Oracle Fusion Cloud Project Management

Questions and Answers

FA Latest

Oracle Fusion Cloud Project Management
Questions and Answers

FA Latest

G36301-01

Author: Gireesh Kumar

Contents

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.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Questions and Answers

Can I change the project schedule (calendar) for existing projects?

Yes. Open your project and navigate to Manage Project Details to search for and select a different calendar.

Related Topics

- Create Calendars for Projects and Resources

Can I rename a planning resource in the working budget after creating a baseline version?

After you create a baseline version of the budget that's enabled for budgetary control, the names of existing planning resources become fixed. This is because these resource names are already integrated into the control budgets to create the control budget account segments.

> **Note:** You can add planning resources to the primary planning resource breakdown structure, and add the new resources to the working budget version.

How do I enable users to run the Import Assignment Labor Schedules process?

To run the Import Assignment Labor Schedules process successfully, one needs the Run Import Assignment Labor Schedules security privilege. This privilege is included in the Project Application Administrator and Application Implementation Consultant roles.

To assign this privilege to a user, create a custom role by copying an existing role and adding the **Run Import Assignment Labor Schedules** privilege. This privilege is not associated with any specific labor distribution related role out of the box.

How do I prevent automatic role assignment to project resources?

Preventing automatic role assignments goes a long way in reducing licensing costs and unnecessary manual effort.

To avoid having roles automatically assigned to users, you can create new project roles not associated with any enterprise roles.

How do I review budgetary control fund status results?

Budgetary control funds status indicates the validation result of the transaction amount against the budget amount. You can set budgetary control for a project, task, resource, award, and funding source segments.

If a project is enabled for budgetary control and the business unit or ledger is also enabled for budgetary control, then a baselined budget version that's created using a budgetary control enabled financial plan type must exist for transactions that must be subjected to project budgetary controls. The following transactions are validated for funds:

- Purchase orders to an inventory destination and direct procurement of materials to a work order destination
- Transfer order expense costs
- Expense related requisitions
- Expense related purchase orders
- Supplier invoices (includes variances, prepayments, and application of prepayments)
- Expense related purchase order receipts
- Project cost transactions (created with Oracle Projects or third-party application source and imported using the Import Costs process)

The following transactions aren't validated for funds:

- Work order costs excluding costs for direct procurement of materials to a work order destination
- Sales order costs
- Miscellaneous inventory issues
- Transfer order inventory costs
- Burden cost amounts for spend authorizations
- Payments
- Cross-charge transactions
- Transactions that are excluded for the ledger or business unit in the Manage Budgetary Control page.

Reviewing Funds Status Results

You can review transaction and budget level budgetary control results on the following pages listed in the table.

Page	Section	Action
Manage Unprocessed Costs This page displays funds check results at the transaction level.	Search Results	1. Select the transaction row. 2. Click the **Failed** icon in the **Funds Status** column to open the **Funds Reservation** window. Alternatively, 1. Select the transaction row. 2. Click the **View Results** option from the **Actions** menu.
Manage Project Costs This page displays: • Cost and cost adjustments made to transactions. • Results at the transaction level.	Search Results	1. Select the transaction row. 2. Click the **Failed** icon in the **Funds Status** column to open the **Funds Reservation** window. Alternatively, 1. Click the transaction number. 2. Click the **Adjustment History** tab on the **Expenditure Item** page. 3. Click **View Budgetary Control Results** in the **Adjustment Errors** region to open the **Funds Reservation** window. Else, 1. Select the transaction row. 2. Click the **View Results** option from the **Actions** menu.
Manage Project Costs If the original transaction passes budgetary control validations but the adjustments: • Pass with warning, then the overall status is Warning. • Fail, then the overall status is Passed. Cost distribution lines aren't generated for the transactions that fail budgetary control validations.	Errors	1. Select the transaction row in the **Search Results** region. 2. Click **View Budgetary Control Results** in the **Errors** region to open the **Funds Reservation** window.
Manage Cost Distributions This page displays: • Cost and cost adjustments made to transactions. • Results at the distribution level.	Search Results	1. Select the transaction row. 2. Click the **Failed** icon in the **Funds Status** column to open the **Funds Reservation** window. Alternatively, 1. Click the transaction number. 2. Click the **Adjustment History** tab on the **Expenditure Item** page. 3. Click **View Budgetary Control Results** in the **Adjustment Errors** region to open the **Funds Reservation** window.
Diagnostic Dashboard	Diagnostic Test Run Status	Generate the Project Budgetary Control Validation and Balance Activities diagnostic report.

By default, transaction-level results are displayed in the secondary window. You can change the view to display budget-level results.

Understanding Funds Status Results

The following table describes funds status results of budgetary control on cost transactions.

Status	Description
Blank	Transaction isn't eligible for funds check or transaction isn't validated for funds.
Passed	Transaction successfully passed funds check.
Failed	Transaction failed funds check.
Warning	Transaction passed funds check with warnings.

Failure Scenarios for Funds Check

> **Note:** When the funds check fails, first identify if the failure is in the Project Management control budget or the General Ledger control budget and then take the appropriate action to resolve the error.

The following table lists the scenarios in which transactions that are enabled for budgetary control validation can fail funds check.

