Displayed Information
View Name	My Project Deliverables Not Started analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project</li> <li>2. Task Name</li> <li>3. Owner</li> <li>4. Status</li> <li>5. Deliverable Type</li> <li>6. Deliverable Priority</li> <li>7. Deliverable Name</li> <li>8. Due Date</li> </ol>

## Project Requirements

### Backlog Item Status Dashboard

The Backlog Item Status dashboard displays the total number of backlog items by status for every product owner and scrum master.

The dashboard uses the Project Management - Requirements Real Time subject area.

The dashboard consists of the Backlog Item Status Analysis and you can drill down to the following analyses from the Backlog Item Status Analysis.

- Backlog Item Status Analysis having Complete Status Detailed report
- Backlog Item Status Analysis having Draft Status Detailed report
- Backlog Item Status Analysis having Ready Status Detailed report

### Key Insights

This dashboard answers the following business question:

- What's the total number of backlog items by status for a product in a given sprint?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Product Owner</li> </ul>

FAQ	Answer
	<ul style="list-style-type: none"> <li>Scrum Master</li> </ul>
When do I use this dashboard?	When you need to review the number of backlog items by status.
What can I do with this dashboard?	You can view the: <ul style="list-style-type: none"> <li>Number of backlog items for each sprint in a given release grouped by status.</li> <li>Backlog item owner</li> <li>Drill down to: view backlog item details for each of the status from this analysis.                             <ul style="list-style-type: none"> <li>Backlog Item Status Analysis having Complete Status Detailed analysis using the # of Completed Backlog Items column.</li> <li>Backlog Item Status Analysis having Draft Status Detailed analysis using the # of Draft Backlog Items column.</li> <li>Backlog Item Status Analysis having Ready Status Detailed analysis using the # of Ready Backlog Items column.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Product	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Release	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Sprint	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>

The following table lists the views in the Backlog Item Status Analysis.

View	Displayed Information
View Name	Backlog Item Status Analysis
View Sections	None

View	Displayed Information
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Product</li> <li>2. Release</li> <li>3. Sprint</li> <li>4. Backlog Item Owner</li> <li>5. Scrum Master</li> <li>6. # of Draft Backlog Items</li> <li>7. # of Ready Backlog Items</li> <li>8. # of Completed Backlog Items</li> </ol>

## Backlog Item Sprint Velocity Dashboard

The Backlog Item Sprint Velocity dashboard displays the total number of story points completed in each sprint of a release. This information helps the product owner to plan new work for upcoming releases.

The dashboard uses the Project Management - Requirements Real Time subject area.

The dashboard consists of Backlog Item Sprint Velocity Analysis report.

### Key Insights

This dashboard answers the following business question:

- What's the total number of story points achieved in each sprint of a release?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Product Owner
When do I use this dashboard?	When you need to: <ul style="list-style-type: none"> <li>• Review the story points achieved in a release sprint by a scrum master.</li> <li>• Plan work for upcoming releases based on the number of backlog items completed in prior and current sprints</li> </ul>
What can I do with this dashboard?	<ul style="list-style-type: none"> <li>• View the number of story points assigned to every scrum master.</li> <li>• Analyze if the work must be redistributed between scrum masters.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Product	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Release	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Backlog Item Status	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Enter values enabled</li> <li>Values limited by All Prompts</li> </ul>

The following table lists the views in the Backlog Item Sprint Velocity Analysis.

View	Displayed Information
View Name	Backlog Item Sprint Velocity Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Product</li> <li>Release</li> <li>Backlog Item Status</li> <li>Sprint</li> <li>Backlog Item Owner</li> <li>Scrum Master</li> <li>Total Story Points</li> </ol>

## Backlog Completeness Check Dashboard

The Backlog Completeness Check dashboard displays the total number of the backlog items with the exceptions for your backlogs. Exceptions include missing user stories, story points, or acceptance criteria.

The dashboard uses the Project Management - Requirements Real Time subject area.

The dashboard consists of Backlog Completeness Check Analysis Report and you can drill down to the following analyses from the Backlog Completeness Check Analysis Report.

- Backlog Completeness Check Analysis Detailed without Acceptance Criteria report
- Backlog Completeness Check Analysis Detailed without Story points report
- Backlog Completeness Check Analysis Detailed without User Story points report

## Key Insights

This dashboard answers the following business questions:

- Which of my backlog items have exceptions?
- What are the exceptions for my backlog items?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Product Owner</li> <li>• Scrum Master</li> </ul>
When do I use this dashboard?	When you need to review the completeness of backlog items by product in a release.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the number of backlog items with exceptions, such as story points, acceptance criteria, and user story.</li> <li>• Drill down to:                             <ul style="list-style-type: none"> <li>○ Backlog Completeness Check Analysis Detailed without Acceptance Criteria analysis using the # of Backlog Items Without Acceptance Criteria column</li> <li>○ Backlog Completeness Check Analysis Detailed without Story Points analysis using the # of Backlog Items Without Story Points column</li> <li>○ Backlog Completeness Check Analysis Detailed without User Story analysis # of Backlog Items Without User Story column</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Product	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Release	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>
Sprint	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Values limited by All Prompts</li> </ul>

The following table lists the views in the Backlog Completeness Check Analysis.

View	Displayed Information
View Name	Backlog Completeness Check Analysis
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Product</li> <li>Release</li> <li>Sprint</li> <li>Requirement Name</li> <li>Backlog Item Owner</li> <li># of Backlog Items</li> <li># of Backlog Items Without Story Points</li> <li># of Backlog Items Without Acceptance Criteria</li> <li># of Backlog Items Without User Story</li> </ol>

## Project Hours by Backlog Item Dashboard

The Project Hours by Backlog Item dashboard displays the effort in hours, actual and remaining, for all backlog items.

The dashboard uses the Project Management - Requirements Real Time subject area.

The dashboard consists of Project Hours by Backlog Item Analysis report.

### Key Insights

This dashboard answers the following business questions:

- What are the planned hours for each backlog item?
- What are the backlog items for my projects in a sprint?
- How much effort is remaining for my backlog items?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Manager
When do I use this dashboard?	When you need to review the planned and remaining effort for your backlog items.
What can I do with this dashboard?	You can analyze if: <ul style="list-style-type: none"> <li>• The planned hours are sufficient for your backlog items.</li> <li>• Story point estimation for your backlog items is correct.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Product	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Values limited by All Prompts</li> </ul>
Sprint	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Values limited by All Prompts</li> </ul>
Backlog Item Status	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Values limited by All Prompts</li> </ul>

The following table lists the views in the Project Hours by Backlog Item Analysis.

View	Displayed Information
View Name	Project Hours by Backlog Item Analysis
View Sections	None

View	Displayed Information
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Product</li> <li>2. Backlog Item Status</li> <li>3. Sprint Name</li> <li>4. Backlog Item</li> <li>5. Backlog Item Owner</li> <li>6. Scrum Master</li> <li>7. Story Points</li> <li>8. Project Name</li> <li>9. Effort in Hours</li> <li>10. Actual Hours</li> <li>11. Remaining Hours</li> </ol>

## Resource Management

### Resource Management Dashboard

The Resource Management dashboard displays summary information for resource supply and demand. You can also edit and create a copy of the dashboard to fit your own business requirements.

The dashboard uses the Projects - Project Resource Management - Resource Management Real Time and Projects - Project Resource Management - Resource Pool Real Time subject areas.

The dashboard consists of the following summary analysis:

- Projected Utilization Next 13 Weeks
- Billable Assigned Hours Next 13 Weeks
- Underutilized Resources Next 13 Weeks
- Proposed Resources Awaiting Approval
- Capacity vs Utilization
- Projected Utilization

### Key Insights

This dashboard answers the following business questions:

- How is my resource supply?
- Are my resources effectively utilized?
- What is the billable utilization of my resources?
- Are my resources assigned effectively on projects and tasks?
- Are we seeing any trends in demand?



## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics - Shared Folders - Projects - Dashboards
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review effective resource utilization for a project.
What can I do with this dashboard?	You can view how well resource management is functioning. You get an overview of resource demand, capacity, and utilization. It also helps you predict insight into future demand for roles and qualifications and the amount of time requested.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Resource Pool Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection SQL:                             <pre>SELECT "- Resource Pool"."Resource Pool Name" FROM "Project Resource Management - Resource Management Real Time" WHERE "- Resource Pool"."Resource Pool Name" IN (VALUEOF(NQ_SESSION.RESOURCE_POOL_LIST))</pre> </li> <li>Presentation variable: vResourcePool</li> </ul>
Start Month	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Choice List Values SQL:                             <pre>SELECT "Time"."Month" FROM "Project Resource Management - Resource Management Real Time" WHERE ("Time"."Date" &gt; TIMESTAMPADD(SQL_TSI_MONTH,-12, CURRENT_DATE) and "Time"."Date" &lt; TIMESTAMPADD(SQL_TSI_MONTH,12, CURRENT_DATE) ) order by "Time"."Month" description FETCH FIRST 65001 ROWS ONLY</pre> </li> <li>Default selection SQL:</li> </ul>

Column	Type	Rules
		<p>SELECT "Time"."Month" FROM "Project Resource Management - Resource Management Real Time" WHERE ("Time"."Date" = CURRENT_DATE) FETCH FIRST 65001 ROWS ONLY</p> <ul style="list-style-type: none"> <li>• Presentation variable: vMonthStart</li> </ul>
End Month	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Choice List Values SQL:                                                           SELECT '1-5' FROM "Project Resource Management - Resource Management Real Time" union all SELECT '6-10' FROM "Project Resource Management - Resource Management Real Time" union all SELECT '11-15' FROM "Project Resource Management - Resource Management Real Time" union all SELECT '&gt;15' FROM "Project Resource Management - Resource Management Real Time"                         </li> <li>• Default selection SQL:                                                           SELECT '1-5' FROM "Project Resource Management - Resource Management Real Time"                         </li> <li>• Presentation variable: vMonthEnd</li> </ul>
Resource Pool Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection SQL:                                                           SELECT "- Resource Pool"."Resource Pool Name" FROM "Project Resource Management - Resource Management Real Time" WHERE "- Resource Pool"."Resource Pool Name" IN (VALUEOF(NQ_SESSION.RESOURCE_POOL_LIST))                         </li> <li>• Presentation variable: vResourcePool</li> </ul>
Resource Staffing Owner Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: None</li> <li>• Presentation variable: vResourceStaff</li> </ul>
Project Role Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> <li>• Default selection: All Column Values</li> <li>• Presentation variable: vProjectRole</li> </ul>
Top Roles/Qualification	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Select multiple values SQL</li> </ul> <pre>SELECT '1-5' FROM "Project Resource Management - Resource Management Real Time" union all SELECT '6-10' FROM "Project Resource Management - Resource Management Real Time" union all SELECT '11-15' FROM "Project Resource Management - Resource Management Real Time" union all SELECT '&gt;15' FROM "Project Resource Management - Resource Management Real Time"</pre> <ul style="list-style-type: none"> <li>Default selection SQL:</li> </ul> <pre>SELECT '1-5' FROM "Project Resource Management - Resource Management Real Time"</pre> <ul style="list-style-type: none"> <li>Presentation variable: V_Rank1</li> </ul>

The following table lists the views for the Resource Management analysis.

View	Displayed Information
View Name	Resource Management
View Sections	<ul style="list-style-type: none"> <li>Projected Utilization Next 13 Weeks</li> <li>Billable Assigned Hours Next 13 Weeks</li> <li>Underutilized Resources Next 13 Weeks</li> <li>Proposed Resources Awaiting Approval</li> <li>Capacity vs Utilization</li> <li>Projected Utilization</li> </ul>
Graphs and Tables	Demand Trend Of Requests <ul style="list-style-type: none"> <li>Month</li> <li>Project Role Name</li> <li>Total Requests</li> </ul> Demand Trend Of Request Time <ul style="list-style-type: none"> <li>Month</li> <li>Project Role Name</li> <li>Total Requested Time (In Hours)</li> </ul>

## Invalid Resource Assignments Dashboard

The Invalid Resource Assignments dashboard displays resources assigned to tasks or projects that are outside of the resources' effective dates in the organization, for the projects you manage.

The dashboard uses the Project Management - Project Resources Real Time and Project Management - Planning Real Time subject areas.

The dashboard consists of the Invalid Resource Assignments analysis.

### Key Insights

This dashboard answers the following business question:

- Which resources are assigned to tasks or projects outside of their effective dates?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Resource Manager</li> </ul>
When do I use this dashboard?	When you need to review which resources are incorrectly assigned to tasks or projects.
What can I do with this dashboard?	You can view a resources' effective, assignment, and task start and finish dates sorted by projects.
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the views in the Invalid Resource Assignments analysis.

View	Displayed Information
View Name	Invalid Resource Assignments
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Project Name</li> <li>2. Resource Name</li> </ol>

View	Displayed Information
	<ol style="list-style-type: none"> <li>3. Resource From Date</li> <li>4. Resource To Date</li> <li>5. Resource Assignment From Date</li> <li>6. Resource Assignment To Date</li> <li>7. Task Start Date</li> <li>8. Task End Date</li> </ol>

## Resource Capacity Planning by Project Role Dashboard

The Resource Capacity Planning by Project Role dashboard displays requested hours, capacity hours, assigned hours, remaining capacity hours, and the capacity surplus or shortfall for project roles for a specified date range.

The dashboard uses the Project Resource Management - Resource Management Real Time subject area.

**Note:** Click the Capacity Planning link to open the Resource Capacity Planning by Project Role dashboard.

The dashboard consists of Resource Assigned Hours by Project and Role analysis and you can drill down to the following analyses from the Resource Assigned Hours by Project and Role analysis.

- Resource Assigned Hours by Role and Project
- Resource Capacity Planning by Role and Resource

You can also drill down to the following dashboards from the Resource Capacity Planning by Project Role dashboard:

- Capacity Planning by Role and Resource
- Resource Assigned Hours by Role and Project

### Key Insights

This dashboard answers the following business questions:

- What are the capacity hours of my resources?
- Are my resources being optimally utilized?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review your: <ul style="list-style-type: none"> <li>• Resource utilization</li> </ul>

FAQ	Answer
	<ul style="list-style-type: none"> <li>Capacity planning</li> </ul>
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>Review if your resources are being optimally utilized.</li> <li>Drill down to the Resource Capacity Planning by Role and Project analysis using the Total Requested Hours column.</li> <li>Drill down into:                             <ul style="list-style-type: none"> <li>Resource Assigned Hours by Project and Role analysis.</li> <li>Resource Capacity Planning by Role and Resource analysis.</li> </ul> </li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Role Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Required</li> <li>Is between field</li> </ul>

The following table lists the views in the Resource Capacity Planning by Project Role analysis.

View	Displayed Information
View Name	Resource Capacity Planning by Project Role
View Sections	<ul style="list-style-type: none"> <li>Table</li> <li>Graph</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Role</li> <li>Total Requested Hours</li> <li>Total Capacity Hours</li> <li>Total Assigned Hours</li> <li>Remaining Capacity Hours</li> <li>Capacity Surplus or Shortfall</li> </ol>

# Resource Pool Actual Utilization by Resource and Month Dashboard

The Resource Pool Actual Utilization by Resource and Month dashboard displays monthly actual hours and utilization percentages for a resource pool and the specified date range.

The dashboard uses the Project Resource Management - Resource Management Real Time subject area.

The dashboard consists of Resource Pool Actual Utilization by Resource and month Report and you can drill down to the following analysis from the Resource Pool Actual Utilization by Resource and Month Report.

- Resource Actual Utilization by Project Event and Month

## Key Insights

This dashboard answers the following business question:

Are my resources optimally utilized?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review your resource actual utilization.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• Review if your resources are meeting their target utilization.</li> <li>• Drill down to the Resource Actual Utilization by Project or Event and Month analysis using the Resource column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Resource Pool	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> </ul>

Column	Type	Rules
		<ul style="list-style-type: none"> <li>Select multiple values enabled</li> </ul>
Report Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Required</li> <li>Is between field</li> </ul>

The following table lists the views in the Resource Pool Actual Utilization by Resource and Month analysis.

View	Displayed Information
View Name	Resource Pool Actual Utilization by Resource and Month
View Sections	<ul style="list-style-type: none"> <li>Table</li> <li>Pivot table</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Resource Pool</li> <li>Resource</li> <li>Month and Year</li> </ol> <ol style="list-style-type: none"> <li>Actual Hours</li> <li>Actual Utilization</li> </ol>

## Resource Pool Projected and Actual Utilization by Resource Dashboard

The Resource Pool Projected and Actual Utilization by Resource dashboard displays resource pool projected hours and utilization percentages, actual hours and utilization percentages, and variance hours by resource for specified date ranges.

The dashboard uses the Project Resource Management - Resource Management Real Time subject area.

The dashboard consists of Resource Pool Projected and Actual Utilization by Resource Report.

### Key Insights

This dashboard answers the following business questions:

- Are my resources being effectively utilized?
- Which of my resources can be better utilized?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.



FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review and compare your projected and actual resource utilization.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>Identify possibilities for optimal resource utilization.</li> <li>Review variance between projected and actual hours.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Resource Pool Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Report Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Required</li> <li>Is between field</li> </ul>

The following table lists the views in the Resource Pool Projected and Actual Utilization by Resource analysis.

View	Displayed Information
View Name	Resource Pool Projected and Actual Utilization by Resource
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Resource Pool</li> <li>Resource</li> <li>Projected Hours</li> <li>Projected Utilization</li> <li>Actual Hours</li> <li>Actual Utilization</li> <li>Variance Hours</li> </ol>

## Project Resource Request Forecast Revenue Dashboard

The Project Resource Request Forecast Revenue dashboard displays the cost, revenue, and margin forecasts for requests in Open and Resource Proposed status for a specified date range.

The dashboard uses the Project Resource Management - Resource Management Real Time subject area.

The dashboard consists of Project Resource Request Forecast Revenue Report and you can drill down to the following analysis from the Project Resource Request Forecast Revenue Report.

- Project Resource Request Forecast Revenue

### Key Insights

This dashboard answers the following business questions:

- Which requests are in Open or Resource Proposed status?
- What is the forecasted revenue and margin for such resource requests?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review cost, revenue, and margin for your resource requests.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View requests in Open and Resource Proposed statuses.</li> <li>• Review forecasted margins for such requests.</li> <li>• Drill down to the Requested Resource Forecast Revenue Details analysis using the Project Name column.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

### Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Request Start Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Required</li> <li>Is between field</li> </ul>
Project Resource Request Target Cost Rate Currency	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> <li>Default selection SQL:  Select MAX(" Project Request Details"."Request Cost Rate Currency") from Project Resource Management - Resource Management Real Time</li> </ul>
Project Request Status	Filter	Equals 'OPEN' or 'PROPOSED'

The following table lists the views in the Project Resource Request Forecast Revenue analysis.

View	Displayed Information
View Name	Project Resource Request Forecast Revenue
View Sections	<ul style="list-style-type: none"> <li>Table</li> <li>Graph</li> </ul>
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Name</li> <li>Total Requested Hours</li> <li>Target Profit</li> <li>Target Revenue</li> <li>Target Cost</li> <li>Currency</li> </ol>

## Project Resource Assignment History by Resource Pool and Resource Dashboard

The Project Resource Assignment History by Resource Pool and Resource dashboard displays the project resource assignment details for assignments that are confirmed, pending adjustment, or canceled for resources in the specified resource pool and current assignment finish date range.

The dashboard uses the Project Resource Management - Resource Pool Real Time subject area.

The dashboard consists of the Project Resource Assignment History by Resource Pool and Resource analysis.

## Key Insights

This dashboard answers the following business questions:

- How many assignment adjustments are made to my resources' assignments?
- What assignments do my resources currently have and are any assignments adjusted from their original schedule?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review your resources' assignment and assignment adjustments if any.
What can I do with this dashboard?	You can view the assignment details for resources sorted by the resource pool.
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Resource Pool Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> <li>• Presentation Variable: RESRC_POOL_V</li> </ul>
Project Resource Assignment Finish Date	Dashboard prompt	<ul style="list-style-type: none"> <li>• Calendar</li> <li>• Required</li> <li>• Default Selection: SQL</li> </ul> <pre>SELECT TIMESTAMPADD (SQL_TSI_MONTH, -3, CURRENT_DATE) FROM "Project Resource Management - Resource Management Real Time"</pre> <ul style="list-style-type: none"> <li>• Presentation Variable: CURR_ASSIGN_FINISH_DT_V</li> </ul>

Column	Type	Rules
Variable	Dashboard prompt	<ul style="list-style-type: none"> <li>Text Field</li> <li>Data Type: Date</li> <li>Required</li> <li>Default Selection: SQL</li> </ul> <pre>SELECT TIMESTAMPADD(SQL_TSI_MONTH, +3, CURRENT_DATE) FROM "Project Resource Management - Resource Management Real Time"</pre> <ul style="list-style-type: none"> <li>Presentation Variable: CURR_ASSIGN_FINISH_DT2_V</li> </ul>

The following table lists the views in the Project Resource Assignment History by Resource Pool and Resource analysis.

View	Displayed Information
View Name	Project Resource Assignment History by Resource Pool and Resource
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Resource Pool</li> <li>Assignment Status</li> <li>Resource Name</li> <li>Project Name</li> <li>Original Assignment Start Date</li> <li>Original Assignment Finish Date</li> <li>Original Hours Per Day</li> <li>Current Assignment Start Date</li> <li>Current Assignment Finish Date</li> <li>Current Hours Per Day</li> <li>Number of Schedule Adjustments</li> </ol>

## Project Resource Request History by Resource Pool and Resource Dashboard

The Project Resource Request History by Resource Pool and Resource dashboard displays project resource request information including the requested role, location, quantity, and start and finish dates, for the specified resource pool or resource and requested start date range.

