

# Oracle Fusion Cloud Project Management

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**Project Performance Agent  
Assistants**



Oracle Fusion Cloud Project Management  
Project Performance Agent Assistants

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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

Some application pages have help icons  to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

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Thanks for helping us improve our user assistance!



# 1 About the Project Performance Agent Assistants Guide

## What's Included in the Project Performance Agent Assistants Guide

This guide explains how to use the following project performance agent assistants:

- *Program Progress Summary Generator*
- *Program Performance Advisor*



# 2 Program Progress Summary Generator

## About Program Progress Summary Generator

This topic provides an overview of the Program Progress Summary Generator and explains how it helps program managers create AI-generated program status summaries.

### What this feature does

Program Progress Summary Generator drafts concise status summaries for project programs. The generated summary highlights key achievements, insights, risks, and recommendations. Program managers can review the draft, make changes, and finalize it.

### What this feature supports

This feature supports program managers who need to create status summaries faster and with less manual report writing.

### What this feature does not support

This feature does not replace program management review or approval. It generates a draft summary that you still need to validate before sharing.

**Note:** This capability was previously delivered in Prompt Lab as Project Program Status Summary Generation. In 26C, it is migrated to Fusion AI Agent Studio.

## Enable Program Progress Summary Generator

This topic provides the steps to enable the feature and grant access to the roles that need to use it.

### Before you start

Make sure you have access to the Opt In UI and the Security Console.

### Opt-in and Role Configuration Tasks

1. Enable the FSM opt-in for **Project Program Status Summary Generation**.
2. Open **Navigator > Tools > Security Console > Roles**.
3. Search for the job role you want to use with the feature and select **Edit Role**.
4. On the Role Basic Information page, select **Enable Permission Groups**, and confirm your choice.
5. Open the **Role Hierarchy** step.
6. If needed, go to the **Roles and Permission Groups** tab and add the feature-specific duty role and any required runtime duty role.

7. Click the Summary tab, then **Save and Close**.

If your organization uses custom roles, add the appropriate feature-specific AI assistance duty role to those custom roles and enable permission groups for those roles in the Security Console. For details on doing so, see [Creating Custom Roles to Enable Access to Project Financial Control Agents](#).

## Access requirements

The feature uses the following access elements:

- Program Progress Summary Generator duty role:  
ORA\_PJS\_PROGRAM\_PROGRESS\_SUMMARY\_GENERATOR\_DUTY
- Manage Project Program privilege: PJS\_MANAGE\_PROJECT\_PROGRAM

These are included with the seeded **Program Manager** job role.

# Generate a Program Progress Summary

This topic provides the steps to generate a program status summary from a report template.

## Before you start

Make sure the feature is enabled and you have access to the report template that contains the Program Executive Update catalog item.

## Steps to Generate a Program Progress Summary

1. Open an existing report template or create a new one.
2. Add the **Program Executive Update** catalog item to the template.
3. Refresh the report data.
4. Generate the summary.
5. Review the draft summary.
6. Edit the text as needed.
7. Finalize the summary.

## What the summary includes

The generated summary can include:

- Key program metrics
- Key achievements
- Insights
- At-risk projects
- Recommendations

**Note:** The quality of the generated summary depends on the quality of the source data. For the best results, make sure your project and program details are complete and current, including budgets, forecasts, action plans, and clear names and descriptions.

## Review and Finalize the Summary

This topic provides guidance for reviewing the generated summary before you share it with stakeholders.

### What to review

Check that the summary:

- Reflects the current status of the program
- Accurately identifies key risks and at-risk projects
- Includes relevant recommendations
- Uses clear language for stakeholders

### What to do next

Edit the generated text if needed, then save or finalize the summary for use in your reporting process.

**Note:** The generated summary is intended to reduce manual writing, not replace program manager review.



# 3 Program Performance Advisor

## About Program Performance Advisor

This topic provides an overview of Program Performance Advisor, including what it helps program managers do and what to expect from the AI-generated program insights.

### What Program Performance Advisor does

Program Performance Advisor helps program managers analyze program performance with Oracle AI and turn insights into action. The feature can:

- Summarize the current state of a program.
- Identify up to 5 critical projects that need immediate attention.