The dashboard uses the Project Resource Management - Resource Pool Real Time subject area.

The dashboard consists of the Project Resource Request History by Resource Pool and Resource analysis.

## Key Insights

This dashboard answers the following business questions:

- What are the requests for which my resources are requested, reserved, rejected, or confirmed?
- Which resources have I proposed for a request that are awaiting project managers response?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review your resources' requests.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the request details for resources sorted by the resource pool.</li> <li>• Use the Project Name column to view all requests for a particular project.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Resource Pool Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Resource Name	Dashboard Prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Request Start Date	Dashboard prompt	<ul style="list-style-type: none"> <li>• Calendar</li> <li>• Required</li> <li>• Is between</li> <li>• Default Selection: SQL</li> </ul> <pre>SELECT TIMESTAMPADD (SQL_TSI_MONTH, -3, CURRENT_DATE) FROM "Project Resource Management - Resource Management Real Time"</pre>

Column	Type	Rules
		SELECT TIMESTAMPADD(SQL_TSI_MONTH, +3, CURRENT_DATE) FROM "Project Resource Management - Resource Management Real Time"

The following table lists the views in the Project Resource Request History by Resource Pool and Resource analysis.

View	Displayed Information
View Name	Project Resource Request History by Resource Pool and Resource
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Resource Pool</li> <li>2. Resource Name</li> <li>3. Project Name</li> <li>4. Requested Role</li> <li>5. Resource Status</li> <li>6. Requested Start Date</li> <li>7. Requested Finish Date</li> <li>8. Requested Quantity</li> <li>9. Request Name</li> <li>10. Location</li> </ol>

## Project Resource Request Resources by Project or Request Dashboard

The Project Resource Request Resources by Project or Request dashboard displays resource and project resource request details for resources associated with requests for the specified project, or a specified request, and requested start date range.

The dashboard uses the Project Resource Management - Resource Pool Real Time subject area.

The dashboard consists of the Project Resource Request Resources by Project or Request analysis.

### Key Insights

This dashboard answers the following business questions:

- What are the requests associated to a specific project?
- How many resources need to be assigned to unfulfilled requests?
- How many proposed requests are rejected for unfulfilled requests?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to review resource requests for various projects and their request status.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• View the requested and remaining quantities of resources for a requested role for a project.</li> <li>• Use the Project Name column to view the request status of a request for a particular project.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in this dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Required</li> <li>• Select multiple values enabled</li> </ul>
Request Name	Dashboard Prompt	<ul style="list-style-type: none"> <li>• Choice list</li> <li>• Select multiple values enabled</li> </ul>
Request Start Date	Dashboard prompt	<ul style="list-style-type: none"> <li>• Calendar</li> <li>• Is between</li> </ul>

The following table lists the views in the Project Resource Request Resources by Project or Request analysis.

View	Displayed Information
View Name	Project Resource Request Resources by Project or Request
View Sections	None
Table Column and Measures	1. Request Name



View	Displayed Information
	<ol style="list-style-type: none"> <li>2. Resource Primary Project Role</li> <li>3. Resource</li> <li>4. Project Name</li> <li>5. Requested Role</li> <li>6. Resource Status</li> <li>7. Request Status</li> <li>8. Requested Start Date</li> <li>9. Requested Finish Date</li> <li>10. Requested Quantity</li> <li>11. Remaining Quantity</li> </ol>

## Projected Revenue Shortfall by Resource Dashboard

The Projected Revenue Shortfall by Resource dashboard displays target hours, projected hours, variance hours, and projected revenue shortfall for resources that don't meet their target utilization in a specified resource pool.

The dashboard uses the Project Resource Management - Resource Management Real Time subject area.

The dashboard consists of Projected Revenue Shortfall by Resource Report.

### Key Insights

This dashboard answers the following business questions:

- Which resources will not meet their target utilization in the next period?
- What's the projected revenue shortfall due to such resources?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Resource Manager
When do I use this dashboard?	When you need to track underutilized resources.
What can I do with this dashboard?	You can: <ul style="list-style-type: none"> <li>• Identify resources that don't meet their target utilization.</li> <li>• View projected revenue shortfall due to under utilization of resources.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Resource Pool Name	Dashboard prompt	<ul style="list-style-type: none"> <li>Choice list</li> <li>Select multiple values enabled</li> </ul>
Report Date	Dashboard prompt	<ul style="list-style-type: none"> <li>Calendar</li> <li>Required</li> <li>Is between field</li> </ul>

The following table lists the views in the Projected Revenue Shortfall by Resource analysis.

View	Displayed Information
View Name	Projected Revenue Shortfall by Resource
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Project Role</li> <li>Resource</li> <li>Resource Pool</li> <li>Target Hours</li> <li>Projected Hours</li> <li>Variance Hours</li> <li>Resource Bill Rate</li> <li>Resource Bill Rate Currency</li> <li>Projected Revenue Shortfall</li> </ol>

## Task Management

### My Upcoming Tasks Dashboard

The My Upcoming Tasks dashboard displays the project task names, task start and finish dates, and percentage of tasks complete by task type for incomplete tasks that are due within the entered date range.

The dashboard uses the Project Management - Task Management Real Time subject area.

The dashboard consists of My Upcoming Tasks Report.

## Key Insights

This dashboard answers the following business questions.

- Which project tasks are due in 7 days?
- In how many days are my project tasks due?

## Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Team Member
When do I use this dashboard?	When you need to track your project tasks.
What can I do with this dashboard?	You can review: <ul style="list-style-type: none"> <li>• Due dates for your tasks.</li> <li>• Percentage of tasks complete for your projects.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Owner	Dashboard prompt	Choice list
Days Due	Dashboard prompt	Text field
Days Due	Filter	<ul style="list-style-type: none"> <li>• Is not null</li> <li>• Is between 0 and 7</li> </ul>
Percent Complete	Filter	Not 100

The following table lists the views in the My Upcoming Tasks analysis.

View	Displayed Information
View Name	My Upcoming Tasks
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>1. Days Due</li> <li>2. Task Type Name</li> <li>3. Task Name</li> <li>4. Owner</li> <li>5. Percent Complete</li> </ol>

## Project Work Coming Due Dashboard

The Project Work Coming Due dashboard displays the project tasks, milestones, and action items that are due for your projects within the entered date range.

The dashboard uses the Project Management - Task Management Real Time subject area.

The dashboard consists of Project Work Coming Due Report.

### Key Insights

This dashboard answers the following business questions:

- Which project tasks are incomplete?
- Which project tasks, milestones, and action items are due?

### Frequently Asked Questions

The following table lists the frequently asked questions about this dashboard.

FAQ	Answer
How do I find this dashboard?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this dashboard?	Project Team Member
When do I use this dashboard?	When you need to track your project tasks, milestones, and action items.
What can I do with this dashboard?	You can review: <ul style="list-style-type: none"> <li>• Project tasks, milestones, and action items that are due.</li> <li>• Percentage of project tasks that is complete.</li> </ul>
What type of dashboard is this?	Oracle Transactional Business Intelligence

## Details

The following table lists the prompts and filters used in the dashboard.

Column	Type	Rules
Project Name	Dashboard prompt	Choice list
Days Due	Dashboard prompt	<ul style="list-style-type: none"> <li>Text field</li> <li>Operator: Less than or equal to</li> </ul>
Percent Complete	Filter	Not 100

The following table lists the views in the Project Work Coming Due analysis.

View	Displayed Information
View Name	Project Work Coming Due
View Sections	None
Table Column and Measures	<ol style="list-style-type: none"> <li>Task Type</li> <li>Task Name</li> <li>Owner</li> <li>Days Due</li> <li>Percent Complete</li> </ol>

## FAQs

### How can I report on all the tasks of a project?

You can use the predefined Project Tasks analysis.

Alternatively, you can create a new analysis using an Oracle Fusion Cloud Project Management subject area that has the Project Name and Task Name dimensions.

For example, you can create an analysis using the Project Control - Budgets Real Time subject area to view all the tasks of a project. If you want to view only those tasks for which project costs exist, then you can create an analysis using the Project Costing - Actual Costs Real Time subject area.

#### Related Topics

- [Project List Dashboard](#)
- [Project Task List Dashboard](#)

## Why doesn't employee name appear in my analyses?

You must have the required security profile to view the employee names in your analyses. Contact your application administrator to grant you the required access.

#### Related Topics

- [Set Up Security Profile to View Employee Names in Analyses](#)

## Can I query across multiple subject areas?

Yes, you can create reports that span multiple subject areas if the selected dimension attributes are common across all areas.

For more information, see Guidelines for creating cross subject area reports in Oracle Transactional BI (OTBI). [ID 1567672.1]

## Why don't the dates in my analysis match the actual values?

The dates in your analysis display according to the default time zone. Click the drop-down list next to your name in the global area to open your account. On the Preferences tab, change the time zone as required.

**Note:** You must be an administrator to edit the time zone.

## What happens if I synchronize project updates?

The application synchronizes updates to the project structure with budgets and forecasts, and denormalizes the modified task hierarchy for reporting in Oracle Transactional Business Intelligence.

A project application administrator or project manager can synchronize project updates for projects created using Project Financial Management applications. Alternatively, you can schedule the Denormalize Task Structure Hierarchies for Business Intelligence process to run periodically from the Scheduled Processes page.

If you manage projects using Project Execution Management applications, you can run the process only from the Scheduled Processes page.

#### Related Topics

- [How Task Structure Hierarchies Are Denormalized](#)

# 4 Flexfields

## Overview of Flexfield Use in Analyses

Flexfields are extensible sets of placeholder fields associated with business objects that can be placed on application pages. They're used to extend business objects and meet your data management requirements without changing the data model or performing any database programming.

To include flexfields you have used for extension for use in analyses, you must enable them for business intelligence.

Extension of analyses using flexfields is available for Oracle Enterprise Resource Planning Cloud and Oracle Human Capital Management Cloud.

### Flexfield Types

The following types of flexfields are available and provide a means to modify application features without programming:

- Descriptive
- Extensible
- Key

Depending on the flexfield type, business intelligence enablement is performed differently and has different requirements. Once they are enabled for business intelligence, you can import any changes made to flexfields automatically using an import scheduled process.

## Configure Key Flexfields for Transactional Business Intelligence

### Enable Key Flexfields for Business Intelligence Reporting

To include flexfields in your analyses, you must enable them for Business Intelligence. Extensibility of analysis using flexfields is used for Enterprise Resource Planning and Human Capital Management. For Customer Relationship Management, the Extensibility Framework supports this.

To designate key flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. On the Manage Key Flexfields page, enter your search value in Key Flexfield Code.
3. Click **Manage Structure Instances**.
4. Enter your search value in Structure Instance Code.
5. Click **Edit** to display the Edit Key Flexfield Structure Instance dialog box.
6. Select the **BI Enabled** option, then click **OK**.
7. For each flexfield segment instance, repeat steps 5 through 6.
8. Click **Save**.

**9.** Populate the BI Object Name for each of the segment labels:

- a. Query the Key Flexfield Code in the Manage Key Flexfields window.
- b. From the Actions menu, select **Manage Segment Labels**.
- c. Populate the BI Object Name for each segment label to be mapped. The BI Object Name for the following qualified segment labels should not be modified:

Segment Label Code	BI Object Name
FA_COST_CTR	Dim - Cost Center
GL_BALANCING	Dim - Balancing Segment
GL_ACCOUNT	Dim - Natural Account Segment

Before you deploy a flexfield, you must access the Chart of Accounts Instance and assign the newly created segment label to the appropriate segment in the Chart of Accounts.

- d. Click **Deploy Flexfield**.
- e. Click **Save and Close**.

*Related Topics*

- [Considerations for Enabling Key Flexfield Segments for Business Intelligence](#)
- [How do I update existing setup data?](#)

## Overview of Supported Key Flexfields

Key flexfields are used to store internally defined codes unique to a particular business, specifying part numbers, general ledger accounts, and other business entities.

Product Area	Key Flexfield	Dimension
Fixed Assets	Category (CAT#)	Dim - Asset Category
Fixed Assets	Location (LOC#)	Dim - Asset Location
General Ledger	Accounting (GL#)	Dim - Balancing Segment Dim - Cost Center Dim - Natural Account
Payroll	Costing	Dim - Costing Segments



Product Area	Key Flexfield	Dimension
Supply Chain Management	Locator	Dim - Inventory Org
Supply Chain Management	Item Category	Dim - Item
Revenue Management	Pricing Dimensions (VRM)	Dim - VRM Segment
Budgetary Control	Budgeting (XCC)	Dim - XCC Segment

## Map Non-Qualified Segments to BI Objects

To map non-qualified segments that must be mapped and used in analysis, create a new label and associate a BI object with the label. Associate this new segment label with the segment code.

To map non-qualified segments to BI objects:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. On the Manage Key Flexfields page, search for the appropriate key flexfield code.
3. From the Actions menu, select **Manage Segment Labels**.
4. Click the **Add Row** icon.
5. Enter the details for the Segment Label Code, including name, description, and BI Object name. Enter the BI object names carefully and note whether there is a space between **Segment** and the number.

This table provides examples of Key Flexfields and associated BI object names.

Key Flexfield	BI Object Name
Accounting (GL)	Dim - GL Segment1 through Dim - GL Segment10
Budgetary Control (XCC)	Dim - XCC Segment1 through Dim - XCC Segment10
Revenue Management (VRM)	Dim - VRM Segment 1 through Dim - VRM Segment 10

6. Complete the mapping by assigning unique segment labels to the key flexfields.

## Set Up the GL Accounting Flexfields

This topic describes the workflow for setting up Accounting key flexfields, but these steps also apply for other key flexfields.

- Understanding Accounting Key Flexfields

- Identifying Accounting Key Flexfields
- Assigning Unique Segment Labels
- Performing Column Flattening
- Designating GL Accounting Segment Instances as BI-Enabled
- Deploying Accounting Key Flexfields

## Understanding Accounting Key Flexfields

The Accounting Key Flexfield is used to identify GL accounts.

A chart of accounts segment is a component of the accounting key flexfield. Each segment has a value set attached to it to provide formatting and validation of the set of values used with that segment. The combination of segments creates the account combination used for recording and analyzing financial transactions. You must set up your Chart of Accounts (COA) as part of implementing Oracle Applications Cloud.

Examples of segments that may be found in a chart of accounts structure include Company, Cost Center, Department, Division, Region, Account, Product, Program, and Location.

The Natural Account segment of the General Ledger Accounting Key Flexfield defines the account used in the account combination to record transactions.

The logical segment dimensions in the Oracle BI metadata are `Dim - Cost Center`, `Dim - Balancing Segment`, `Dim - Natural Account Segment` and all `Dim - GL Segmentn` dimensions. These dimension tables are populated from a Tree value object or from a Value Set value object. Which value is used depends on whether a tree was associated with the segment in the Oracle Applications Cloud setup:

- For each segment associated with trees, two value objects are generated (Tree and TreeCode) with the following naming structure:

```
FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_segmentlabel_VI &
```

```
FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_segmentlabel_VI
```

- For each segment without trees, one view object is generated with the following naming structure:

```
FscmTopModelAM.AccountBIAM.FLEX_VS_XXX_VI
```

In addition to the segment dimension tables, the BI Extension process also extends `Flex BI Flattened VO`; `FscmTopModelAM.AccountBIAM.FLEX_BI_Account_VI`. This view object has a pair of columns for each segment; `segmentlabel_` and `segmentlabel_c`.

For example, for your Cost Center segment which has the segment label `FA_COST_CTR`, there are two columns in this view object, named `FA_COST_CTR_` and `FA_COST_CTR_c`.

## Identifying Accounting Key Flexfield Segments

Identify and map segments of the chart of accounts.

For each Chart of Accounts (Accounting Key Flexfield) used to analyze Transactional Business Intelligence facts, identify the segments of the chart of accounts. Map them to the Transactional Business Intelligence GL Accounting Segment logical dimensions.

Accounting Key Flexfield Segment	Segment Label	Transactional Business Intelligence GL Accounting Segment Logical Dimension
Balancing	GL_BALANCING	Dim - Balancing Segment
Natural Account	GL_ACCOUNT	Dim - Natural Account Segment
Cost Center	FA_COST_CTR	Dim - Cost Center
Other segments to be equalized across the charts of accounts	Other unique segment label	Dim - GL Segment n where n is an integer from 1 to 10

## Assigning Unique Segment Labels

You must assign a unique segment label to the charts of accounts segments that are the balancing segments or the natural account segments. The segments must be also used for specific purposes.

For example, assign the Primary Balancing segment label to the segment used for your company or legal entities. That label provides a correct recording of intercompany transactions and company analysis. You can assign other segment labels when required.

To assign unique segment labels to charts of accounts segments:

1. In the Setup and Maintenance work area, go to the **Manage Charts of Accounts** task and then navigate to the Manage Chart of Accounts page.
2. In the Search section, enter the GL# for the **Key Flexfield Code** and click the **Search** button.
3. In the Search Results section, select **Accounting Flexfield** and click the **Manage Structures** button to navigate to Manage Key Flexfield Structures.
4. In the Search section, enter the chart of accounts code or the name for Structure Code or Name and click the **Search** button.
5. In the Search Results section, select the chart of accounts and click **Edit** to navigate to the Edit Key Flexfield Structure window
6. Select the **Enabled** check box to code-enable the Structure code.
7. In the Segments section, select the applicable segments and click **Edit** to navigate to the Edit Key Flexfield Segment window.
8. Select the Enabled check box to enable the segments.
9. In the Segment Labels section, select the unique segment labels to equalize the segments across the charts of accounts. Click the **shuttle** to move the segments to the selected list.
10. Click **Save and Close** to return to the Edit Key Flexfield Structure window.
11. Click **Done** to return to the Manage Key Flexfields window.

## Performing Column Flattening

Column flattening of trees is required in order for OTBI hierarchy analyses to be populated with correct data.

To flatten columns for account hierarchies:

1. In the Setup and Maintenance work area, go to the **Manage Trees and Tree Versions** task and navigate to the Manage Trees and Tree Versions window.

2. In the Search section, enter **GL\_ACCT\_FLEX** for the Tree Structure Code and the involved tree code or name, and click **Search**.
3. In the Search Results section, select the tree version you want to flatten. If the status of the Tree Version is Draft, to make the Tree Version active, select **Actions**, then **Status**, and then **Active**.
4. (Optional): After the tree version is specified, perform an audit on the Tree Version to ensure its integrity before launching the flattening job. Select **Actions** and then **Audit**. See the section on working with Trees in the Developer's Guide.
5. Choose **Column Flattening** from the **Actions** menu.
6. Click the **Online Flattening** button to launch the flattening job immediately. Or, click the **Schedule Flattening** button to schedule the flattening job according to your requirements.

## Designating GL Accounting Segment Instances as BI-Enabled

Specify the applicable chart of accounts segment instances that are BI-enabled to make them available for use in Transactional Business Intelligence.

To specify the chart of accounts segment instances as BI-enabled:

1. In the Search Results section of the Manage Key Flexfields window, select **Accounting Flexfield** and click the **Manage Structure Instances** button to navigate to the Manage Key Flexfield Structure Instances window.
2. In the Search section, select the chart of accounts for Structure Name and click the **Search** button.
3. In the Search Results section, select the structure instance and click **Edit** to navigate to the Edit Key Flexfield Structure Instance window.
4. Check the **Enabled** check box to code-enable the structure instance.
5. In the Segment Instances section, select the segment instances and click **Edit** to update. Each of the segment instances must be selected individually.
6. Select the **Business Intelligence enabled** check box in the Edit Key Flexfield Segment pop-up window and click **OK** to return to Edit Key Flexfield Structure Instance window.
7. After you have enabled all applicable segment instances for Business Intelligence, click **Save and Close** to save the changes and return to the Edit Key Flexfield Structure Instance window.
8. Repeat steps 2 - 6 for each chart of accounts to enable all the applicable segment instances for Business Intelligence.
9. Click **Done** to return to the Manage Key Flexfields window.
10. After you have configured all the charts of accounts, click the **Deploy Flexfield** button to deploy the Accounting Flexfield and make the latest definition available for use.

## Deploying Accounting Key Flexfields

After you have set up accounting key flexfields, you must deploy them.

Accounting key flexfields have one of the following deployment statuses:

- Edited: The flexfield definition has not been deployed or changes have been made to the structure, the structure instances, or the value sets.
- Patched: The flexfield definition has been modified through an update, but the flexfield has not yet been deployed so the updated definition is not reflected.
- Deployed to Sandbox: The flexfield is deployed and available in a flexfield-enabled sandbox.
- Deployed: The flexfield definition is deployed and available to end users.
- Error: The deployment attempt failed.

To deploy accounting key flexfields:

1. In the Setup and Maintenance work area, go to the **Manage Chart of Accounts** task.

2. Click **Search**.
3. Locate the Deployment Status column.
4. Click the icon.
5. Select **Edited**.
6. Click **Deploy Flexfield**.
7. Monitor the Deployment Status and when it reaches 100% click **OK**.
8. Verify that a check mark displays in the Deployment Status column.
9. Click **Done**.

## Configure Descriptive Flexfields for Transactional Business Intelligence

### Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields

Configure descriptive flexfields to track unique information not typically found on business forms.

Descriptive flexfields can store several important details on a form without cluttering it. For example, several details may make an asset form heavy and unmanageable. However, the user still needs to access those details and therefore, they must be present on the form. In such cases, descriptive flexfields are convenient to use and are easy to manage.

Descriptive flexfields provide a way for you to add attributes to entities and to define validation and display properties for them. A descriptive flexfield is a logical grouping of attributes (segments) that are mapped to a set of extension columns which are shipped as part of Oracle Applications Cloud tables.

#### *Related Topics*

- [Configure Descriptive Flexfield Segments](#)
- [Set Descriptive Flexfields as BI-Enabled](#)

## Configure Descriptive Flexfield Segments

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

### Configuring a Descriptive Flexfield Segment

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

To configure available descriptive flexfield segments:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.

2. If the **BI Enabled** option is cleared, select it.
3. Select the options for deployment of the descriptive flexfields.

### Related Topics

## Set Descriptive Flexfields as BI-Enabled

If a descriptive flexfield is already defined, you can enable it for use in Business Intelligence reports. Not all descriptive flexfields are supported for Business Intelligence.

### Setting a Flexfield as BI-Enabled

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. Navigate to the **Edit Descriptive Flexfields** window.
3. Enter the descriptive flexfield name.
4. Check the **BI Enabled** option on the desired descriptive flexfields. If the option is unavailable, the flexfield is a non-supported entity.
5. Click **OK**.
6. Click **Save**.

## Configure Extensible Flexfields for Transactional Business Intelligence

### Configure Extensible Flexfields

You can use extensible flexfields to configure more segments.

An extensible flexfield is similar to a descriptive flexfield in that it provides an expansion space that you can use to configure additional attributes (segments) without additional programming. As with descriptive flexfields, each segment is represented in the database as a single column. However, with extensible flexfields, the context values and context-sensitive segments are stored in an extension table.

### Categories and Contexts

You can combine and arrange the segments into attribute groups that are tailored to your specific needs. For example, you can group related segments so that they appear together on the page. The attribute groups are referred to as contexts. You can optionally set up an extensible flexfield to enable categorization of contexts.

You can add contexts and segments to extensible flexfields just like the descriptive flexfields. To see the extensible flexfields in analyses, you need to deploy them and then run the BI Extender Essbase scheduled process.

### Configure Extensible Flexfields

To configure extensible flexfields:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfield** task.
2. Search for the EFF you want to configure, then select it and click the **Edit** icon.
3. In the Edit Extensible Flexfield dialog, highlight the category Display Name, then select **Manage Contexts**.
4. In the Manage Context dialog, search for the context that contains the segment you want to configure, highlight it, then click the **Edit** icon.
5. In the Edit Context dialog, click the **Edit** icon.
6. Edit the segment, as required, then click **Save**.

*Related Topics*

- [Flexfield Usages](#)

## Set Extensible Flexfields as BI-Enabled

Extensible flexfields are BI enabled if at least one segment in a context is BI enabled.

### Setting Extensible Flexfields as BI-Enabled

To set extensible flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfields** task.
2. Enter the extensible flexfield name; for example, **Organization Information EFF**.
3. Select the applicable extensible flexfield, and then click **Edit**.
4. Select the applicable Category. The category contexts are populated automatically.
5. Click **Manage Contexts**
6. In the Edit Context page, select the applicable Context, and then click **Edit**.
7. Select the applicable Segment, and then click **Edit**.
8. In the Edit Segment page, select the **BI Enabled** check box.
9. Click **Save**.

*Related Topics*

- [Configure Extensible Flexfields](#)

## Overview of the Essbase Rule File and Cubes

Generate the Essbase rule file by running the Create Rules XML File for BI Extender Automation scheduled process.

The Essbase rule file must be generated for all Oracle Essbase cubes mapped in the repository file (RPD).

### Job Status Conditions

The process status displays one of these conditions.

- **INIT:** The process has just begun and is waiting for the extender command line JAR to update the status with more details.
- **COMPLETED\_NO\_EXTENSION\_NEEDED:** No new Flexfield changes were detected in any of the Oracle Applications Cloud sources; because the RPD is already synchronized with all Flexfield changes, no changes were made in the RPD.
- **COMPLETED:** The RPD was successfully updated with Flexfield changes and uploaded into the Oracle Business Intelligence server.
- **FAILED:** Error conditions exist which require manual intervention.

#### *Related Topics*

- [Submit Scheduled Processes and Process Sets](#)

## Import Changes to Flexfields Automatically

### Import Flexfield Changes Automatically

To import flexfield changes, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process. Running the process disconnects all users from the server. Don't run this process when maintenance operations or updates are being performed on the server.

### Running the Process

To run the process:

1. In the **Scheduled Processes** window, select **Search and Select: Name**.
2. Select **Search and Select: Name**.
3. Highlight **Import Oracle Fusion Data Extensions for Transactional Business Intelligence**.
4. Click **OK**.
5. Schedule to run the process.

### Process Status Conditions

The process status displays one of the following conditions:

- **INIT:** The process has just begun and is waiting for the extender command line JAR to update the status with more details.
- **COMPLETED\_NO\_EXTENSION\_NEEDED:** No new flexfield changes were detected in any of the Oracle Applications Cloud sources; because the Oracle Business Intelligence is already synchronized with all flexfield changes, no changes were made in the Oracle Business Intelligence.
- **COMPLETED:** Oracle Business Intelligence was successfully updated with flexfield changes and uploaded into the Oracle Business Intelligence Server.



- **COMPLETED: PROCESS\_ERRORS:** Oracle Business Intelligence was updated with the flexfield changes but with some warnings that require manual intervention.
- **FAILED:** Error conditions exist that require manual intervention.

## Successful Import Process

If the import process is successful, you can perform the following actions:

- Query subject areas by segment dimensions such as Balancing Segment and Cost Center.
- Access DFF attributes for analyses.
- Use the General Ledger - Balances Real Time subject area to query Oracle Essbase cubes.

# Disable Flexfields as BI-Enabled

## Overview of Flexfield BI-Disablement

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

There may be times, such as during development phases, when you try using a flexfield and later determine it is no longer needed.

**Note:** If you are considering disabling flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence. If you disable a flexfield, it cannot be deployed. Also, error conditions may occur if you disable a descriptive flexfield that has been implemented in BI Applications. If error conditions arise from disabling flexfields as BI-enabled, troubleshooting the errors can be difficult and time-consuming.

### Related Topics

- [Disable Key Flexfields as BI-Enabled](#)
- [Disable Descriptive Flexfields as BI-Enabled](#)
- [Disable Extensible Flexfields as BI-Enabled](#)

## Disable Key Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling key flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence.

### Disabling Key Flexfields

To disable key flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. Enter your search value in **Key Flexfield Code**.
3. Click **Manage Structure Instances**.
4. Enter your search value in **Structure Instance Code**.
5. Click **Edit**. The Edit Key Flexfield Structure Instance dialog box displays.
6. In **Edit Key Flexfield Segment Instance**, deselect the **BI Enabled** option.
7. Click **OK**, then **Save**.

## Disable Descriptive Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling descriptive flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence.

### Disabling Descriptive Flexfields

To disable descriptive flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. Enter the **Descriptive Flexfield Name**.
3. Deselect the **BI Enabled** option on the desired descriptive flexfields.
4. Click **OK**, then **Save**.

## Disable Extensible Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling extensible flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Oracle Transactional Business Intelligence.

### Disabling Extensible Flexfields

To disable extensible flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfields** task.
2. Enter the extensible flexfield Name; for example, "Organization Information EFF."
3. Select the applicable extensible flexfield and click **Edit** to navigate to Edit Extensible Flexfield.
4. Select the applicable Category. The category contexts are populated automatically.
5. Click **Manage Contexts** to navigate to Manage Contexts.
6. Select the applicable Context and click **Edit** to navigate to Edit Context.
7. Select the applicable Segment and click **Edit** to navigate to Edit Segment.
8. Deselect the **BI Enabled** option.

9. Click **Save**.

## Dimensions Supported by Descriptive Flexfields

### Descriptive Flexfields for Project Management

The table below lists the descriptive flexfields and the subject areas in which you can use these flexfields. To view the descriptive flexfield columns, navigate to the appropriate folder within the relevant subject area.

Flexfield	Subject Area	Folder
PJB_INVOICE_HEADERS_FLEX	Project Billing - Invoices Real Time	Invoice Details
PJB_INVOICE_LINES_FLEX	Project Billing - Invoices Real Time	Invoice Details
PJB_BILLING_EVENTS_FLEX	<ul style="list-style-type: none"> <li>Project Billing - Event Real Time</li> <li>Project Billing - Invoices Real Time</li> <li>Project Billing - Revenue Real Time</li> </ul>	Event Details
PJC_EXP_ITEMS_DESC_FLEX	<ul style="list-style-type: none"> <li>Project Costing - Actual Costs Real Time</li> <li>Project Costing - Expenditure Item Performance - Real Time</li> </ul>	For Actual Costs: <ul style="list-style-type: none"> <li>Expenditure Item and Cost Distribution Details</li> </ul> For Expenditure Item Performance: <ul style="list-style-type: none"> <li>Expenditure Item Details</li> </ul>
PROJECTS_STD_COST_COLLECTION	<ul style="list-style-type: none"> <li>Project Costing - Actual Costs Real Time</li> <li>Project Costing - Expenditure Item Performance - Real Time</li> </ul>	For Actual Costs: <ul style="list-style-type: none"> <li>Expenditure Item and Cost Distribution Details</li> </ul> For Expenditure Item Performance: <ul style="list-style-type: none"> <li>Expenditure Item Details</li> </ul>
PJC_TXN_XFACE_DESC_FLEX	Project Costing - Unprocessed Transactions Real Time	Unprocessed Transaction Details
PJF_EXP_CATEGORIES_DESC_FLEX	<ul style="list-style-type: none"> <li>Project Billing - Invoices Real Time</li> <li>Project Costing - Actual Costs Real Time</li> <li>Project Costing - Commitments Real Time</li> <li>Project Costing - Expenditure Item Performance - Real Time</li> <li>Project Costing - Unprocessed Transactions Real Time</li> <li>Project Costing - Assets Real Time</li> </ul>	Expenditure Type

Flexfield	Subject Area	Folder
PJF_EXP_TYPES_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Invoices Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Project Costing - Assets Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	Expenditure Type
PJF_NONLAB_RES_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> </ul>	Nonlabor Resource
PJF_PROJECTS_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Control - Forecasts Real Time</li> <li>• Project Control - Financial Project Plans Real Time</li> <li>• Project Control - Progress Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Project Costing - Assets Real Time</li> <li>• Project Management - Change Management Real Time</li> <li>• Project Management - Opportunity Integration Real Time</li> <li>• Project Management - Planning Real Time</li> <li>• Project Management - Project Hierarchy Real Time</li> <li>• Project Management - Project Resources Real Time</li> </ul>	Project

Flexfield	Subject Area	Folder
	<ul style="list-style-type: none"> <li>• Project Management - Project Work Items Real Time</li> <li>• Project Management - Requirements Real Time</li> <li>• Project Management - Task Management Real Time</li> <li>• Project Management - Baseline Versions Real Time</li> <li>• Project Resource Management - Resource Management Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Analysis Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> <li>• Projects - Performance Reporting Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	
PJF_PROJECT_TYPES_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Control - Forecasts Real Time</li> <li>• Project Control - Financial Project Plans Real Time</li> <li>• Project Control - Progress Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Project Costing - Assets Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Analysis Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> </ul>	Project Type Attributes

Flexfield	Subject Area	Folder
	<ul style="list-style-type: none"> <li>• Projects - Performance Reporting Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	
PJF_TASK_STRUCTURE_DFF	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Control - Forecasts Real Time</li> <li>• Project Control - Financial Project Plans Real Time</li> <li>• Project Control - Progress Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Project Costing - Assets Real Time</li> <li>• Project Management - Planning Real Time</li> <li>• Project Management - Project Work Items Real Time</li> <li>• Project Management - Requirements Real Time</li> <li>• Project Management - Task Management Real Time</li> <li>• Project Management - Baseline Versions Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Performance Reporting Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	Task
PJF_TASK_STRUCTURE_DFF	<ul style="list-style-type: none"> <li>• Project Costing - Assets Real Time</li> </ul>	Asset Task
PJF_TASK_STRUCTURE_DFF	<ul style="list-style-type: none"> <li>• Project Costing - Assets Real Time</li> </ul>	Asset Line Task

Flexfield	Subject Area	Folder
PJF_TASK_STRUCTURE_DFF	<ul style="list-style-type: none"> <li>Project Billing - Event Real Time</li> <li>Project Billing - Invoices Real Time</li> <li>Project Billing - Revenue Real Time</li> </ul>	Associated Task
PJF_WORK_TYPES_DESC_FLEX	<ul style="list-style-type: none"> <li>Project Costing - Actual Costs Real Time</li> <li>Project Costing - Commitments Real Time</li> <li>Project Costing - Expenditure Item Performance - Real Time</li> <li>Project Costing - Unprocessed Transactions Real Time</li> <li>Projects - Labor Distribution Cost Analysis Real Time</li> <li>Projects - Labor Schedule Analysis Real Time</li> </ul>	Work Type
PJO_PLANNING_OPTIONS_DFF	Project Control - Budgets Real Time	Budget Version Planning Options
PJO_PLANNING_OPTIONS_DFF	Project Control - Forecasts Real Time	Forecast Version Planning Options
PJO_PLANNING_OPTIONS_DFF	Project Control - Financial Project Plans Real Time	Descriptive Flexfields
PJO_PLAN_LINES_DFF	Project Control - Budgets Real Time	Budget Line Record Information
PJO_PLAN_LINES_DFF	Project Control - Forecasts Real Time	Forecast Element Details
PJO_PLAN_LINES_DFF	Project Control - Financial Project Plans Real Time	Descriptive Flexfields
ContractHeaderFlexfield	<ul style="list-style-type: none"> <li>Project Billing - Event Real Time</li> <li>Project Billing - Funding Real Time</li> <li>Project Billing - Invoices Real Time</li> <li>Project Billing - Revenue Real Time</li> <li>Project Costing - Actual Costs Real Time</li> <li>Project Costing - Expenditure Item Performance - Real Time</li> <li>Projects - Cross Subject Area Analysis - Real Time</li> <li>Projects - Grants Management - Award Funding Real Time</li> <li>Projects - Labor Distribution Cost Analysis Real Time</li> <li>Projects - Labor Schedule Analysis Real Time</li> </ul>	Project Contract Header Details

Flexfield	Subject Area	Folder
ContractHeaderFlexfield	Project Costing - Actual Costs Real Time	Associated Project Contract Header Details
OKC_LINES_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> </ul>	Project Contract Line Details
OKC_LINES_DESC_FLEX	Project Costing - Actual Costs Real Time	Associated Project Contract Line Details
PJB_BILL_PLANS_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> </ul>	Contract Line Billing Details
PJB_BILL_PLANS_DESC_FLEX	Project Costing - Actual Costs Real Time	Associated Contract Line Billing Details
PJF_CLASS_CATEGORIES_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Control - Forecasts Real Time</li> <li>• Project Control - Financial Project Plans Real Time</li> <li>• Project Control - Progress Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> </ul>	Project Classification



Flexfield	Subject Area	Folder
	<ul style="list-style-type: none"> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Project Costing - Assets Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Analysis Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> <li>• Projects - Performance Reporting Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	
PJF_CLASS_CODES_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Control - Forecasts Real Time</li> <li>• Project Control - Financial Project Plans Real Time</li> <li>• Project Control - Progress Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Project Costing - Assets Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Analysis Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> <li>• Projects - Performance Reporting Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	Project Classification
PJF_PROJECT_CLASS_CODE_DESC_FLEX	<ul style="list-style-type: none"> <li>• Project Billing - Event Real Time</li> </ul>	Project Classification

Flexfield	Subject Area	Folder
	<ul style="list-style-type: none"> <li>• Project Billing - Funding Real Time</li> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Control - Forecasts Real Time</li> <li>• Project Control - Financial Project Plans Real Time</li> <li>• Project Control - Progress Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Expenditure Item Performance - Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Project Costing - Assets Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Analysis Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> <li>• Projects - Performance Reporting Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	
GMS_AWARD_PERSONNEL_DFF	Projects - Grants Management - Award Funding Real Time	Personnel
GMS_AWARD_PROJECTS_DFF	Projects - Grants Management - Award Funding Real Time	Award Project
GMS_INSTITUTIONS_DFF	<ul style="list-style-type: none"> <li>• Project Billing - Invoices Real Time</li> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> </ul>	Institution
GMS_AWARD_HEADERS_DFF	<ul style="list-style-type: none"> <li>• Project Billing - Invoices Real Time</li> </ul>	Award

Flexfield	Subject Area	Folder
	<ul style="list-style-type: none"> <li>• Project Billing - Revenue Real Time</li> <li>• Project Control - Budgets Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Projects - Grants Management - Award Analysis Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	
GMS_FUNDING_SOURCES_DFF	<ul style="list-style-type: none"> <li>• Project Control - Budgets Real Time</li> <li>• Project Costing - Actual Costs Real Time</li> <li>• Project Costing - Commitments Real Time</li> <li>• Project Costing - Unprocessed Transactions Real Time</li> <li>• Projects - Cross Subject Area Analysis - Real Time</li> <li>• Projects - Grants Management - Award Funding Real Time</li> <li>• Projects - Labor Distribution Cost Analysis Real Time</li> <li>• Projects - Labor Schedule Analysis Real Time</li> </ul>	Award Funding Source
PJR_RESOURCE_REQUEST_DFF	Project Resource Management - Resource Management Real Time	Project Request Details



# 5 Analyses, Reports, and Dashboards Modification

## Create and Modify Analyses and Dashboards

You can edit and create your own OTBI analytics on your transactional data. The predefined analyses and dashboards help answer many of your business questions. But you can also create your own OTBI analyses and dashboards to meet your requirements.

**Note:** You can't use Direct Database Query in your analysis. Direct Database Query isn't supported in SaaS OTBI. To create a direct database SQL report, you can create a Analytics Publisher SQL data model and then create a report.

This table lists a few examples.

Task	Example
Create an analysis	Your team needs a simple list of all your accounts, sorted by account ID. You include the account name, ID, and address in a new analysis, and sort the ID column.
Create a view	A predefined analysis has a bar graph. You save a new version of the analysis with a table view added to the graph.
Create a view selector	You later decide you want to toggle between viewing a table and a graph. You add a view selector that includes the table and graph views.
Edit a dashboard prompt	A predefined dashboard has a Start Date prompt. You make a copy of the dashboard and replace Start Date with a date range prompt.
Create a dashboard	You create a dashboard that includes an analysis and a report, which you can view together. You also add a dashboard prompt to filter both the analysis and the report.

**Tip:** When you create or edit analyses, you can use a wizard in the Reports and Analytics work area and panel tab.

## Flexfield Attributes

Administrators can modify the business intelligence (BI) repository to determine the columns available for you to use in analyses.

- They enable flexfields (which support attributes) for BI, and import them into the repository.
- After administrators import the flexfields, you can select the flexfield attributes to include in your analyses.

### Related Topics

- [Create and Edit Analyses Using a Wizard](#)
- [Overview of Flexfield Use in Analyses](#)
- [Create and Edit Dashboards](#)
- [How Data Is Structured for Analytics](#)

## Analyses and Dashboards

### Create and Edit Analyses Using a Wizard

Use the wizards to quickly create and edit your analyses. You can use a wizard to create and edit most of your analytics, for example to select columns, add filters or views.

You can also use advanced business intelligence features to create or edit dashboards or manage analyses and other objects in the catalog.

1. Start the wizard from the Reports and Analytics work area or the Reports and Analytics panel tab (if available).
  - o To create a new analysis click **Create** and select **Analysis**. Select a subject area for your analysis and click the **Continue** button.
  - o To edit an existing analysis, in the Reports and Analytics work area, select it in a folder or the favorites list, click its ellipsis icon and select **Edit**. In the Reports and Analytics panel tab, click the analysis, then click **Edit**.
2. In the Select Columns page, optionally, click **Add/Remove Subject Areas** and, in the Add/Remove Subject Areas dialog box, select more subject areas or remove any that you no longer need, and click **OK**. You can't remove the original subject area selected for the analysis. To remove any other subject area, first remove its columns from the analysis.
3. From here on, make selections in a series of analysis-definition pages, selecting Next or Back to navigate among them.
  - o In the Select Columns page, expand your subject area and folders within it to choose the columns to include in your analysis. Also set options for those columns.
  - o In the Select Views page, determine whether your analysis is to include a table, a graph, or both. For either, select among several types. If you include both, select the order in which they appear.
  - o In Edit Table and Edit Graph pages, select options that apply to your table and graph layouts. Each of these pages is active only if you selected the item it applies to in the Select Views page.
  - o In the Sort and Filter page, optionally apply filters to columns to refine the selection of records in your analysis, and apply sorts to them to order your results.
  - o In the Highlight page, optionally add color highlights based on numeric thresholds you set.
  - o In the Save page, enter a name for the analysis, select a catalog folder to save it in, and click **Submit**.

In general, these pages are designed so that procedures for using them are readily apparent. Even so, here are some things you will want to know.

## Select Columns Page

For each column in your analysis, you select an Interaction option.