**Note:** The returned list of projects may not be exhaustive. Program managers should continue to review the full program portfolio where needed.

- Provide recommendations that help program managers respond quickly.
- Support action planning with pre-filled descriptions and action items.

**Note:** This capability was previously delivered in Prompt Lab as *Project Program Analysis and Action Plan Generation*. In 26C, it is migrated to Fusion AI Agent Studio.

### What Program Performance Advisor does not do

Program Performance Advisor does not replace program management decisions. It helps surface trends, highlight areas that need attention, and accelerate planning.

### Business benefits

Program Performance Advisor helps you:

- Make informed decisions using timely insights.
- Identify issues before they escalate.
- Reduce manual analysis and focus on strategic work.

### Language support

You can interact with AI agents using the language you selected when signing in to Oracle Fusion Cloud Applications.

# Enable and Secure Program Performance Advisor

This topic provides the setup and security steps required to make Program Performance Advisor available to users.

## Before you start

Confirm that your environment includes:

- The Project Financial Management offering.
- Access to the Opt In UI.
- Access to the Security Console.

## Steps to Enable the Feature

1. Open the Opt In UI.
2. Enable **Project Program Analysis and Action Plan Generation**.
3. Save your changes.

## Steps to Secure Access

1. Navigate to **Navigator > Tools > Security Console** and select **Roles**.
2. Search for the job role that you want to use with the feature.
3. Open the role and select **Edit Role**.
4. On the Basic Information page, select **Enable Permission Groups**, and confirm the change.
5. Open the **Role Hierarchy** step.
6. If required, add the feature-specific duty role and any required runtime duty role on the **Roles and Permission Groups** tab.
7. Select Summary, then **Save and Close**.

## Custom Roles

If your organization uses custom roles, add the appropriate feature-specific AI assistance duty role to those custom roles and then enable permission groups for those roles in the Security Console. For details on doing so, see [Creating Custom Roles to Enable Access to Project Financial Control Agents](#).

## Access Requirements

Users need the following:

- Program Performance Advisor (ORA\_PJS\_PROGRAM\_PERFORMANCE\_ADVISOR\_DUTY) duty role.
- Manage Project Program (PJS\_MANAGE\_PROJECT\_PROGRAM) privilege.

These are included in the seeded **Program Manager** job role.

**Note:** Both new and existing customers must opt in to use this feature. Once the feature is enabled, users with the required access can immediately review program insights.

# Use Program Performance Advisor

This topic provides the steps for reviewing AI-generated program insights and turning them into follow-up actions.

## Before You Start

Make sure that:

- You have opted in to the feature.
- You have the required access privileges and duty role.
- Your program and project data is complete enough to support meaningful analysis. This includes data related to current budgets, forecasts, action plans, status updates, project/program names, descriptions, and any relevant performance metrics.

## Steps for Using Program Performance Advisor

1. Open the program you want to review.
2. Select the **Insights** button.
3. Review the program overview and the key insights that are returned.
4. Review the critical projects that need attention.
5. Choose the next action for each project:
  - **Add to Watchlist** to monitor the project closely.
  - **Create Action Plan** to generate a plan for addressing the issue.
  - **View Details** to review the underlying analysis.
6. Review the generated action plan content.
7. Save or apply the plan as needed in your workflow.

**Note:** Program Performance Advisor can identify up to 5 critical projects at a time. The quality of the insights depends on the quality and completeness of the program and project data, including budgets, forecasts, action plans, names, and descriptions.

# FAQs for the Program Performance Advisor

## Why do I not see Program Performance Advisor?

Check that the feature is opted in, the role has permission groups enabled, and the required duty role and privilege are assigned.

## Why are the insights in English?

You can interact with AI agents using the language you selected when signing in to Oracle Fusion Cloud Applications. To view insights in English, sign out of your current session and sign in again using English as your preferred language.

## Why are the insights not very specific?

Review the quality of the source data. More complete budgets, forecasts, action plans, and project and program descriptions usually improve the result.