- Two of the options, Default and Drill, do the same thing: If you click on a column header, the analysis adds a column displaying values at the next hierarchical level. (For example, if you click on Control Name, the analysis adds a Control ID column.) If you click on a column value, the analysis adds the subordinate column, but also filters to display only records containing the value you clicked.
- Navigate to Transaction: If you click on a value from a column for which this option is set, the analysis presents a link to the record of an object the value applies to.

For such links to work, however, further configuration is required: You need to define paths to the records that are to be opened. If you want to use this option, you're probably better off creating the analysis in the BI Catalog. However, you can create it in the wizard, then edit it in the BI Catalog. See the topic titled Link Analyses to Application Pages.

- None: This option in effect turns the Default option off and turns nothing on. Nothing happens if you click on a value in a column for which this option is set.

For each column, you can also select a Hidden option. This prevents the analysis from displaying the column, but leaves its values available for use behind the scenes, for example in filters.

## Select Views Page

You can add a graph to your analysis only if it includes at least one column from a fact folder. (You can include a table in your analysis no matter what columns you select for it.) A fact column contains numeric values, such as counts of incidents returned by advanced controls. Other columns contain attributes of objects, such as names of advanced controls. Without numeric values, there's nothing to base a graph on.

You can create a title for the analysis in this page, but doing so is optional. You also create a name for the analysis in the Save page, and that one is required. If you create both, the analysis displays both; they don't have to be the same.

You can use a Preview option to ensure the analysis returns data you expect. Turn it on or off in this page or in subsequent wizard pages. Once it's on, the preview remains on in other wizard pages you navigate to, unless you turn it off.

## Edit Table Page

Here are the layout options you can select for tables:

- Columns: This is the default. Each column you assign this value to appears as a column in the table.
- Prompt For: In a prompt field, you select among values from the column you're configuring. For example, you would select a date if the column were Calendar Month Start Date. The table would then display only rows containing the value you selected.
- Section By: The table is divided into sections. Each value of the column you're configuring becomes a header, and the section beneath each header includes rows containing that value.
- Excluded: The column you select is no longer available to the view you're configuring. The column is hidden, and its values are unavailable for behind-the-scenes tasks such as filtering. However, the column remains available to other views in your analysis.

## Edit Graph Page

You can't apply layout options to fact columns. For other columns, graph layout options include Prompt For, Section By, and Excluded, which have the same effect as they do in tables. You can also apply these options in graphs:

- **Vary Color By:** Each value in the column you're configuring is represented by a distinct color in the graph.
- **Group By:** Values in the columns you assign this option to are combined in the graph. For example, if you select this option for the State and Calendar Month Start Date columns in a bar graph, each bar represents a particular status on a particular date.

## Highlight Page

You can use this feature only if your analysis includes at least one fact column, and you can apply it only to fact columns.

### Related Topics

- [View Analytics, Reports, and Dashboards](#)
- [Manage Analytics with Advanced Features](#)
- [Where to Save Analytics and Reports](#)
- [How Data Is Structured for Analytics](#)

# Create Analysis to View Resource Qualifications from HCM

Create a resource qualification analysis in the Reports and Analytics work area to view real-time qualifications for project resources from the Oracle Human Capital Management (HCM) application.

When you create a resource qualification analysis, you select the Resource Name and Resource Qualification columns to display the qualifications associated to the resource. Resource Name and Resource Qualification dimensions are valid for the various facts associated with the Project Resource Management - Resource Management Real Time subject area. When you use Oracle Transactional Business Intelligence (OTBI) for a cross-dimension query, OTBI selects the fact column from the implicit fact column defined for a subject area to display the result. For the Project Resource Management - Resource Management Real Time subject area, the implicit fact column defined is **# of Requests**. Hence, OTBI displays the qualifications from the requests to which the resource is associated and not from the HCM application. For the analysis to display the qualifications as defined in their HCM Talent Profile, you must add the **# of Qualifications** column that is the relevant measure.

## Creating a Resource Qualification Analysis

1. Navigate to the Reports and Analytics work area.
2. Click **Browse Catalog**.
3. From the New menu, click **Analysis**.
4. From Select Subject Area window, click **Project Resource Management - Resource Management Real Time**.
5. In the Subject Area pane, expand:
  - a. Resource folder and double-click **Resource Name**.
  - b. Qualification folder and double-click **Qualification Name**.
  - c. Project Resource Supply folder and double-click **# of Qualifications**.
6. In the Selected Columns section, from the Resource Name column criteria, click **Filter**.



7. In the New Filter window, select a resource from the Value list, and click **OK**.
8. In the Selected Columns section, from the # of Qualifications column criteria, click **Column Properties**.
9. On the Column Format tab, select the Hide check box and click **OK** to hide the # of Qualifications column in the analysis.
10. Click **Save Analysis**.
11. By default, the application selects the My Folders folder. Enter a name for your analysis, such as Resource Qualification Analysis, in the Name field.
12. Click Catalog menu.
13. Expand My Folders and open the Resource Qualification Analysis. The analysis contains the following details for your selected resources:
  - o Resource Name
  - o Qualification Name

## Add an Analysis to the Project Performance Dashboard

This example shows how to add an analysis to the Project Performance Dashboard page in the application. You need to have access to an active sandbox to add an analysis.

You can add predefined or user-defined analyses to any page that you can personalize or edit.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which analysis do you want to add to the dashboard?	Project Income Statement  <b>CAUTION:</b> Ensure that the analysis doesn't query a large number of records. If it's, then the Project Performance Dashboard page can take a long time to open after you add the analysis.
Do you have to change the layout of the page?	Yes, to a two-column layout that's wider on the right side.  <b>Note:</b> The one- or two-column layout gives enough space to properly display analyses.
Do you want all or only one view of the analysis?	All views.
Are these changes for you only, or for all users of the Project Performance Dashboard?	You only.  <b>Note:</b> If you want the changes to be viewed by all the users then you need to publish the sandbox for changes to reflect for everyone.

## Adding an Analysis

1. Open the Project Performance Dashboard.
2. Click your name in the global header and from the Administration submenu select **Edit Pages....**
3. You need to be in an active sandbox session to add an analysis. Activate a sandbox if you're not already in a sandbox session. Click **Activate Sandbox**.

If you are already in an active sandbox session, steps 3 to 7 are not required.

4. On the Manage Sandboxes window, select a sandbox and click **Set as Active**.
5. After you activate the sandbox, the application redirects you to the home page. On the Warning window, click **Yes** to continue.
6. Open the Project Performance Dashboard.
7. Click your name in the global header and from the Administration submenu select **Edit Pages....**
8. Click **Change Layout** and select the **Two columns, narrow left** option.
9. Click **Add Content** for the wider column.

The **Reports and Analytics** folder in the Add Content dialog box contains what's in the BI catalog.

10. Click through the folders in the catalog until you see the Project Financials Sample Reports folder. Click the name of the analysis in this folder, and click **Add** to include all views of the analysis.

If you click **Open** or **Project Income Statement**, you can select a specific view to add.

11. Click **Close** after you see the analysis added to the top of the wider column on the dashboard.
12. Click **Close** to close the composer view and view the dashboard.

## Reports

### Overview of Analytics Publisher

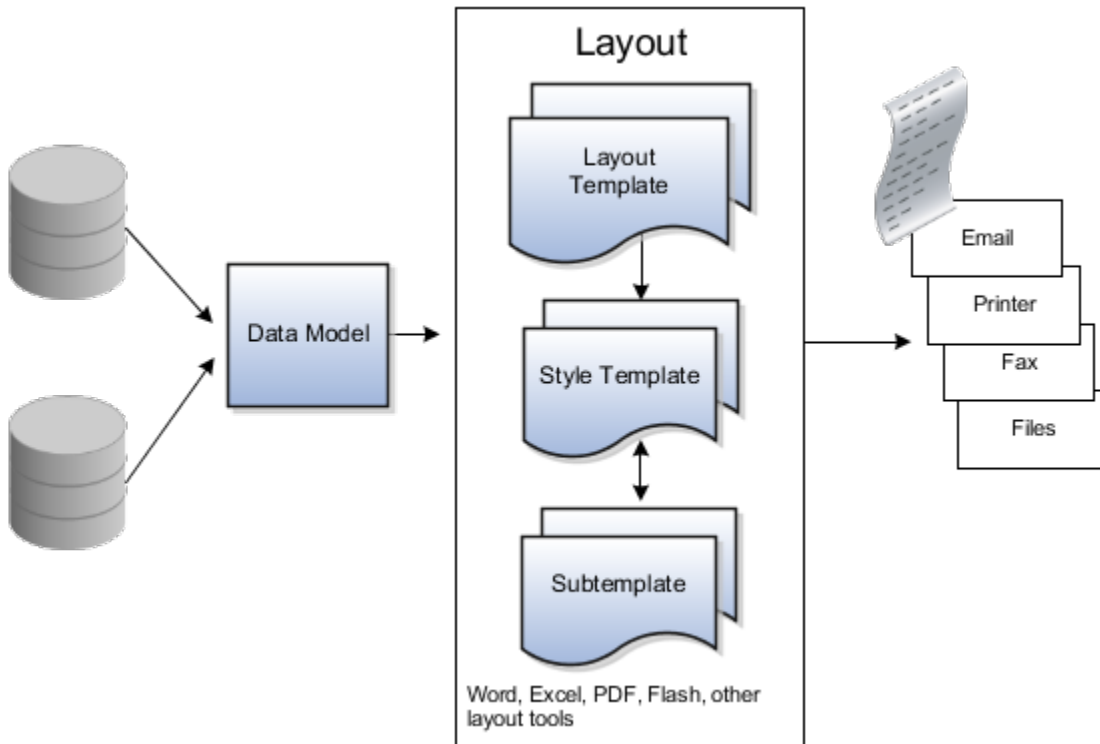
Oracle Analytics Publisher enables you to author, generate, and deliver all types of highly formatted documents and operational reports.

You can use familiar office desktop tools to create rich text format (.rtf) documents and reports against any data source. You can view reports, schedule them to run, and distribute them to predefined destinations.

Reports consist of one or more .rtf layouts, a reference to a data model, and a set of properties. A report may also include style templates and subtemplates, which allow reusability of functionality and maintain consistency of design. In the logical architecture depicted in the figure, the report includes a data model and a layout, and the layout references two style templates in the catalog which in turn reference subtemplates.

In the Analytics Publisher logical architecture, the data model accesses data sources and the layout and its optional style template and subtemplates determine the formatting of the report output, which can include email, print, fax, or files, and others. The layout is designed using common office

applications, for example Microsoft Word and Excel and Adobe Acrobat and Flash, among others.



## How You Access and Modify Report Components

To create or edit reports, you must access the business intelligence (BI) catalog. In the catalog, objects of type Report represent the report definition, which includes report properties and layouts.

Data models are separate objects in the catalog, usually stored in subfolders called Data Models.

### Accessing the BI Catalog

You can access the BI catalog in any of the following ways:

- In the Reports and Analytics work area, click **Browse Catalog** to open the BI catalog, and find your report or data model in the Folders pane.
- In the Reports and Analytics work area, find your report and select **More** to go to the report directly in the catalog. The data model associated with the report should be in the Data Models subfolder within the same folder as the report.
- Sign in to the application directly (for example: <http://host:port/analytics/saw.d11>) to open the catalog.
- Sign in to the Analytics Publisher server directly (for example: <http://hostname.com:7001/xmlpserver>) to open the catalog.
  - Alternatively, once you are in the catalog using another method, for example, through the Reports and Analytics work area, change the final node of the URL. For example, change (<http://host:port/analytics/saw.d11>) to `xmlpserver`. So the URL you use would be: <http://host:port/xmlpserver>.

## Predefined Reports

A special Customize option is available only:

- For predefined reports, not data models.
- Through direct access to the server using the `/xmlpserver` URL. When you find your report in the BI catalog, select **Customize** from the **More** menu.

The Customize option automatically creates a copy of a predefined report and stores it in the **Shared Folders > Custom** folder within the catalog. The new report is linked to the original, so that when users open or schedule the original, they are actually using the copied version.

If you don't have access to the Customize option or don't want the original version linked to the new report, make a copy of the predefined report and save it in the Custom folder.

## Predefined Data Models

Don't edit predefined data models. Instead, copy the data model into the Custom folder and edit the copy. You can't create a new data model based on the transactional tables.

### Related Topics

- [Where to Save Analytics and Reports](#)
- [What happens to modified analytics and reports when a release update is applied?](#)

## Reflect Changes from Edited Reports Sooner

When you use the Customize option to edit a predefined report, your changes won't be reflected until a refresh that happens every 24 hours. For changes to take effect sooner, use profile options to change the refresh interval.

The refresh applies your changes to Oracle Fusion Cloud Applications, but you can immediately see your changes in Microsoft Word and Oracle Analytics Publisher. For example, you download a predefined .rtf layout template and edit the file in Word. You can see the modified output using the preview in Word. After you upload the .rtf file to the catalog, you can open the report in Analytics Publisher and see your changes. But, if you're accessing the report from Fusion Applications, you see the updated output only after the refresh.

When you're done configuring and testing reports, use the same profile options to turn the refresh back to every 24 hours. But even if you don't, the refresh automatically resets to 24 hours when it's been more than 8 hours since you set the profile options. The 24-hour refresh interval helps optimize performance.

## Create Profile Options to Control the Refresh

Your profile options can apply to all workflow tasks, a product family, or a product. Based on the scope you want, your profile option must have a profile option code that follows a certain format.

Scope	Profile Option Code	Examples
Global	BIP_CLIENT_REFRESH_TIME	BIP_CLIENT_REFRESH_TIME
Product Family	BIP_CLIENT_REFRESH_TIME_<FAMILY>	<ul style="list-style-type: none"> <li>• BIP_CLIENT_REFRESH_TIME_FIN</li> </ul>

Scope	Profile Option Code	Examples
		<ul style="list-style-type: none"> <li>BIP_CLIENT_REFRESH_TIME_HCM</li> <li>BIP_CLIENT_REFRESH_TIME_PRC</li> <li>BIP_CLIENT_REFRESH_TIME_PRJ</li> <li>BIP_CLIENT_REFRESH_TIME_SCM</li> </ul>
Product	BIP_CLIENT_REFRESH_TIME_<FAMILY>_<PRODUCT>	<ul style="list-style-type: none"> <li>BIP_CLIENT_REFRESH_TIME_FIN_AP</li> <li>BIP_CLIENT_REFRESH_TIME_HCM_PER</li> <li>BIP_CLIENT_REFRESH_TIME_PRC_PON</li> <li>BIP_CLIENT_REFRESH_TIME_PRJ_PJE</li> <li>BIP_CLIENT_REFRESH_TIME_SCM_EGO</li> </ul>

The profile options with a smaller scope take precedence. For example, you have profile option A with a global scope and profile option B with a product scope. If you're currently configuring notifications for a particular product, use profile option B to adjust the refresh time just for that product. But based on profile option A, the refresh is still at 24 hours for all other configurable notifications in all other products. Profile option B takes precedence over profile option A only for that one product.

**Tip:** To find the product family or product code, go to the Setup and Maintenance work area. Use the **Manage Taxonomy Hierarchy** task in the Application Extensions functional area for any offering. In the hierarchy, expand the root node and then the Oracle Fusion node. Find the row for the family or product and look in the **Module Key** column for the code.

Now you're ready to create your profile options!

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Profile Options** task in the Application Extensions functional area for your offering.
2. On the Manage Applications Core Profile Options page, click the **New** icon.
3. On the Create Profile Option page, enter the profile option code in the format that corresponds to the scope you want.
4. Enter a display name that you can easily remember to help you find the profile option later.
5. From the **Application** list, select **Oracle Middleware Extensions for Applications**.
6. From the **Module** list, select **Application Core**.
7. Specify a start date.
8. Click **Save and Close**.
9. On the Manage Applications Core Profile Options page, make sure that your new profile option is selected in the Search Results: Profile Options subsection.
10. In the <Profile Option>: Profile Option Levels subsection, select the **Enabled** and **Updatable** check boxes for the Site level.
11. Save your work.

## Set the Refresh Interval

In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area. Set your profile option at the Site level and enter 15 or higher for the refresh interval in minutes. If you enter 15, your changes are reflected in Fusion Applications 15 minutes after they're saved in the BI catalog. For example, 15 minutes after you upload an edited .rtf layout template to the catalog, or after you update report properties in Analytics Publisher.

**CAUTION:** Make sure to enter a whole number.

When you're done making and testing your changes, set the profile option back to 1440, which is 24 hours in minutes. If you forget and leave your profile option as is for longer than 8 hours, don't worry! At that point, the profile option resets itself back to 1440 minutes.

*Related Topics*

- [How do I update existing setup data?](#)
- [Set Profile Option Values](#)
- [Modules in Application Taxonomy](#)

## Change the Branding Logo in a Predefined Project Performance Reporting RTF Report Template

The Update Project Performance Data report layout includes a standard Oracle logo in the report header. You want to replace the Oracle logo with your own logo.

The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
What version of Microsoft Word are you using?	Microsoft Word 2007
What image do you want to use as your logo?	O_FusionApps_ProjectPortfolioMgmt_clr.gif
Which data model do you need to download sample report data from?	SummarizationDM
Do you want to preview the changed template?	Yes

### Prerequisite

1. Install the Template Builder for Word add-in, and download sample data (save it locally).

### Changing the Logo

To change the logo in the report output:

1. Select the Update Project Performance Data Execution Report in the BI catalog and click **Edit**.
2. In the report editor, click the **Edit** link of the Update Project Performance Data Execution Report layout to download the RTF file.
3. Open the RTF file in Microsoft Word.

4. In the **BI Publisher** tab, click **Sample XML** in the **Load Data** group, and select sample data that was saved from the data model.
5. In the template, delete the Oracle logo and the text Fusion Projects and Project Performance Reporting.
6. On the **Insert** tab in the **Illustrations** group, click **Picture**.
7. Select the O\_FusionApps\_ProjectPortfolioMgmt\_clr.gif file and insert it into the Word document.
8. Resize the image if you need to.
9. If the template file includes section breaks, you must insert the new logo for each section header.
10. In the **Oracle BI Publisher** tab, in the **Preview** group, click **PDF**. You can preview the PDF output that's generated with the sample data that you loaded.

## Predefined Reports

### Process Output Reports

This topic lists the business intelligence publisher reports available in Oracle Fusion Cloud Project Management. You can use these reports to review your processed data in a predefined format and print them.

The following table lists the available process output reports.

Report Name	Report Description	Process Name	Intended User
Transaction Analysis for Project Planning Resource Assignments Report	Report that shows how a cost rate was calculated for project planning resource assignments. You can use the report to identify causes where a cost rate can't be determined, or a cost rate value is not as expected.	You can access this report directly from the OTBI catalog. It is in the folder <report location>.	Project Application Administrator
Copy Financial Task Dates from Financial Project Plan to Work Plan Execution Report	Allows submission of program to copy financial task dates from financial project plan to the project plan.	Copy Financial Task Dates from Financial Project Plan to Work Plan	Project Application Administrator
Absence Management Transfer Processing Report	Report for the process that loads new, updated, or withdrawn absence records from Oracle Absence Management to Project Execution Management.	Initiate Absence Records Transfer to Oracle Fusion Project Execution	Resource Manager
Accounting and Project Accounting Periods Close Exceptions Report	Report for the processes that close accounting or project accounting periods.  Also displays unprocessed transactions and conditions that prevent the closing of accounting or project accounting periods.	Close Accounting Period  Close Project Accounting Period  Accounting Period Close Exceptions Report  Project Accounting Period Close Exceptions Report	Project Accountant  Grants Accountant
Adjust All Expenditure Items Execution Report	Report for the process that provides a summary of the adjusted expenditure items and adjustment exceptions.	Adjust All Expenditure Items	Project Accountant  Grants Accountant

Report Name	Report Description	Process Name	Intended User
Import Awards Report	Report for the process that imports awards, award projects, award funding, and other award details from the open interface tables.  Displays the successfully imported awards and award-related objects and the awards that failed the validations.	Import Awards	Project Application Administrator Project Integration Specialist Grants Administrator
Import Awards Rejections Report	Report for the process that imports awards, award projects, award funding, and other award details from the open interface tables.  Displays details about the awards that failed the validations.	Import Awards	Project Application administrator Project Integration Specialist Grants Administrator
Billing Event Upload Error Report	Report for the process that creates contract billing events in Oracle Project Billing based on the data loaded into the open interface table.	Import Project Billing Events	Project Billing Specialist
Build New Organization Burden Multipliers Execution Report	Report for the process that adds burden multipliers for a new organization to burden schedules after the organization is added to the organization hierarchy.	Build New Organization Burden Multipliers	Project Accountant Grants Accountant
Change Project and Task Organizations Execution Report	Report for the process that reassigns all projects in one organization to a different organization, or changes the organization on a single project and optionally cascades the changes to the project tasks.  Used particularly when the enterprise is undergoing reorganization.	Change Project and Task Organizations	Business Unit Administrator
Create Periodic Capital Events Execution Report	Report for the process that groups unprocessed assets and costs for capital projects based on the in-service date, expenditure item date, and project, and then associates the groups of unprocessed assets and costs with the event period.	Create Periodic Capital Events	Project Accountant Grants Accountant
Delete Allocation Transactions Execution Report	Report for the process that deletes all transactions for a draft allocation.	Delete Allocation Transactions	Project Accountant Grants Accountant



Report Name	Report Description	Process Name	Intended User
Delete Capitalized Interest Transactions Execution Report	Report for the process that deletes the selected capitalized interest batch that's in draft success status.	Delete Capitalized Interest Transactions	Project Accountant Grants Accountant
Delete Cost Transactions Report	Report for the process that deletes rejected or all unprocessed project cost transactions in an expenditure batch.	Delete Cost Transactions	Project Accountant Project Manager
Import Asset and Asset Assignment Execution Report	Report for the process that imports all project assets and project asset assignments. You can generate a summarized or detailed report.	Import Asset Processing	Project Accountant
Generate Group Allocations Report	Report for the process that displays the output of the Generate Group Allocations process.	Generate Group Allocations	Project Accountant
Delete Unreleased Invoices Execution Report	Report for the process that deletes draft, approved, and rejected project contract invoices.	Delete Draft, Approved, and Approval Rejected Invoices	Project Billing Specialist Grants Accountant
Labor Distribution Cost Execution Report	Report for the process that imports payroll costs to be distributed based on labor schedules.  Displays the payroll costs that succeeded or had exceptions during distribution or were rejected during import.	Import Payroll Costs	Labor Distribution Accountant
Labor Distribution Cost Rejections Report	Report for the process that imports payroll costs to be distributed based on labor schedules.  Displays details about the payroll costs that failed the validations	Import Payroll Costs	Labor Distribution Accountant
Labor Schedules Excel Report	Report for the process that imports project costing labor schedules.  Displays details about the labor schedules that failed the validations.	Import Assignment Labor Schedules	Project Application Administrator
Manage Project Organizations Execution Report	Report for the process that converts all hierarchical lists of organizations specified in the business unit implementation options into flat lists to enhance performance throughout the Project Financial Management application.	Maintain Project Organizations	Project Application Administrator

Report Name	Report Description	Process Name	Intended User
Generate Borrowed and Lent Amounts Execution Report	Report for the process that creates borrowed and lent distributions for cross-charge transactions within a legal entity.	Generate Borrowed and Lent Amounts: Generate Output Report	Project Accountant Grants Accountant
Export Invoice Data Report	Report for the process that exports released project contract invoice details to third-party receivables applications.	Export Invoice Details	Project Billing Specialist
Export Revenue Data Report	Report for the process that exports project contract revenue distributions to third-party general ledger applications.	Export Revenue Details	Project Billing Specialist
Federal Financial Report	Federal report that tracks the summary transactions for an award, the amount spent or received, and the outstanding obligation amount.	Generate Federal Financial Report	Grants Administrator
Oracle Fusion Projects Coexistence Cross-Charge Data Report	Report for the process that extracts cross-charge distributions for accounting in third-party applications. The export status of such cross-charge distributions is updated in the application.	Extract Cross-Charge Distributions for External Accounting	Project Accountant
Oracle Fusion Projects Coexistence Data Output Report	Report for the process that extracts cost distributions for accounting in third-party applications. The export status of such cost distributions is updated in the application.	Extract Cost Distributions for External Accounting	Project Accountant
Generate Allocations Execution Report	Report for the process that generates an allocation for the specified allocation rule.	Generate Allocations	Project Accountant Grants Accountant
Generate Asset Lines Execution Report	Report for the process that creates summarized asset lines for capital assets and retirement adjustment assets based on the asset line grouping method defined for the project.	Generate Asset Lines	Project Accountant Grants Accountant
Generate Burden Costs Execution Report	Report for the process that summarizes burden costs for expenditure items and then creates and processes separate expenditure items for burden costs.	Generate Burden Costs	Project Accountant Grants Accountant

Report Name	Report Description	Process Name	Intended User
Generate Capitalized Interest Transactions Execution Report	Report for the process that calculates capitalized interest and generates transactions for eligible projects and tasks.	Generate Capitalized Interest Transactions	Project Accountant Grants Accountant
Generate Financial Plan Amounts Execution Report	Report for the process that generates working versions of budgets or forecasts based on existing financial or project plans.	Generate Financial Plan Amounts	Project Manager
Generate Invoices Execution Report	Report for the process that creates invoices for project contract customers according to contractual terms.	Generate Invoices	Project Billing Specialist Grants Accountant
Generate KPI Values Execution Report	Report for the process that generates KPI values and determines overall project health status.	Generate KPI Values	Project Manager
Generate Revenue Execution Report	Report for the process that recognizes project contract revenue according to contractual terms by creating revenue distributions.	Generate Revenue	Project Accountant Grants Accountant
Grants Personnel Import Report	Report for the process that imports grants personnel and related data. Displays the list of details for the rejected and successfully imported grants personnel and related data.	Import Grants Personnel	Project Application Administrator Project Integration Specialist
Grants Personnel Import Rejections Report	Report for the process that imports grants personnel and related data. Displays the list of error details for the rejected grants personnel and related data.	Import Grants Personnel	Project Application Administrator Project Integration Specialist
Identify Cross-Charge Transactions Execution Report	Report for the process that identifies cross-charge transactions and classifies them as intercompany or borrowed and lent.	Identify Cross-Charge Transactions: Generate Output Report	Project Accountant Grants Accountant Project Billing Specialist
Import Keywords Report	Report for the process that imports keywords and related data.  Displays the list of details for the rejected and successfully imported keywords and related data.	Import Keywords	Project Application Administrator Project Integration Specialist
Import Keywords Rejections Report	Report for the process that imports keywords and related data.	Import Keywords	Project Application Administrator

Report Name	Report Description	Process Name	Intended User
	Displays the list of error details for the rejected keywords and related data.		Project Integration Specialist
Import Budget Report	Report for the process that imports budget versions from the open interface table. Displays the list of error details for the rejected budget versions.	Import Project Budgets	Project Application Administrator Project Integration Specialist
Import Costs Report	Report for the process that creates project costs and cost distributions for the cost transactions in the open interface table.	Import Costs	Project Accountant Grants Accountant
Import Cost Rejections Report	<p>Report for the process that identifies the project cost transactions which are rejected by the Import Costs process while importing transactions using the file-based data import feature and the reasons for rejection.</p> <p>The report name varies as follows based on the type of the imported transactions:</p> <ul style="list-style-type: none"> <li>• Import Project Expense Cost Rejections</li> <li>• Import Project Inventory Cost Rejections</li> <li>• Import Project Labor Costs Rejections</li> <li>• Import Project Miscellaneous Cost Rejections</li> <li>• Import Project Nonlabor Cost Rejections</li> <li>• Import Project Supplier Cost Rejections</li> </ul>	Import Costs	Project Accountant Grants Accountant
Import Financial Project Plan Report	<p>Report for the process that imports financial project plan versions from the open interface table.</p> <p>Displays the list of error details for the rejected financial project plan versions.</p>	Import Financial Project Plan	Project Application Administrator Project Integration Specialist
Import Forecast Report	Report for the process that imports forecast versions from the open interface table. Displays the list of error details for the rejected forecast versions.	Import Project Forecasts	Project Application Administrator Project Integration Specialist

Report Name	Report Description	Process Name	Intended User
Import Financial Plan Version Report	Report for the process that imports financial plan version data from the open interface table and creates financial plan versions.	Import Financial Plan Versions	Project Application Administrator Project Integration Specialist
Import Funding Sources Report	Report for the process that imports grants funding sources and related data. Displays the list of details for the rejected and successfully imported grants funding sources and related data.	Import Funding Sources	Project Application Administrator Project Integration Specialist
Import Funding Sources Rejections Report	Report for the process that imports grants funding sources and related data. Displays the list of error details for the rejected grants funding sources and related data.	Import Funding Sources	Project Application Administrator Project Integration Specialist
Import Project Budget Execution Report	Report for the process that imports budget versions from the open interface table.  Displays the list of budget versions that are imported successfully and error details for the rejected budget versions.	Budget Import Execution Report	Project Application Administrator Project Integration Specialist
Import Project Enterprise Resources Execution Report	Report for the process that imports project enterprise resources from the open interface table and creates project enterprise resources.	Import Project Enterprise Resources	Project Administrator
Import Resource Actual Hours Execution Report	Report for the process that imports resource actual hours data from the open interface or Project Costing.	Import Resource Actual Hours	Project Administrator Project Integration Specialist
Import Resource Pools and Memberships Report	Report for the process that imports resource pools and pool memberships.	Import Resource Pools and Memberships	Project Administrator Project Integration Specialist
Import Project Plan Execution Report	Report for the process that imports projects and tasks from the open interface table and creates projects and tasks.	Import Project Plan	Project Manager Project Administrator Project Integration Specialist
Import Project Rate Schedules Report	Report for the process that imports project rate schedules and associated person, job, nonlabor, and resource class rates from the open interface table.	Import Project Rate Schedules	Project Administrator

Report Name	Report Description	Process Name	Intended User
	Displays the list of project rate schedules and rates that are imported successfully and error details for the rejected rate schedules and rates.		
Import Resource Breakdown Structures Report	Report that displays the summary, exception, and success details of the Import Resource Breakdown Structures process.	Import Resource Breakdown Structures	Project Application Administrator Project Integration Specialist
Import Project Report	Report for the process that imports projects from the open interface table.  Displays the list of projects that are imported successfully and error details for the rejected projects.	Import Projects	Project Administrator Grants Administrator
Import Project Progress Report	Report for the process that imports project progress data from the open interface table and creates project progress.	Import Project Progress	Project Manager Project Application Administrator
Import Project Resource Assignments Execution Report	Report for the process that imports project resource assignment data from the open interface table and creates project resource assignments.	Import Project Resource Assignments	Resource Manager
Import Project Resource Requests Execution Report	Report for the process that imports project resource request data from the open interface table and creates project resource requests.	Import Project Resource Requests	Project Administrator
Import Project Tasks Report	Report for the process that imports project tasks from the open interface table.  Displays the list of project tasks that are imported successfully and error details for the rejected project tasks.	Import Project Tasks	Project Administrator Grants Administrator
Import Resource Actual Hours Execution Report	Report for the process that imports resource actual hours data from the open interface table and creates time transactions.	Import Resource Actual Hours	Project Administrator
Import Resource Pools and Memberships Execution Report	Report for the process that imports resource pool and pool membership data from the open interface and creates resource pools and memberships.	Import Resource Pools and Memberships	Implementation Administrator Resource Manager

Report Name	Report Description	Process Name	Intended User
Import Unassigned Asset Lines Report	Report of the process that updates the asset name on unassigned asset lines.  Displays a summary of successful transactions and errors from the import process	Import Unassigned Asset Lines	Project Accountant  Grants Accountant
Maintain Project Enterprise Labor Resources Output Report	Report for the process that imports Cloud HCM resources to create project enterprise resources.  Displays the list of resources that are imported successfully, resources exceptions, and updates made to name and email of project enterprise resources.	Maintain Project Enterprise Labor Resources	Project Application Administrator
Maintain Project Performance Data Execution Report	Report for the process that improves performance during project performance data summarization by purging unused or deleted dimension members and summaries, reordering data, merging Oracle Essbase incremental slices, and optionally deleting project performance data.	Maintain Project Performance Data	Project Application Administrator
Open Accounting and Project Accounting Periods Execution Report	Report for the processes that update the status of the accounting or project accounting periods to open.	Open Accounting Period  Open Project Accounting Period	Project Accountant  Grants Accountant
Reclassify Billing Offset Balances Execution Report	Report for the process that creates reclassification accounting transactions to effectively net the unbilled receivables and deferred revenue balances together into a single balance.	Reclassify Billing Offset Balances	Project Accountant  Grants Accountant
Recalculate Burden Cost Amounts Execution Report	Report for the process that identifies expenditure items impacted by a burden schedule version change and processes the resulting burden cost recalculation adjustments.	Recalculate Burden Cost Amounts	Project Accountant  Grants Accountant
Refresh Plan Amounts: Generate Report	Report for the process that refreshes the working versions of the financial project plan, budget, or forecast based on the existing project plan type or financial plan type rate settings.	Refresh Plan Amounts	Project Manager  Project Administrator

Report Name	Report Description	Process Name	Intended User
Release Allocation Transactions Execution Report	Report for the process that release and processes allocation and offset transactions for a draft allocation.	Release Allocation Transactions	Project Accountant
Release Capitalized Interest Transactions Execution Report	Report for the process that releases a capitalized interest batch that's in draft success status and creates expenditure items for the interest transactions.	Release Capitalized Interest Transactions	Project Accountant Grants Accountant
Reverse Allocation Transactions Execution Report	Report for the process that creates and processes transactions to reverse a released allocation.	Reverse Allocation Transactions	Project Accountant Grants Accountant
Reverse Capitalized Interest Transactions Execution Report	Report for the process that reverses a capitalized interest batch that's in released status and creates reversal transactions.	Reverse Capitalized Interest Transactions	Project Accountant Grants Accountant
Sweep Transaction Accounting Events Execution Report	Report for the process that sweeps unaccounted transactions into the next open or future-enterable accounting period so that the current period can be closed.	Sweep Transaction Accounting Events	Project Accountant Grants Accountant
Transfer Assets to Oracle Fusion Assets Execution Report	Report for the process that creates one additional line for each capital asset line or retirement cost line in Oracle Project Costing and transfers these lines to Oracle Assets to become fixed assets or group retirement reserve adjustments.	Transfer Assets to Oracle Fusion Assets	Project Accountant Grants Accountant
Transfer Invoice Details to Receivables Execution Report	Report for the process that transfers released project contract invoices to the Oracle Receivables interface tables.	Transfer Invoice Details to Receivables	Project Billing Specialist Grants Accountant
Update Asset Details from Oracle Fusion Assets Execution Report	Report for the process that identifies assets and asset lines. Updates asset number and asset period in which these assets and asset lines are posted.	Update Asset Details from Oracle Fusion Assets	Project Accountant Grants Accountant
Update Financial Project Plan and Progress Execution Report	Report for the process that generates working versions of budgets or forecasts based on existing financial or project plans.	Update Financial Project Plan and Progress	Project Manager Project Administrator
Update Invoice Details from Receivables Execution Report	Report for the process that identifies whether project contract invoices are successfully	Update Invoice Details from Receivables	Project Billing Specialist Grants Accountant



Report Name	Report Description	Process Name	Intended User
	transferred to the Oracle Receivables application, updates the receivables invoice number in the Project Financial Management application, and triggers currency conversion and summarization.		
Update Project Contract Performance Data Execution Report	Report for the process that summarizes contract revenue and billing data for project performance reporting.	Update Project Contract Performance Data	Project Manager
Update Project Performance Data Report	Report for the process that summarizes performance data for a project unit, business unit, a range of projects, or the projects managed by a project manager.  Displays the projects, contracts, awards, and project KPIs that were summarized or had exceptions during summarization.	Update Project Performance Data	Project Manager Project Administrator
Update Project Plan Data Execution Report	Report for the process that updates the project plan with summarized amounts from actual cost transactions.	Update Project Plan Data	Project Manager Project Administrator
Import Project Key Performance Indicators Report	Report for the process that imports KPIs for project templates and projects that are enabled for financial management from the open interface tables.  Displays the number of KPIs and projects that were processed, attached successfully, and not attached.	Import Project Key Performance Indicators	Project Integration Specialist Project Application Administrator
Update Resource Rates for Project Enterprise Resources Execution Report	Report for the process that updates project enterprise resource rates from resource rate schedules.	Update Resource Rates for Project Enterprise Resources	Resource Manager
Update Work Type Execution Report	Report for the process that provides a summary of the number of updated objects with work type details.  The updated objects are projects, tasks, expenditure items, and cost distributions.	Update Work Type	Project Administrator

## Accounting and Project Accounting Periods Close Exceptions Reports

This topic provides an overview of the Accounting and Project Accounting Periods Close Exceptions reports.

### Overview

You can review the unprocessed transactions and other conditions that prevent accounting or project accounting periods from being closed by using the Accounting and Project Accounting Periods Close Exceptions reports. Multiple reports are grouped under the Accounting and Project Accounting Periods Close Exceptions reports as listed below.

- Close Accounting Period Execution Report
- Close Pending Accounting Period Execution Report
- Close Project Accounting Period Execution Report
- Close Pending Project Accounting Period Execution Report
- Accounting Period Close Exceptions Report
- Project Accounting Period Close Exceptions Report

### Key Insights

These reports answer the following business questions:

- What must be done before I can close the periods?
- Are there any issues which will prevent me from closing the periods?
- Which unprocessed transactions can prevent the periods from being closed?

### Frequently Asked Questions

The following table lists the frequently asked questions about these reports.

FAQ	Answer
How do I find these reports?	<ul style="list-style-type: none"> <li>• Reports and Analytics - Shared Folders - Projects - Project Cost - Accounting</li> <li>• Cost Work Area - Tasks - Reporting</li> <li>• Revenue Work Area - Tasks - Reports</li> </ul>
How do I generate these reports?	Using the following processes: <ul style="list-style-type: none"> <li>• Close Accounting Period</li> <li>• Close Project Accounting Period</li> <li>• Accounting Period Close Exceptions Report</li> <li>• Project Accounting Period Close Exceptions Report</li> </ul>
Who uses these reports?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Accountant</li> </ul>
When do I use these reports?	When you need to close accounting or project accounting periods.
What can I do with these reports?	You can:

FAQ	Answer
	<ul style="list-style-type: none"> <li>• Confirm that the status of the accounting period has been updated to close or close pending.</li> <li>• Confirm that the status of the project accounting period has been updated to close or close pending.</li> <li>• Identify unprocessed cost transactions, unaccounted cost transactions, and transactions which exist in account payables but haven't been imported into project costing that prevent accounting and project accounting periods from being closed.</li> </ul>
What type of reports are these?	Oracle Analytics Publisher

## Process Parameters for the Reports

The following table lists the parameters you must provide for the various processes that generate these reports.

Report	Process	Process Parameters	Values
Close Accounting Period Execution Report	Close Accounting Period	<ul style="list-style-type: none"> <li>• *Ledger</li> <li>• *Processing Action</li> <li>• *Period</li> <li>• Report Style</li> </ul>	<ul style="list-style-type: none"> <li>• Ledger name from list of values</li> <li>• Accounting period close</li> <li>• Accounting period for the ledger from list of values</li> <li>• Detail</li> <li>• Summary</li> </ul>
Close Pending Accounting Period Execution Report	Close Accounting Period	<ul style="list-style-type: none"> <li>• *Ledger</li> <li>• *Processing Action</li> <li>• *Period</li> <li>• Report Style</li> </ul>	<ul style="list-style-type: none"> <li>• Ledger name from list of values</li> <li>• Accounting period close pending</li> <li>• Accounting period for the ledger from list of values</li> <li>• Detail</li> <li>• Summary</li> </ul>
Close Project Accounting Period Execution Report	Close Project Accounting Period	<ul style="list-style-type: none"> <li>• *Ledger</li> <li>• *Processing Action</li> <li>• *Period</li> <li>• Report Style</li> </ul>	<ul style="list-style-type: none"> <li>• Ledger name from list of values</li> <li>• Project accounting period close</li> <li>• Project accounting period for the ledger from list of values</li> <li>• Detail</li> <li>• Summary</li> </ul>
Close Pending Project Accounting Period Execution Report	Close Project Accounting Period	<ul style="list-style-type: none"> <li>• *Ledger</li> <li>• *Processing Action</li> <li>• *Period</li> <li>• Report Style</li> </ul>	<ul style="list-style-type: none"> <li>• Ledger name from list of values</li> <li>• Project accounting period close pending</li> </ul>

Report	Process	Process Parameters	Values
			<ul style="list-style-type: none"> <li>Project accounting period for the ledger from list of values</li> <li>Detail</li> <li>Summary</li> </ul>
Accounting Period Close Exceptions Report	Accounting Period Close Exceptions Report	<ul style="list-style-type: none"> <li>*Ledger</li> <li>*Period</li> <li>Report Style</li> <li>Transaction Category</li> </ul>	<ul style="list-style-type: none"> <li>Ledger name from list of values</li> <li>Accounting period for the ledger from list of values</li> <li>Detail</li> <li>Summary</li> <li>Cross-charge transactions</li> <li>Expenditure transactions</li> <li>Inventory transactions</li> <li>Receipt accrual transactions</li> <li>Revenue transactions</li> <li>Supplier invoice transactions</li> </ul>
Project Accounting Period Close Exceptions Report	Project Accounting Period Close Exceptions Report	<ul style="list-style-type: none"> <li>*Business Unit</li> <li>*Period</li> <li>Report Style</li> <li>Transaction Category</li> </ul>	<ul style="list-style-type: none"> <li>Business unit name from list of values</li> <li>Project accounting period for the business unit from list of values</li> <li>Detail</li> <li>Summary</li> <li>Cross-charge transactions</li> <li>Expenditure transactions</li> <li>Inventory transactions</li> <li>Receipt accrual transactions</li> <li>Revenue transactions</li> <li>Supplier invoice transactions</li> </ul>

The following processes always trigger the Validate Pending Inventory and Receipt Transactions process:

- Close Accounting Period
- Close Project Accounting Period

The following processes for inventory or receipt accrual transactions always trigger the Validate Pending Inventory and Receipt Transactions process:

- Accounting Period Close Exceptions Report

- Project Accounting Period Close Exceptions Report

The following processes have the processing mode set to Update:

- Close Accounting Period
- Close Project Accounting Period

The following processes have the processing mode set to Review:

- Accounting Period Close Exceptions Report
- Project Accounting Period Close Exceptions Report

## Federal Financial Report

This topic provides an overview of the Federal Financial Report.

### Overview

The Federal Financial Report provides the award financial information in a standard layout defined by the federal agency. Use this report to track the summary transactions for an award, the amount spent or received, and the outstanding obligation amount.

### Key Insights

This report answers the following business questions:

- What's the cumulative amount of actual cash received that you must report to the federal agency?
- What's the cumulative amount of federal fund disbursements that you must report to the federal agency?
- What's the total funds authorized, total expenditures, and total unliquidated obligation that you must report to the federal agency?

### Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics - Shared Folders - Projects - Grants Management - Award
How do I generate this report?	Submit the Federal Financial Report process.
Who uses this report?	Grants Administrator
When do I use this report?	When you want to view and print award financial information in the standard federal format.
What can I do with this report?	View the following information and print the report. <ul style="list-style-type: none"> <li>• Federal agency details</li> <li>• Recipient details</li> <li>• Project or grant period</li> </ul>

FAQ	Answer
	<ul style="list-style-type: none"> <li>• Transactions:                             <ul style="list-style-type: none"> <li>○ Federal cash amount</li> <li>○ Federal expenditures and unobligated balance</li> <li>○ Recipient share</li> <li>○ Program income</li> </ul> </li> </ul>
What type of report is this?	Oracle Analytics Publisher

### Process Parameters for the Report

You can run the Federal Financial Report process for a single award or multiple awards within or across business units.

**Note:** The principal investigator can't generate the federal financial report.

The Federal Financial Report process accepts the following parameters:

Parameter	Description
* Generate Report	Specifies to submit the process for a single award or multiple awards.
* Business Unit	Name of the business unit.
* Award Name	Name of the award.  <b>Note:</b> Not required when you process multiple awards.
Sponsor	Name of the sponsor.  <b>Note:</b> Required when you process multiple awards. When the award uses a letter of credit, the LOC number is displayed. The sponsor award number and document number are listed in the Federal Grant Number field when you process single or multiple awards, respectively.
Institution	Name of the business unit.  <b>Note:</b> Required only when you process multiple awards.
* Certifying Official	Authorized person who signs on the federal financial report when submitting it to the federal agency.

Parameter	Description
* Report Date	Date when the report is generated and submitted to the federal agency. The default value is the current date.
* Period End Date	End date of the reporting period. For example, 31 March is the end date for the quarterly report.
* Report Type	Type of report. Valid values are Annual, Semi-Annual, Quarterly, or Final.
Basis of Accounting	Values are Accrual or Cash. The default value is selected from the primary ledger.
Total Recipient Share Required	Total required recipient share of costs within the Federal Financial Report report period end date.  <b>Note:</b> Required only when you process a single award.
Total Federal Program Income	Amount of federal program income earned.  <b>Note:</b> Required only when you process a single award.
Program Income Expended in Accordance with the Deduction Alternative	Amount of program income that was used to reduce the federal share of the total project costs.  <b>Note:</b> Required only when you process a single award.
Program Income Expended in Accordance with the Addition Alternative	Amount of program income that was added to the funds committed to the total project costs and expended to further eligible projects or program activities.  <b>Note:</b> Required only when you process a single award.
Comments	Any explanations or information that's required by the federal sponsoring agency.

## Output Report

The Federal Financial Report output report prints the following details:

Section in the Report	Field Name	Description
1	Federal Agency and Organizational Element to Which Report is Submitted	Name of the primary sponsor of the award.

Section in the Report	Field Name	Description
		Only awards with federal sponsors are applicable for Federal Financial Report generation.
2	Federal Grant or Other Identifying Number Assigned by Federal Agency	Award number that's tracked by the sponsor.  The award number is displayed in the <b>Sponsor Award Number</b> field, in the General tab in the Edit Award Details page.
3	Recipient Organization (Name, Street 1, Street 2, City, State, County, Country, Province, Zip/Postal Code)	Name and address (the primary address that you entered in the Manage Institutions page) of the award institution.  The award institution is displayed in the <b>Institution</b> field in the General tab in the Edit Award Details page.
4a	Unique Entity ID	The identifier of the institution that's used in the report. The unique entity ID appears in the Unique Entity Identifier field in the Create Institution and Manage Institutions pages in Setup and Maintenance.
4b	EIN	Unique identification number of the employer that's assigned by the Internal Revenue Service (IRS) for tax and accounting purposes.  This value is populated from the legal entity that's associated with the award organization.
5	Recipient Account Number or Identifying Number	Award or contract number of the award for which the report is generated.
6	Report Type	Type of Federal Financial Report. Valid values are Annual, Final, Quarterly, and Semiannual.  The report type is the <b>Report Type</b> parameter value that you specified when you submitted the <b>Generate Federal Financial Report</b> process.
7	Basis of Accounting	Accounting method of the primary ledger of the award organization.  The accounting method is displayed in the <b>Accounting Method</b> field of the primary ledger of the award organization in the Manage Primary Ledgers page in the Setup and Maintenance work area.
8	Project/Grant Period	Start and end date of the award for which the report is generated.



Section in the Report	Field Name	Description
		The start and end dates are displayed in the <b>Start Date</b> and <b>End Date</b> fields in the Edit Award Details page.
9	Report period end date	Date up to which the report amounts are calculated. The default value is the current date.  The report period end date is the <b>Report Date</b> parameter value that you specified when you submitted the <b>Generate Federal Financial Report</b> process.
10	Transactions	Displays the cumulative amounts of expenditures with accounted dates within the inception of the award through the Federal Financial Report report period end date.
10a	Cash Receipts	Sum of the applied (receipts matched against the invoice) and accounted receipt amounts with the accounting date from inception till the Federal Financial Report report period end date.  Go to <b>Receivables</b> , click <b>Manage Receipts</b> , and search for receipts that have an invoice mapped and accounting date that's less than the Federal Financial Report report period end date.
10b	Cash Disbursements	Sum of all accounted burdened cost incurred by the sponsor (external funding source) with the provider ledger accounting date that's within the Federal Financial Report report period end date.  Go to <b>Projects &gt; Costs</b> , and click <b>Manage Project Costs</b> in the panel drawer. Search for costs that match the contract and funding source as the sponsor and with an accounting period that's within the Federal Financial Report report period end date.
10c	Cash on Hand	Difference between cash receipts (10a) and cash disbursements (10b).
10d	Total Federal funds authorized	Sum of all direct and indirect funding from the sponsor (federal funds) that's allocated to budget periods within the Federal Financial Report report period end date.
10e	Federal share of expenditures	Sum of all accounted burdened cost incurred by the sponsor (external funding source) with provider ledger accounting date that's within the Federal Financial Report report period end date.  Go to <b>Projects &gt; Costs</b> , and click <b>Manage Project Costs</b> in the panel drawer. Search for

Section in the Report	Field Name	Description
		costs that match the contract and funding source as the sponsor and with an accounting period that's within the Federal Financial Report report period end date.
10f	Federal share of unliquidated obligations	Sum of burdened costs from commitment transactions with provider ledger accounting date that's within the Federal Financial Report report period end date. Only purchase orders and supplier invoices are picked from commitments. Requisitions and third party commitments aren't considered.  Go to <b>Projects &gt; Costs</b> , and click <b>Manage Committed Costs</b> in the panel drawer. Search for costs that match the contract and with an accounting period that's within the Federal Financial Report report period end date.
10g	Total Federal share	Sum of federal share of expenditures (10e) and federal share of unliquidated obligations (10f).
10h	Unobligated balance of Federal Funds	Difference between the total federal funds authorized (10d) and total federal share (10g).
10i	Total receipt share required	Total required recipient share of costs within the Federal Financial Report report period end date.  The total recipient share required is the <b>Total Recipient Share Required</b> parameter value that you specified when you submitted the <b>Generate Federal Financial Report</b> process.
10j	Recipient share of expenditures	Sum of all accounted burdened cost incurred by the internal funding sources with provider ledger accounting date that's within the Federal Financial Report report period end date.  Go to <b>Projects &gt; Costs</b> , and click <b>Manage Project Costs</b> in the panel drawer. Search for costs that match the contract and funding source as internal or organization and with an accounting period that's within the Federal Financial Report report period end date.
10k	Remaining receipt share to be provided	Difference between the total receipt share required (10i) and recipient share of expenditures (10j).
10l	Total Federal program income earned	Amount of federal program income earned.  The total federal program income earned is the <b>Total Federal Program Income</b> parameter value that you specified when you submitted

Section in the Report	Field Name	Description
		the <b>Generate Federal Financial Report</b> process.
10m	Program Income expended in accordance with the deduction alternative	<p>Amount of program income that was used to reduce the federal share of the total project costs.</p> <p>The program income expended in accordance with the deduction alternative is the <b>Program Income Expended in Accordance with the Deduction Alternative</b> parameter value that you specified when you submitted the <b>Generate Federal Financial Report</b> process.</p>
10n	Program Income expended in accordance with the addition alternative	<p>Amount of program income that was added to the funds committed to the total project costs and expended to further eligible projects or program activities.</p> <p>The program income expended in accordance with the addition alternative is the <b>Program Income Expended in Accordance with the Addition Alternative</b> parameter value that you specified when you submitted the <b>Generate Federal Financial Report</b> process.</p>
10o	Unexpended program income	Difference between the total federal program income earned (10l) and either the program income expended in accordance with the deduction alternative (10m) or the program income expended in accordance with the addition alternative (10n); based on which field has a value.
11	Indirect Expense	<p>Displays the burden schedule version details that the expenditure items, dated until the report period end date, use to create the indirect expense amounts.</p> <p><b>Note:</b>                      Burden costs are calculated using the project raw cost and the burden schedule multiplier.</p> <p>This section reports data only if the burden is calculated by the service. For converted costs, if the burden is loaded as miscellaneous costs, these are not reported in the Indirect Cost section. If the burden is loaded as miscellaneous costs, you can, however, change the query of the Federal Financial Report output report manually to include the imported burden costs for the converted costs.</p>

Section in the Report	Field Name	Description
11a	Type	Type of the burden schedule version that's used for calculating the burden rates for the expenditure items.
11b	Rate	Overall rate of costs under the burden schedule that's calculated using the following formula: $(\text{Total burden cost} / \text{Total raw cost}) \times 100$ .
11c	Period From, Period To	Start and end dates of the burden schedule version for indirect expenses.
11d	Base	Total raw cost of all the costs that were created before the report period end date using the burden schedule, and that belong to the award and funding source (sponsor) for this report.
11e	Amount Charged	Total burden cost of all the costs that were created before the report period end date using the burden schedule, and that belong to the award and funding source (sponsor) for this report.  Burden cost is calculated for each eligible transaction by multiplying the project raw cost with the applicable burden multipliers defined in the burden schedule and then summing up all the calculated burden costs.
11f	Federal Share	The federal share value is populated from the Amount Charged (11e) field.
11g	Totals	Total of each of the indirect expense column value.
12	Remarks	Any explanations or information that's required by the federal sponsoring agency.  The remarks are from the <b>Comments</b> parameter value that you specified when you submitted the <b>Generate Federal Financial Report</b> process.
13	Certification	Displays the certification details.
13a	Name and Title of Authorized Certifying Official	Details of the person that you specified in the <b>Certifying Official</b> parameter when you submitted the <b>Generate Federal Financial Report</b> process.
13b	Signature of Authorized Certifying Official	Not populated during the Federal Financial Report generation.

Section in the Report	Field Name	Description
13c	Telephone(Area code, number and extension)	Contact details of the person that you specified in the <b>Certifying Official</b> parameter when you submitted the <b>Generate Federal Financial Report</b> process.
13d	Email Address	Email address of the person that you specified in the <b>Certifying Official</b> parameter when you submitted the <b>Generate Federal Financial Report</b> process.
13e	Date Report Submitted	Date that's populated from the <b>Report Date</b> parameter value that you specified when you submitted the <b>Generate Federal Financial Report</b> process. The default value is the current date.

### Indirect Expense Calculation in the Federal Financial Report

The Base, Amount Charged, and Rate values that you view in the Indirect Expenses section of the Federal Financial Report are calculated using formulas based on the dates of the report.

The formulas use the following setup objects:

- Burden Structures
- Burden Cost Codes
- Burden Schedules

### Example of Calculating Indirect Expenses and Populating them in the Federal Financial Report

This example explains how indirect expenses are calculated and populated in the Federal Financial Report output report for the **FFR Bonus Salary Award** award.

In this example, here's how the burden structure is setup in the Manage Burden Structures page:

Field	Value	Value
Name	Bonus Salary Structure	None
Structure Type	Precedence	None
From Date	01/01/01	None
Cost Base	Labor	None
Cost Base Type	Burden Cost	None
Burden Cost Code	Fringe	Labor Costing

Field	Value	Value
Precedence	1	2
Expenditure Type	Administration	Professional
Description	Administration	Professional
Direct Cost	Y	N
<b>Note:</b> The direct cost value is specified in the Manage Burden Cost Codes setup page.		

The budget schedule versions are set up in the Manage Burden Schedules setup page, as follows:

Field	Value	Value	Value	Value
Version	2021-and-After	Jul-Dec2020	Jan-Jun2020	Before2020
From Date	01/01/21	07/01/20	01/01/20	01/01/01
To Date	None	12/31/20	6/30/20	12/31/19
Type	Firm	Firm	Firm	Firm
Burden Structure	Bonus Salary Structure	Bonus Salary Structure	Bonus Salary Structure	Bonus Salary Structure

The multipliers to the burden schedule versions are set up as follows:

- For Before2020 burden schedule version:

Field	Value
Organization	Vision City Operations
Burden Cost Code	Labor Costing
Multiplier	0.5

Field	Value

- For Jan-Jun2020 burden schedule version:

Field	Value	Value
Organization	Vision City Operations	Vision City Operations
Burden Cost Code	Labor Costing	Fringe
Multiplier	0.5	0.2

- For Jul-Dec2020 burden schedule version:

Field	Value	Value
Organization	Vision City Operations	Vision City Operations
Burden Cost Code	Labor Costing	Fringe
Multiplier	0.52	0.2

- For 2021-and-After burden schedule version:

Field	Value
Organization	Vision City Operations
Burden Cost Code	Labor Costing
Multiplier	0.5

The FFR Bonus Salary Award award is created with the following values:

Award and Award Project Attributes	Value
Award Number	FFR_BONUS_SALARY_AWARD
Start Date	10/01/17
End Date	9/30/22
Primary Sponsor	Department of Health and Human Services (DHHS)
Business Unit	Vision City Operations
Legal Entity	Vision City LE
Institution	Stephen University
Burden Schedule	FFR Burden Schedules
Project Name	FFR Salary Project
Project Number	FFR_Salary_Project
Funding Source	Department of Health and Human Services (DHHS)
Start Date	10/01/17
<b>Note:</b> Start date of the award project.	
End Date	9/30/22
<b>Note:</b> End date of the award project.	
Burden Schedule Overrides	None

The Federal Financial Report process for the FFR Bonus Salary Award award is submitted with the following parameters:

Parameter	Value
Business Unit	Vision City Operations



Parameter	Value
Award Name	FFR Bonus Salary Award
Report Type	Annual
Certifying Official	Mike Phillips
Report Date	8/12/20
Period End Date	8/12/20

Two payroll costs are defined for the Jan-Jun2020 and Jul-Dec2020 burden schedule versions with the following values:

Payroll Cost Attributes	Value	Value
Transaction Number	7914796	7914799
Expenditure Item Date	01/01/20	07/01/20
Expenditure Type	Administration	Administration
Raw Cost	\$100.00	\$100.00
Burdened Cost	\$100.00	\$100.00
Expenditure Organization	Vision City Operations	Vision City Operations
Project Number	FFR_Salary_Project	FFR_Salary_Project
Task Number	1.1	1.1
Contract Name	FFR Bonus Salary Award	FFR Bonus Salary Award
Funding Source	Department of Health and Human Services (DHHS)	Department of Health and Human Services (DHHS)
Person Name	Parker, Alice	Parker, Alice

These two payroll costs are used to calculate the indirect expenses. The indirect expenses are calculated and populated in the Federal Financial Report output report as follows:

Type	Rate	Period From	Period To	Base	Amount Charged	Federal Share
Final	50	01/01/20	06/30/20	\$120.00	\$60.00	\$60.00
Final	52	07/01/20	12/31/20	\$120.00	\$62.40	\$62.40

The Base, Amount Charged and Rate are derived for the costs using the Jan-Jun2020 burden schedule version, as follows:

- The Base value of \$120.00 is derived, as follows. As fringe is considered as direct cost, the transaction raw cost (100) is multiplied with the multiplier of fringe (0.2).  

$$\text{SUM}(100 + (100 \times 0.2))$$
- The Amount Charged value of \$60.00 is derived as follows:  

$$\text{SUM}( (100 + (100 \times 0.2)) \times 0.5$$
- The Rate value of 50 is derived as follows:  

$$(60 / 120) \times 100$$

#### Related Topics

- [How Burden Costs Are Calculated](#)
- [How Burden Structure Components Work Together](#)
- [How Burden Schedule Components Work Together](#)

## Preview Invoice Report

This topic provides an overview of the Preview Invoice report.

### Overview

You can review invoice information in a specific format using the Preview Invoice feature in the Invoices work area before printing the invoice or sending it to account receivables. To preview the invoice, you must select the:

- Invoice format template in which you want to preview the invoice. For example, Services Standard Invoice Report, and so on.  
 You can create your own format templates for your invoices.
- Output format in which you want to preview the invoice. For example, HTML, PDF, RTF, and so on.  
 To generate the Preview Invoice report in PDF format, you must install Adobe Acrobat Reader. You can download it from <http://adobe.com>.

### Key Insights

This report answers the following business questions:

- Which cost transactions and billing events are billed through the invoice?

- Are the transactions billed at the correct rates?
- Are the invoice line descriptions well formatted and do they provide the requested information?

## Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Billing
How do I generate this report?	<p>Invoices Work Area - Invoice Processing Status:</p> <ul style="list-style-type: none"> <li>• Draft Invoices - Actions - Preview</li> <li>• Submitted Invoices - Actions - Preview</li> <li>• Released Invoices - Actions - Preview</li> </ul> <p>Alternatively, click the <b>Preview</b> button on Draft Invoices, Submitted Invoices, and Released Invoices tabs in the Invoice Processing Status region of the Invoices work area.</p> <p>Click the <b>Preview</b> button on the Edit Invoices page for draft invoices or on the Invoice Details page for submitted, accepted, and released invoices.</p> <p>Click Preview on the invoices on the Manage Project Invoices page of the Projects work area.</p>
Who uses this report?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Billing Specialist</li> <li>• Project Manager</li> </ul>
When do I use this report?	When you need to preview the invoice before printing or sending it to account receivables.
What can I do with this report?	<p>You can view the following information:</p> <ul style="list-style-type: none"> <li>• Contract terms</li> <li>• Invoice date</li> <li>• Invoice line details</li> <li>• Project summary</li> <li>• Total billed amount</li> </ul>
What type of report is this?	Oracle Analytics Publisher
How do I modify this report?	Sign in to Oracle BI Publisher to edit the layout and properties of the predefined Services Invoice Report or the Services Standard Invoice Report. You can also modify the predefined Email Attachment Invoice Template, which is used for attaching a preview of a project contract invoice to an invoice approval workflow notification. After you complete modifying the Preview Invoice Report in the BI Publisher, mark the Manage Invoice Templates task as complete in Setup and Maintenance work area.

You must select a single invoice to generate the Preview Invoice report. You can't generate the report if you select multiple invoices in the Invoices work area.

*Related Topics*

- [Preview SF270 Report](#)

## Preview SF270 Report

This topic provides an overview of the Preview SF270 federal report.

### Overview

You can use the Preview SF270 report to request only for reimbursements on federal grant awards which aren't sponsored through letters of credit.

### Key Insights

This report answers the following business question:

- What is the reimbursement amount to request, as of a certain period, from the federal agency?

### Frequently Asked Questions

The following tables lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Billing
How do I generate this report?	<ul style="list-style-type: none"> <li>• Using the Generate Invoices process</li> <li>• Manage Invoices - Review SF 270</li> </ul>
Who uses this report?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Billing Specialist</li> </ul>
When do I use this report?	When you need to: <ul style="list-style-type: none"> <li>• Request for reimbursements on federal grant awards which aren't sponsored through letters of credit</li> <li>• Display current and previously billed transactions, and cost sharing details in a standard federal format</li> </ul>
What can I do with this report?	You can view the following information in the report: <ul style="list-style-type: none"> <li>• Bill From and Bill To</li> <li>• Type of payment requested</li> <li>• Basis of request</li> <li>• Federal sponsoring agency and organization to which the SF270 invoice is submitted</li> <li>• Federal grant or other identification number assigned by the federal agency</li> <li>• Partial payment request number</li> <li>• Employer identification number</li> <li>• Recipient account number</li> </ul>

FAQ	Answer
	<ul style="list-style-type: none"> <li>• Period covered by the request</li> <li>• Recipient organization name and address</li> <li>• Federal amount of reimbursement</li> <li>• Total program outlay to date</li> <li>• Cumulative Program Income</li> <li>• Estimated net cash outlay for advance period</li> <li>• Federal and non-Federal share of the cost</li> <li>• Additional notes</li> </ul>
What type of report is this?	Oracle Analytics Publisher

### Prerequisites

Before you can generate and review your invoice in the SF270 report format, you must:

- Implement Grants Management application for the business unit to which the invoice contract belongs.
- Select SF270 as the invoice format in the contract bill plan.
- Create your invoice contract as an award contract.
- Select only a single invoice to preview.

#### Related Topics

- [Preview Invoice Report](#)

## Create Accounting Transactions Execution Report

This topic provides an overview of the Create Accounting Transactions Execution Report.

### Overview

You can use the Create Accounting Transactions Execution Report to review the reclassification of accounting transactions to effectively net unbilled receivables and deferred revenue balances together into a single balance.

### Key Insights

This report answers the following business questions:

- What are the summary results of the reclassify billing offset balances process?
- What errors were encountered attempting to reclassify billing offset balances?
- What billing offset reclassification accounting transactions were successfully created by the process?

### Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics - Shared Folders - Projects - Project Revenue
How do I generate this report?	Using the Create Accounting Transactions process from: <ul style="list-style-type: none"> <li>Revenue Work Area - Tasks - Accounting</li> <li>Scheduled Processes - Schedule New Process</li> </ul>
Who uses this report?	<ul style="list-style-type: none"> <li>Grants Accountant</li> <li>Project Accountant</li> </ul>
When do I use this report?	When you need to group the unbilled receivables and deferred revenue balances into a single balance.
What can I do with this report?	You can view the following information and print the report. <ul style="list-style-type: none"> <li>Reclassification errors</li> <li>Reclassification warnings</li> <li>Successful reclassifications</li> </ul>
What type of report is this?	Oracle Analytics Publisher

## Process Parameters for the Report

The Reclassify Billing Offset Balances process accepts the following parameters.

Parameter	Values
*Business Unit	List of values, for example, Vision Operations
*Accounting Period	List of values, for example, 2009-AUG
Contract Type	List of values
Revenue Method Classification	<ul style="list-style-type: none"> <li>Rate Based</li> <li>Amount Based</li> <li>Percent Complete</li> <li>Percent Spent</li> <li>As Incurred</li> <li>As Billed</li> </ul>
Contract Number	List of values
Contract Line Number	List of values

Parameter	Values
*Generate Success Report	<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>

## Sweep Transaction Accounting Events Execution Report

This topic provides an overview of the Sweep Transaction Accounting Events Execution Report.

### Overview

You can use the Sweep Transaction Accounting Events Execution Report to review unaccounted transactions that are moved into the next open or future-enterable accounting period so that the current period can be closed.

### Key Insights

This report answers the following business questions:

- Are there transactions which need to be accounted before I can close the period?
- If I run the Sweep Transaction Accounting Events process, which transactions are moved from the current period into the next open period?
- What's the result of the Sweep Transaction Accounting Events process?

### Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics - Shared Folders - Projects - Project Cost - Accounting
How do I generate this report?	Using the Sweep Transaction Accounting Events process from: <ul style="list-style-type: none"> <li>• Revenue Work Area - Tasks - Accounting</li> <li>• Scheduled Processes - Schedule New Process</li> </ul>
Who uses this report?	<ul style="list-style-type: none"> <li>• Grants Accountant</li> <li>• Project Accountant</li> </ul>
When do I use this report?	When you need to close a period that has unaccounted transactions.
What can I do with this report?	You can review the output of the Sweep Transaction Accounting Events process and print the report.
What type of report is this?	Oracle Analytics Publisher

### Process Parameters for the Report

The Sweep Transaction Accounting Events process accepts the following parameters.

Parameter	Values
*Ledger	List of values, for example, Vision City
Business Unit	List of values, for example, Vision Operations
*Accounting Period	List of values, for example, Jan-06
Source Application	<ul style="list-style-type: none"> <li>Project Billing</li> <li>Project Costing</li> </ul>
*Process Mode	<ul style="list-style-type: none"> <li>Review</li> <li>Update</li> </ul>

## Configurable Workflow Notifications

### Overview of Configurable Workflow Notifications in Project Management

As part of workflow tasks, the application automatically sends notifications. For example, when a project manager assigns a task to a resource, the application sends a notification to the resource.

For some workflow tasks, you can use Oracle Business Intelligence (BI) Publisher to tailor the content, layout, and style of the notifications. These report-based notifications aren't only configurable, but also optimized for viewing on mobile devices.

**Tip:** In some workflows, the notifications aren't sent to the user performing the action. For example, Change Order Status Change Notification is sent to previous owner, new owner, and creator when the ownership changes. If the creator changes the ownership, the notification isn't sent to the creator because notifications aren't sent to the user performing the action. In most other workflows, you can configure who can receive the notifications.

In addition to getting notifications in email, users can also view in-app notifications by:

- Clicking the **Notifications** icon in the global header and opening a notification
- Going to the Worklist: Notifications and Approvals work area and opening a notification
- Clicking the **In-App Notification** link at the end of an email notification

Here's a table that shows the products that have configurable notifications, along with their associated report name, description, recipients and when it's sent. To navigate to the reports, open **Reports and Analytics** work area > **Browse Catalog** > **Shared Folders** > **Projects** > **Workflow Notifications**. Keep in mind that each report caters to multiple cases.

Product	Report Name	Description	When It's Sent	Default Recipients
Project Management	Milestone Completion Approval Notification	Approval notification that's sent to the approval participants when a billable milestone is set to the	Milestone status is set to Completion approval requested	Primary Project Manager



Product	Report Name	Description	When It's Sent	Default Recipients
		Completion approval requested status.		
Project Management	Change Order Status Change Notification	Information notification that's sent when a change order is assigned, closed, or canceled.	Ownership changes	<ul style="list-style-type: none"> <li>• Previous owner</li> <li>• New owner</li> <li>• Creator</li> </ul>
Project Management	Change Order Status Change Notification	Information notification that's sent when a change order is assigned, closed, or canceled.	Owner closes or cancels change order	<ul style="list-style-type: none"> <li>• Participants</li> <li>• Creator</li> </ul>
Project Management	Change Order Participant Notifications	Information notification that's sent when participants are assigned or removed from a change order.	Change order is submitted for impact assessment	Change Order Assessors
Project Management	Change Order Participant Notifications	Information notification that's sent when participants are assigned or removed from a change order.	Change order is submitted for review	Change Order Reviewers
Project Management	Change Order Approval Request Notifications	Approval notification that's sent to the approval participants when a change order is moved to the approval stage.	Change order is submitted for approval	Change Order Approvers
Project Management	Change Order Participant Notifications	Information notification that's sent when participants are assigned or removed from a change order.	Change order is submitted for implementation	Change Order Implementors
Project Management	Change Order Stage Completion Notifications	Information notification that's sent when a participant completes a stage, approves a change order, or rejects a change order.	<ul style="list-style-type: none"> <li>• Assessor completes the impact assessment stage</li> <li>• Reviewer completes the review stage</li> <li>• Approver approves or rejects the change order</li> <li>• Implementor completes the implementation stage</li> </ul>	Owner
Project Management	Issue Notifications	Information notification that's sent when an issue is assigned, closed, or reopened.	Ownership changes	<ul style="list-style-type: none"> <li>• Previous owner</li> <li>• New owner</li> <li>• Creator</li> </ul>

Product	Report Name	Description	When It's Sent	Default Recipients
Project Management	Issue Notifications	Information notification that's sent when an issue is assigned, closed, or reopened.	An issue is closed or reopened	<ul style="list-style-type: none"> <li>• Creator</li> <li>• Owner</li> </ul>
Project Management	Deliverable Notifications	Information notification that's sent when a deliverable is assigned, or completed.	Owner is changed	<ul style="list-style-type: none"> <li>• Previous owner</li> <li>• New owner</li> <li>• Creator</li> </ul>
Project Management	Deliverable Notifications	Information notification that's sent when a deliverable is assigned, or completed.	Deliverable is completed	<ul style="list-style-type: none"> <li>• Owner</li> <li>• Creator</li> </ul>
Project Management	Gate Approval Request Notification	Action notification that's sent when an approver is assigned to a gate.	Gate approver is assigned	Gate approver
Project Management	Gate Status Change Notifications	Information notification that's sent when a gate is approved or rejected.	Gate is approved or rejected	Project manager
Task Management	Task Details Notifications	Information notification that's sent when a follower is added, a followed task is completed, or a project task, action item, to-do task, or milestone is assigned.	<ul style="list-style-type: none"> <li>• A follower is assigned to a project task, action item, to-do task, or milestone</li> <li>• Project task, action item, to-do task, or milestone is completed</li> </ul>	Follower
Task Management	Task Details Notifications	Information notification that's sent when a follower is added, a followed task is completed, or a project task, action item, to-do task, or milestone is assigned.	Project task, action item, to-do task, or milestone is assigned	Assignee
Project Resource Management	Resource Request Notification	Information notification to the resource manager when a project resource request is created.	Project manager creates project resource request for fulfillment.	Resource Manager
Project Resource Management	Proposed Resource Approval Notification	Approval notification to the project manager when the resource manager proposes a resource on a project resource request.	Resource manager proposes a resource to fulfill assignment	Project Manager

Product	Report Name	Description	When It's Sent	Default Recipients
Project Resource Management	Proposed or Nominated Resource Notifications	Information notification to the project manager when the resource manager proposes or nominates a resource on a project resource request.	Resource manager proposes or nominates resources	Project Manager
Project Resource Management	Resource Assignment Notifications	Information notification when a project resource assignment is created directly, or when a proposed or nominated resource is approved on a request.	<ul style="list-style-type: none"> <li>Resource manager proposes and approves resources on a request</li> <li>Resource manager creates direct resource assignment</li> <li>Resource manager approves the nominated resource that the project manager requested for assignment</li> <li>Project manager approves the proposed resources on a request .</li> </ul>	<ul style="list-style-type: none"> <li>Project Manager</li> <li>Resource Manager</li> </ul>
Project Resource Management	Proposed or Nominated Resource Reject Notification	Information notification when a proposed resource is rejected, or when an assignment request for a nominated resource is rejected.	<ul style="list-style-type: none"> <li>Project manager rejects the proposed resource</li> <li>Resource manager rejects the nominated resource requested by project manager for assignment</li> </ul>	<ul style="list-style-type: none"> <li>Resource Manager</li> <li>Project Manager</li> </ul>
Project Resource Management	Assignment Notifications Notifying Resource	Information notification to the resource when the resource is assigned to a project, or when an existing project resource assignment is rescheduled or canceled.	<ul style="list-style-type: none"> <li>Resource manager creates a direct resource assignment, proposes and approves a resource, approves a nominated resource that project manager requested for assignment, cancels an assignment, or updates and approves an assignment schedule change</li> <li>Project manager accepts a proposed resource, approves a canceled assignment, approves a change in assignment schedule</li> </ul>	Resource
Project Resource Management	Assignment Cancellation Approval Notification	Approval notification to the project manager when	Resource manager cancels an assignment	Project Manager

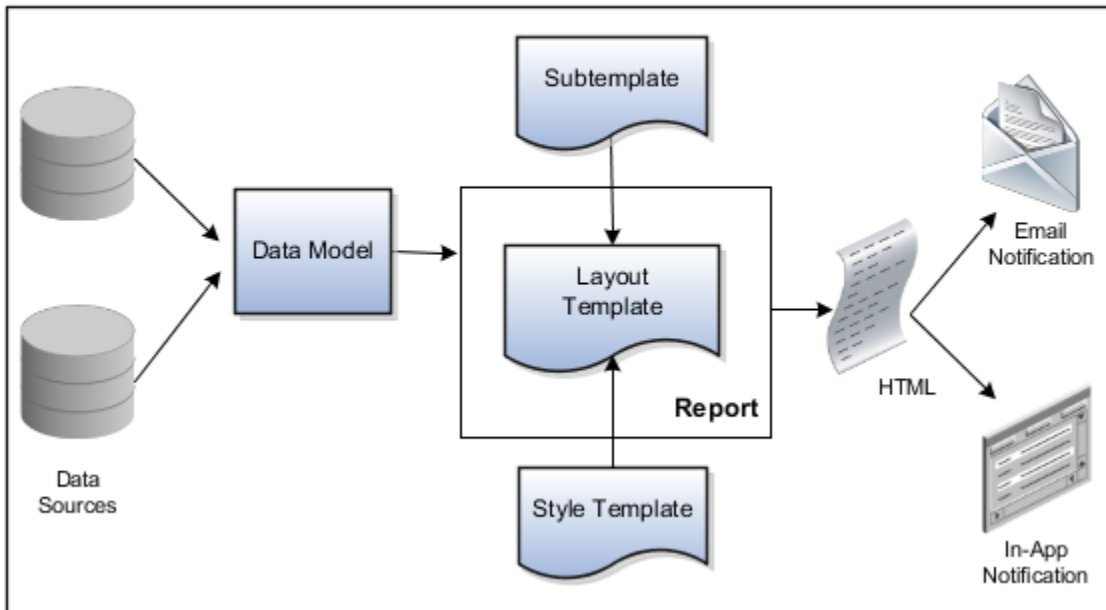
Product	Report Name	Description	When It's Sent	Default Recipients
		the resource manager requests a project resource assignment cancellation.		
Project Resource Management	Assignment Cancellation Notifications	Information notification that informs that a project resource assignment is directly canceled, or a cancellation request is approved.	<ul style="list-style-type: none"> <li>Resource manager cancels an assignment</li> <li>Project manager approves the request for assignment cancellation</li> </ul>	<ul style="list-style-type: none"> <li>Project Manager</li> <li>Resource Manager</li> </ul>
Project Resource Management	Assignment Adjustment Rejection Notifications	Information notification that informs that a project resource assignment schedule change or cancellation request is rejected.	Project manager rejects the request for assignment cancellation or the assignment schedule change	Resource Manager
Project Resource Management	Assignment Schedule Change Approval Notification	Approval notification to the project manager when the resource manager requests a project resource assignment schedule change.	Resource manager updates the assignment schedule	Project Manager
Project Resource Management	Assignment Schedule Change Notification	Information notification when a project resource assignment is adjusted, or the request for adjustment is approved.	<ul style="list-style-type: none"> <li>Resource manager updates and approves the assignment schedule</li> <li>Project manager approves the assignment schedule change</li> </ul>	<ul style="list-style-type: none"> <li>Project Manager</li> <li>Resource Manager</li> </ul>
Project Resource Management	Nominated Resource Approval Notification	Approval notification to the resource manager when the nominated resource is requested for assignment by the project manager.	Project manager requests for assignment on the resources that Resource Manager nominated	Resource Manager
Project Resource Management	Resource Staffing Unavailability Notification	Information notification to the resource pool manager when a resource is no longer available for staffing on project resource assignments.	A resource is no longer available for staffing	Staffing Owner
Project Control	Financial Project Plan Approval Notification	Approval notification that's sent when a budget is submitted for baseline or a forecast is sent for approval.	Project manager submits a budget for baseline or forecast for approval	Project Managers and Project Administrators
Project Billing	Project Contract Invoice Approval Notification	Action notification that's sent when a project	Project contract invoice is submitted	Contract Administrator

Product	Report Name	Description	When It's Sent	Default Recipients
		contract invoice is submitted for approval.		
Project Costing	Project Expenditure Batch Approval Notification	Approval notification that's sent when a project expenditure batch is submitted for approval.	Project expenditure batch is submitted for approval.	Approvers configured in the workflow approval rules.
Project Costing	Project Cost Adjustment Approval Notification	Approval notification that's sent when adjustments to project cost transactions are submitted for approval.	Adjustments to a project cost transaction is submitted for approval.	Approvers configured in the workflow approval rules.
Project Foundation	Project Status Change Approval Notification	Approval notification that's sent when a project status is changed to a status that's enabled for approval workflow.	Project status is changed to a status that's enabled for approval workflow.	Project Manager

**Note:** Project manager is the project resource requester and resource manager is the staffing owner but in some organizations, if the staffing owner is explicitly defined, the notifications are sent to the staffing owner and not the resource manager.

### Process Overview

Generating configurable notifications through BI Publisher involves various types of objects in the BI catalog, including data models, subtemplates, style templates, and reports. Reports pull data from data models and generate notifications in an HTML format. The report layout templates use common table and paragraph styles and refer to a central subtemplate that contains reusable notification components.



- **Data Sources:** Store the attributes and attribute values for business objects and transactions in the application (example of data sources being transaction tables)
- **Data Model:** Determines which attributes from data sources are available to be included in the notification and how that data is retrieved
- **Subtemplate:** Provides common components, for example a branding logo and buttons, that can be reused in multiple reports
- **Style Template:** Provides styles such as the type of lines and fonts to use in tables, or the font type, size, and color to use for headings
- **Report:** Contains a **layout template** that determines:
  - Which attributes appear in the notification, from the data model used for the report
  - What the notification looks like, leveraging components from the subtemplate and styles from the style template used for the report
- **HTML:** Is the output generated from the report
- **Email Notification:** Has the HTML output embedded in the email body
- **In-App Notification:** Has the HTML output embedded in the application UI

Each workflow task with configurable notifications has a corresponding predefined report in the BI catalog. For example, the Gate Approval Request Notification contains Gate Approval Request Notification Layout and uses the Gate Notifications data model. The generated output is included in notifications that are sent to users.

## Notification Modifications

After you enable configurable workflow notifications, the predefined reports and related objects in the BI catalog work by default. If you need to modify the notifications, you can edit copies of the predefined reports, data models, and

subtemplate (but not the style template). You proceed as you would to edit any report, data model, or subtemplate in the catalog:

1. Open the **Reports and Analytics** work area and then click **Browse Catalog**. The Oracle Transactional Business Intelligence page appears.
2. Navigate to **Shared Folders > Projects > Workflow Notifications**. And then, select the product. For example, to configure notifications related to Project Management, click Project Management Control.
3. Click **Edit** corresponding to the layout that you want to edit. A page containing all the existing layout appears.
4. Click **Edit** corresponding to the default layout to download a copy.
5. Edit the copied report layout template.
6. Upload the modified template and set it as default.

You should get familiar with BI Publisher in general before modifying configurable notifications.

- Use only the Template Builder For Word add-in to edit the .rtf template in Microsoft Word, not the layout editor or other tools available for creating and editing report layout.
- Edit a copy of predefined layout templates, rather than create new reports or layout templates.

## Security

To modify reports and data models for workflow notifications, you must have the BI administrator role.

## Setup

To use configurable notifications for Project Management, you must opt-in to the Configure Project and Task Management Notifications feature to configure notifications.

You must download and install the Template Builder for Word add-in:

1. Open the Reports and Analytics work area.
2. Click the **Browse Catalog** button.
3. Click **Home**.
4. In the Get Started pane, click **Download BI Desktop Tools** and then click **Template Builder For Word**.
5. Save and run the installer.

## Related Topics

- [More About Oracle Transactional Business Intelligence Components](#)
- [Best Practices for Content and Layout in Workflow Notifications](#)
- [Set Up for RTF and Excel Report Layout Templates](#)
- [Overview of Notifications and Approval Workflows](#)
- [Configurable Workflow Notifications: Implementation Considerations](#)





# 6 Infolets

## Overview of Infolets

An infolet is a small interactive widget that gives you key information and shows you what's going on in the areas you work on. You might also find something in an infolet that you need to follow up on.

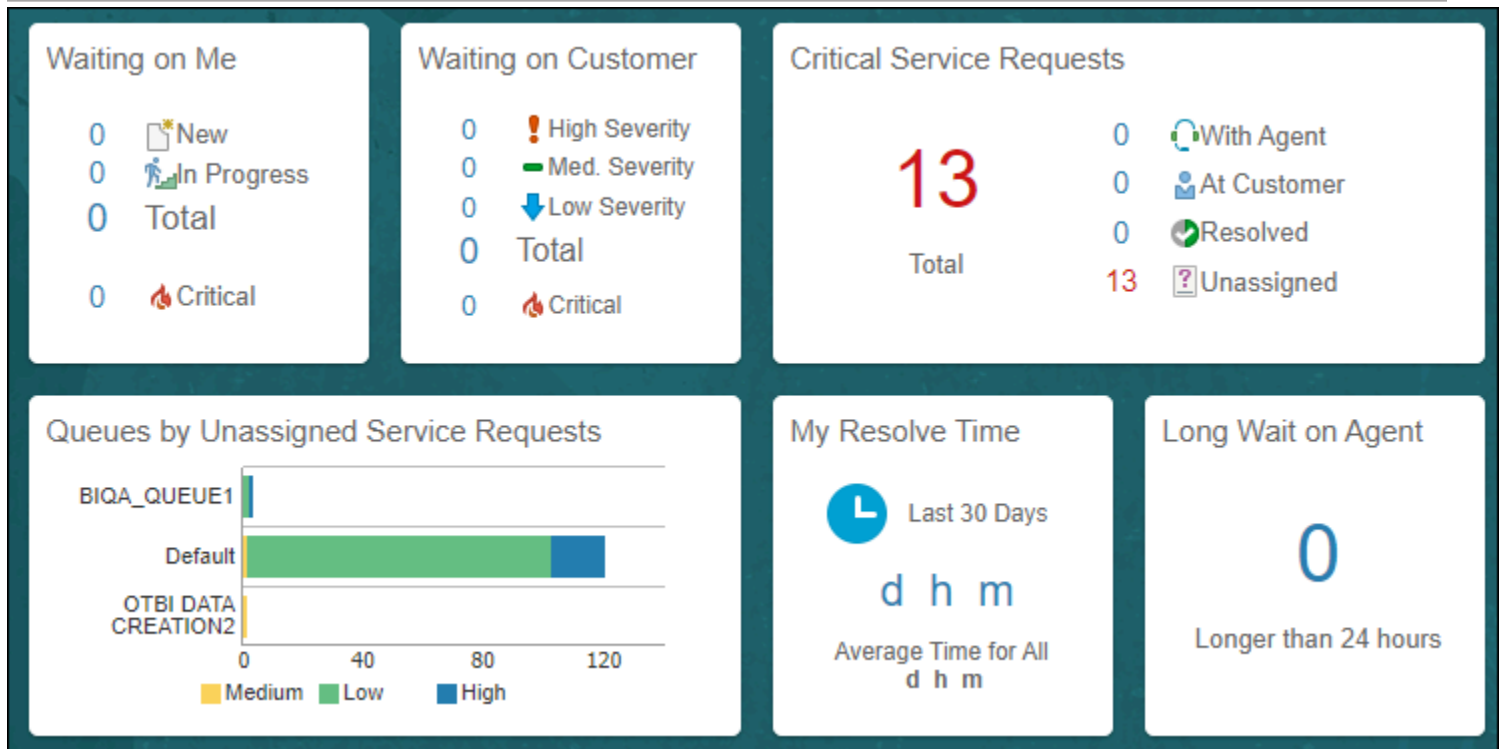
You can use infolets arranged in tabs in the Analytics section of your home page. If you're using a panel or banner layout, use the page control icons to use the infolets.

Here are a few things to know about infolets.

- Infolets have a front view, and might have a back and expanded view. Use the **Back View**, **Front View**, and **Expanded View** icons at the bottom corners of an infolet to open these views.
- Your current infolet view persists as the default view the next time you sign in. For example, if you viewed a back view of the infolet in your last session, you will see the same infolet view by default in your next session.
- Some infolets might also contain links to detailed reports. You can click anywhere in the infolet area to drill down to the detailed report.
- You can also personalize the infolets. For example, you can move or hide them on the infolets page.
- If you don't see infolet pages on your home page, then your administrators must have disabled them to show on the home page.

**Note:** Some SCM or Procurement Cloud infolets might function differently from other infolets.

Here's how an infolet page looks.



## Personalize Infolets

You can personalize the infolets on your infolets page, such as you can edit their titles and views, move them, or hide or show specific infolets on the infolets page.

### Edit Infolet Titles and Views

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Title and Views**.
2. Edit the infolet title, and enable or disable the infolet views.
3. Click **Save and Close**.

### Reorder Infolets

You can change the position of an infolet within an infolet page.

1. Click the **Infolet Repository** icon, and select **Reorder Infolets**.
2. In the Reorder Infolets dialog box, select the infolets, and use the arrows to reorder them.  
**Tip:** To select multiple infolets, press the Ctrl key, and then select them.
3. Click **Apply**.

## Hide or Show Infolets

To hide an infolet from an infolet page, click the **Infolet Repository** icon, and deselect the infolet from the list of infolets.

**Tip:** Alternatively, click the **Actions** icon on the top right corner of the infolet, and select **Hide**.

To show a hidden infolet on an infolet page, click the **Infolet Repository** icon, and select the infolet from the list of infolets.

### Related Topics

- [Configure Infolet Display](#)

# Configure Infolets

## Overview of Configuring Infolets

You can configure infolets that aggregate key information for a specific area, for example, personal profile.

Your users use infolets arranged in tabs in the Analytics section of the home page. Or, if it's a home page with a panel or banner layout, they use the page control icons.

If your users don't find infolet pages on the home page, you can enable them by using the Home Configuration tab in the Structure work area. Let's look at some tasks you can do to configure infolets.

- Create infolets.
- Add content to infolets. For example, you can add a task flow or a performance tile report, and if an infolet contains a performance tile report, then you can add a link to a detailed report in the same infolet.

**Note:** In the context of infolets, a report is an analysis, not an Analytics Publisher report.

- Edit infolets. For example, edit infolet content and add, change, or remove link to detailed report.
- Delete infolets.

But before you start creating and editing infolets, here are a few things to keep in mind:

- You can add analyses from the catalog to an infolet, but not Analytics Publisher reports, or other objects like filters or prompts.
- To create or edit infolets, you must first either create and activate a sandbox, or activate an existing one. But make sure the sandbox has the Page Composer tool selected. If you want to make changes in a context layer that isn't the default layer, Site, you must create a separate sandbox just to use Page Composer in it. You can then change the context layer from Site to the other layer. For example, to create or edit infolets for a user with a specific job role, you must select the **Job Role** context layer.
- You can validate your changes in the sandbox in preview mode before you publish it.

### Related Topics

- [Configure Infolet Display](#)
- [Best Practices for Using Page Composer in Sandboxes](#)

## Create Infolets



Watch video

Use infolet pages to create infolets. You can create an infolet, add content to it, and link detailed reports. For some product-specific infolet pages, you can't create infolets.

1. Activate a sandbox that has the Page Composer tool in it.
2. Open an infolet page.
3. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Edit Pages**.
4. Click the **Infolet Repository** icon, and select **Create Infolet**.

**Note:** If you can't find the **Create Infolet** menu item, it either means you can't create infolets for this page, or the theme may be using a global text and icon color that's too light, impacting the visibility of the UI element.

5. Enter a title for the infolet and set its views.
  - Specify the dimensions for the front view.
  - Enable or disable the back view.
  - Enable or disable the expanded view, and specify its dimensions. The dimensions of the front and the back views must be the same, but the expanded view must be bigger because it displays more details.
6. Click **Save and Close**. You can now add content to infolets.

## Add Content to Infolets

You can add content to the infolet's front, back, or expanded view. You can't add a business intelligence dashboard to an infolet because a dashboard report is generally bigger than an infolet.

1. Select the infolet's view that you want to add content to.

**Note:** To open infolet's back view, click the **Back View** icon on the bottom right corner of the infolet. And to open expanded view, click the **Expanded View** icon on the bottom right corner of the infolet's back view.

2. Click **Add Content** on the infolet. You can find this button on any of the infolet's views, but only if you don't have any existing content in that view.
3. Search and select a performance tile or a task flow, and click **Add**. You can browse the business intelligence (BI) catalog to find the analytics and reports that you want to add.
4. Close the Add Content dialog box. You can now add detailed reports to the infolet.

## Link Detailed Reports to Infolets

To provide detailed information about a subject matter on an infolet, you can add a link to a detailed report. After you add the link, your users can click anywhere in the infolet area to drill down to that detailed report. The detailed report doesn't replace the existing infolet content.

First, add a performance tile report to the infolet content, and then follow these steps:

1. Click the **Actions** icon on the top right corner of the infolet, and select **Link Detailed Report**.
2. On the Detailed Report page, click **Add Content**.
3. Search and select a report, and click **Add** to add it to the infolet.
4. Close the Add Content dialog box.
5. Click **Done**. You can now publish the sandbox.

## Publish the Sandbox

1. Preview the infolet's front view, drill down to the detailed report, and then preview the back and the expanded views.
2. After you made changes, click **Close** to leave Page Composer.
3. Test your changes and publish the sandbox to make the new infolet available to your users.

### Related Topics

- [Why don't I see infolets in the Analytics section of the home page?](#)
- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)
- [Best Practices for Using Page Composer in Sandboxes](#)
- [Why can't I see application changes made in previously published sandboxes in my current sandbox?](#)

## Edit and Delete Infolets

On the infolet page, use the options available on each infolet to edit infolet content and delete infolets.

1. Activate a sandbox that has the Page Composer tool in it.
2. Open an infolet page.
3. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Edit Pages**.

**Note:** After you're done making changes, click **Close** to leave Page Composer, test your changes, and publish the sandbox.

## Edit Infolet Content

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Content**.

**Note:** To edit the infolet content of the back or expanded view, open the view and use the **Actions** icon on that view.

2. Click **Add Content** to replace the existing content of the infolet.
3. Search and select a performance tile or a task flow, and click **Add**. You can browse the business intelligence (BI) catalog to find the analytics and reports that you want to add.
4. Close the Add Content dialog box.

## Edit Title and Views

To edit title and views of an infolet, click the **Actions** icon on the top right corner of the infolet, and select **Edit Title and Views**.

## Edit or Remove Detailed Report

You can edit or remove the detailed report.

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Detailed Report**.
2. On the Detailed Report page, you can edit or remove the detailed report.
  - o To edit, click **Edit Report** and make changes to the detailed report.
  - o To remove, click **Remove Report**.
3. Click **Done**.

## Edit Infolet Visibility

You can show or hide an infolet on the infolet page. To edit the visibility settings of an infolet, do these steps:

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Visibility**.
2. Select one of these options:
  - o **Yes**: The infolet appears on the infolet page.
  - o **No**: The infolet doesn't appear on the infolet page.
  - o **EL Expression**: The evaluation of the EL expression decides whether the infolet appears on the infolet page.

## Delete Infolets

To delete an infolet, click the **Actions** icon on the top right corner of the infolet, and select **Delete**.

**CAUTION:** You can't easily retrieve an infolet once you delete it. But if you have accidentally deleted any infolet, don't worry. Contact My Oracle Support at <https://support.oracle.com>.

### Related Topics

- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)

## Examples of EL Expressions

You can use EL expressions to configure the visibility settings of various elements like groups, page entries, infolets, or announcements on the UI for users with specific roles.

For example, you can use EL expressions to show or hide a group or page entry on the Navigator and the home page, or show or hide an infolet or an announcement on the home page. The evaluation of the EL expression decides whether these elements are displayed for users with specific roles.

## Scenario

This table shows examples of how you can use EL Expressions to show or hide specific UI elements for specific users.

Who can see the group or page entries	EL Expression and Example
Only users having any of the specific roles	<pre>#{securityContext.userInRole['&lt;Role_Name&gt;']}</pre> <pre>#{securityContext.userInRole['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB']}</pre>
Only users not having any of the specific roles	<pre>#(!(securityContext.userInRole['&lt;Role_Name&gt;'])</pre> <pre>#(!(securityContext.userInRole['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB'])</pre>
Only users having all of the specific roles	<pre>#{securityContext.userInAllRoles['&lt;Role_Name&gt;']}</pre> <pre>#{securityContext.userInAllRoles['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB']}</pre>
Only users not having all of the specific roles	<pre>#(!(securityContext.userInAllRoles['&lt;Role_Name&gt;'])</pre> <pre>#(!(securityContext.userInAllRoles['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB'])</pre>

Here are a few things to keep in mind when you use EL expressions.

- Use an EL expression that can be evaluated from any page because the Navigator is used on all pages. So, don't use product-specific EL expressions.
- Don't include spaces or double quotes in EL expressions.
- Don't copy EL expressions from a word document and paste directly in the expression editor. Doing so might introduce hidden characters in your EL expression, causing formatting issues and unexpected action. Instead, use a text editor or manually type the EL expression in the editor.

### Related Topics

- [Configure the Navigator and Page Entries on the Home Page for Navigation](#)
- [Create Roles in the Security Console](#)

## FAQs for Infolets

### Why don't I see infolets in the Analytics section of the home page?

That's probably because the infolet page is hidden.

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Change the visibility setting of the infolet page using the Home Configuration page of the Structure work area. To open this page, click **Navigator > Configuration > Structure**, and then click the Home Configuration tab.

*Related Topics*

- [Configure Infolet Display](#)

## How can I rename an icon for an infolet page in the page control on the home page?

You can rename an icon for an infolet page using the Home Configuration page of the Structure work area. To open this page, select **Configuration > Structure** from the Navigator menu, and then click the **Home Configuration** tab.

*Related Topics*

- [Configure Infolet Display](#)

## What's the difference between a performance tile report and a detailed report added to the infolets content?

Performance tile report shows data in the small infolet format. When you add a performance tile report to an infolet, users can see only the summary information about the subject matter. But this report doesn't provide detailed information.

To provide detailed information about the subject matter on the same infolet, add a link to a detailed report. Users can click this link to gather more information.



# 7 Smart View

## Set Up Oracle Smart View for Office

You can perform data analysis in real time using Oracle Smart View for Office in Project Financial Management applications.

### Prerequisite

You must install and configure Oracle Essbase to accept Smart View connections before you can use Oracle Smart View for Office to analyze your project performance.

### Steps to Enable

You can get the Smart View shared connection URL and the login credentials from your system administrator.

1. Download and install **Oracle Smart View for Office** from <http://www.oracle.com/technetwork/middleware/smart-view-for-office/overview/index.html>.
2. Open Microsoft Excel and verify that you can view the **Smart View** tab in the ribbon.
3. Click **Options** in the **Smart View** tab.
4. Enter the Smart View shared connection URL in the **Shared Connections URL** field in the **General** section. For example, <http://host:port/workspace/SmartViewProviders>.
5. Click **OK**.
6. Click **Panel** in the **Smart View** tab to open the Smart View panel.
7. Click **Shared Connections** in the Smart View panel.
8. Sign in with the user name and password provided by your administrator.
9. Click the **Select Server to proceed** drop down on the Smart View panel.
10. Select **Oracle Essbase** from the **Shared Connections** list.
11. Click **Expand** to expand the **Essbase\_FA\_Cluster** node.
12. Expand the **Projects** application.
13. Click **ProjPerf** to display the connection options at the bottom of the panel.
14. Click **Connect** to display the list of reporting options.
15. Click **ad hoc analysis** to populate the default dimensions in Smart View.

#### Related Topics

- [Use Oracle Smart View for Office to Analyze Project Performance](#)
- [Configure Smart View Client for Users](#)

## Specify the Display Format for Tasks and Resources in Smart View

Use the Display Format for Tasks and Resources in Smart View profile option to specify the display format for tasks and resources in Smart View.

By default, the profile option value is set to Task ID and Resource ID. Set the profile option value to one of the following to view the task IDs and resource IDs along with task or resource name and numbers in Smart View.

Profile Option Value	Display Format in Smart View
Task Name and Resource Name	<ul style="list-style-type: none"> <li>Task name appears followed by :: and task ID</li> <li>Resource name appears followed by :: and resource ID</li> </ul>
Task Number and Resource Name	<ul style="list-style-type: none"> <li>Task number appears followed by :: and task ID</li> <li>Resource name appears followed by :: and resource ID</li> </ul>
Task Number with Name and Resource Name	<ul style="list-style-type: none"> <li>Task number appears followed by ::, task name, ::, and task ID</li> <li>Resource name appears followed by :: and resource ID</li> </ul>

1. Navigate to the Setup and Maintenance work area and search for the **Manage Administrator Profile Values** task.
2. Click **Manage Administrator Profile Values**.
3. In the Manage Administrator Profile Values page, enter **ORA\_PJS\_DISP\_FRMT\_SMRT\_VIEW** in the **Profile Option Code** field under the **Search : Profile Option** section, and click **Search**.
4. Select an appropriate value from the **Profile Value** drop-down list.
5. Click **Save and Close**.
6. Submit the Update Project Performance Data process for those projects for which you want to view the tasks and resources in the selected format in Smart View.

In Smart View, all tasks and resources are displayed in the selected format for all projects, even if you submit the Update Project Performance data process for a particular project or for all projects.

**Note:** You can create a report using Smart View. If you don't want to view the IDs in your report, use the text functions of Excel, such as LEFT and FIND, to filter out the IDs.

*Related Topics*

- [Subject Areas for Project Management Real-Time Analyses](#)

## Create a Report Using Oracle Smart View for Office

You can perform the following steps to create a report using Oracle Smart View for Office.

1. Click **ad hoc analysis** at the bottom of the Smart View panel.
2. A new spreadsheet opens with the available dimensions displayed just below the ribbon. 6 dimensions are available to generate a report:
  - o Resource
  - o Time
  - o Time View
  - o Accounts

- o Scenario
  - o Currency Type
  - o Task
3. Drag the dimensions you want into the spreadsheet. If you want to remove a dimension, move it out of the spreadsheet.
  4. You can view the available measures by zooming into a dimension. Select the dimension and select **Zoom In** from the ribbon. You can also zoom in by clicking on the dimension.
  5. If you don't want to include all the measures in your report, you can select the measures you want to retain and then click **Keep Only** in the ribbon. You can click **Zoom Out** to return to the original dimension.
  6. For example, you can retain revenue, burden cost, margin, margin percentage, and labor effort account measures.
  7. You can expand the time view and scenario dimensions and retain the values that are relevant to your report. For example, you can retain the inception-to-date and estimate-at-completion values from the time dimension and the actual amount and current budget from the scenario dimension.
  8. You can set the remaining dimension filters from the list of values below the ribbon. For example, you can set the:
    - o Currency dimension to **Project currency**.
    - o Task dimension to **PJS CPBF Flow**. Select the project name in the task dimension if you want to view summarized values at the project level.
    - o Resource dimension to **Professional Services PRBS**.
    - o Time dimension to **Apr-15** within the accounting calendar **Accounting Mon1**.
  9. Refresh the data in the report by clicking the **Refresh** button.
  10. After the data is retrieved, you can format the report and perform further analysis by using native Microsoft Excel functionality.

You can share this report with your team or senior management through email, or upload it to a common repository. Users with appropriate data security can open the file and refresh the report to view real-time data.

#### Related Topics

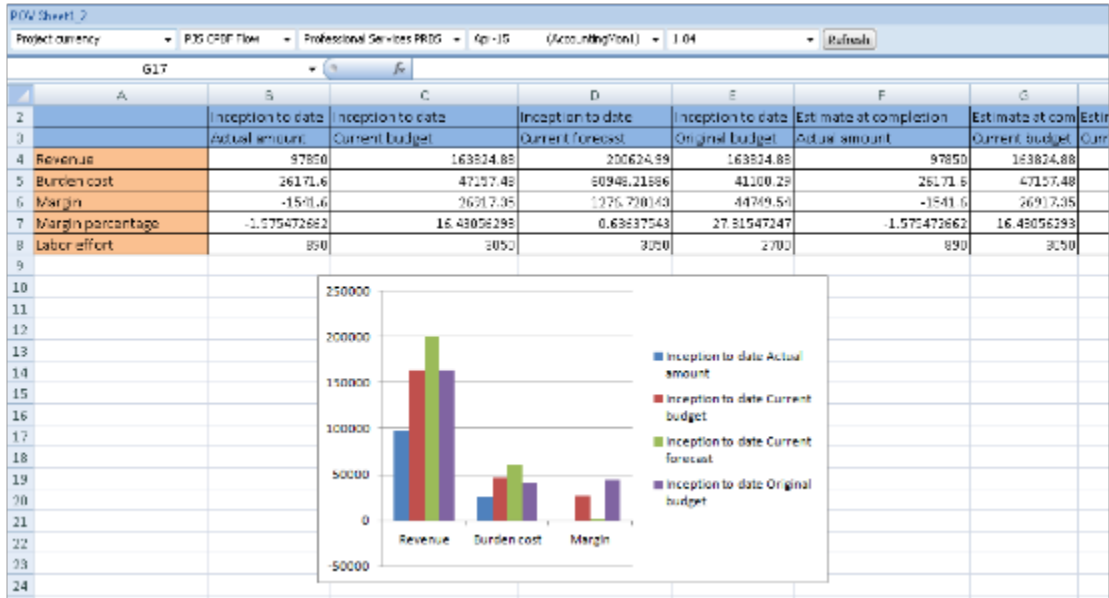
- [Set Up Oracle Smart View for Office](#)

## Use Oracle Smart View for Office to Analyze Project Performance

This topic provides an overview of the Oracle Smart View for Office tool to view reports. Smart View is a common Microsoft Office interface for Oracle Hyperion Essbase and provides robust and flexible reporting capabilities.

### Overview

Project Financial Management applications provide the ability to analyze project performance using Oracle Smart View for Microsoft Office.



## Key Insights

Using Smart View, you can:

- Create custom reports to review your project performance.
- View data in a table or graph.
- Use the following dimensions to analyze your project metrics.
  - Scenario, for example, ITD, PTD, and so on.
  - Time, for example, a week, month, and so on.
  - Resource, for example, a specific resource or all resources.
  - Task, for example, a specific project task or all tasks.
  - Currency, for example, project currency, ledger currency, and so on.
  - Account, for example, revenue, margin, effort, and so on.

## Frequently Asked Questions

The following table lists frequently asked questions about this tool.

FAQ	Answer
How do I find this tool?	Microsoft Excel - Smart View
Who uses this tool?	<ul style="list-style-type: none"> <li>• Project Accountant</li> <li>• Project Manager</li> </ul> Smart View data is secured by project and expenditure business unit.
When do I use this tool?	When you need to:

FAQ	Answer
	<ul style="list-style-type: none"> <li>• Analyze project, task, and resource assignment data by period for planned and actual costs.</li> <li>• View, import, manipulate, distribute and share data in Microsoft Excel, Word and PowerPoint interfaces.</li> <li>• Access and integrate Oracle's Enterprise Performance Management and Business Intelligence content from Microsoft Office products.</li> <li>• Have additional flexibility to perform ad hoc analysis to investigate and understand complex data.</li> <li>• Drill down into lower levels of detail as needed.</li> </ul>
<p>What can I do with this tool?</p>	<p>You can:</p> <ul style="list-style-type: none"> <li>• Create custom reports, save them as templates, and share them with stakeholders.</li> <li>• Leverage Microsoft Excel capabilities to perform real-time data analysis.</li> <li>• Analyze project performance, for example, report on planned and actual costs by project, task, resource, and period.</li> </ul>
<p>What type of tool is this?</p>	<p>Oracle Hyperion Smart View</p>

*Related Topics*

- [Set Up Oracle Smart View for Office](#)
- [Overview of Smart View](#)