Failure Scenario	Resolution
No control budget exists	Navigate to the Manage Budget Versions page, create a control budget by setting the budget to baseline, and then trigger the funds check from the respective transaction page. • The budget version should be enabled for budgetary control and must be created using a financial plan type that's enabled for budgetary control. • For a project that's enabled for budgetary control, the control budget exists only if the budget is created using a budgetary enabled financial plan type and set to baseline.
Control budget is created but the budget date is outside the control budget date range	For a non-sponsored project, you must either change the budget date or project dates and set the budget to re-baseline such that the control budget dates are updated. For a sponsored project, you must either change the budget date or the dates of the project and the award, and then submit the date changes from the Edit Award Details page.
Control budget is created but the transaction amount is higher than the available budget	Reduce the amount charged on the transaction or increase the budget amount.
Control budget is created but the control budget is in closed or permanently closed status.	For a closed control budget, you will need to redefine the control budget. For a permanently closed control budget, you can't redefine and have to use another project.

<table>
<tr><th>Failure Scenario</th><th>Resolution</th></tr>
<tr><td></td><td></td></tr>
<tr><td>Control budget is created but the control budget period is closed or permanently Closed status.</td><td>
For a permanently closed control budget period, you can't reopen and have to use another project.
For a closed control budget period, you need to reopen the control budget period. To open the control budget period:

Click Navigator>Budgetary Control.
Click the Budget Period Statuses task in the panel drawer.
Search for the control budget and then click the name of the control budget for which you want to edit the budget period status.
Note: Use the first few characters of the project number to search for the control budget.
Select Open from the Status drop-down list, and click Save and Close.

Note: By default, all users don't have access to the control budget. You can grant control budget data access to users using the Manage Control Budget Data Access for Users task in the Setup and Maintenance work area.
</td></tr>
<tr><td>Burden enabled project but the burden schedule is inactive.</td><td>Build the burden schedule for the project.</td></tr>
<tr><td>Burden enabled project with an active burden schedule but the burden multiplier for a particular expenditure type is not present.</td><td>Provide the burden multiplier for that exception type.</td></tr>
<tr><td>The transaction failed budgetary control validation with one or more errors.</td><td>

If you see the missing currency conversion information on transaction error for cost transactions, then ensure that the currency conversation attributes are defined in the Budgetary Control settings of the planning options for the plan version. After you define the currency conversion attributes, set the budget to baseline, and then import the cost transactions.
If the requesting amount is more than the available budget amount, then increase the budget amount such that the costs get processed. However, if the costs can be reduced, then you can choose to reduce the budget amount being processed and reserved.
If the transaction fails for the General ledger control budget indicating that the budget account can't be derived, then ensure that a budget account is derived using the Transaction Account Definition (TAD) rules.

Even if the project isn't enabled for budgetary control, the application derives the budget account from the Transaction Account Definition and triggers funds check. So, create a Transaction Account Definition, map the accounting rules, activate it, and then associate it to a ledger to derive the budget account using the account rule assignments.
Don't use the seeded Transaction Account Definition. Create one by duplicating the existing one.

</td></tr>
<tr><td>Insufficient Funds</td><td>
Check for the available funds and then take the appropriate corrective action. For example, the corrective action could be to increase the project budget with the missing amount and re-baseline or limit the transaction to the available amount.
Note: For sponsored projects, you can check the budgetary control balances on the Award Overview page. For non-sponsored projects, use the Budgetary Control Analysis Report to check the budgetary control balances.
</td></tr>
<tr><td>The account rules assigned to the transaction account type are insufficient to</td><td>If you're using mapping sets, then verify the mapping set input and output values defined in the subledger accounting setup and edit these values as appropriate. For more information, see Mapping Sets and How You Define Mapping Sets.</td></tr>
</table>

Failure Scenario	Resolution
derive a value for any of the segments of the chart of accounts.	

Budgetary Control Funds Status: Tips and Considerations

- Project costs created from allocation rules are not subject to budgetary control.
- To avoid duplicate consumption of a budget, separate line summary burden transactions are considered to have already consumed the burden along with the source transaction, preventing them from separately consuming additional budget.
- Third-party commitments are not subject to funds check.

How can I set up a home page of my preference in the Awards work area?

Follow these steps:

1. At the top of your Home page, click the icon that shows you're signed in to open the **Settings and Actions** menu. Below the sign out item find the Personalization region and click **Set Preferences**.

2. Click **Project and Grants Management Preferences**.

3. In the **Awards** section, select Award Overview or Manage Awards from the **Home Page** drop-down list.

The next time you navigate to the Awards work area, the selected home page is displayed.

How can I update my profile photo?

Team members can change their picture on the Team Member Dashboard. From the home page, navigate to Projects > Team Member Dashboard. Find the My Profile region and click the Edit My Profile link. Then click the current profile photo to open the Upload Photo window and browse for a new photo.

Project application administrators can update any profile photo when they create or edit a labor resource on the Manage Project Enterprise Resources page.

Why do I get an 'Assignment isn't classified as a project expenditure organization' error when entering time cards?

To ensure smooth time card submission using the user interface or FBDI, verify that the department associated with the assignment is set up as a project expenditure organization.

Use the Manage Organization Hierarchies and Classifications setup and maintenance task to cross-check the expenditure organization hierarchy of the business unit and ensure that it's configured correctly for the entry date.

If issues persist, see 'The department for the reported assignment is not set up as a project expenditure organization, error during Time Card Entry (Doc ID 2231474.1)'. This document provides further guidance on resolving common problems related to time card submissions, including steps to identify and rectify the specific issue you're facing.

Why do I get a 'Costing rule can't be found' error when managing my project's finances?

You typically see this error when you haven't set up costing rules for labor transactions.

To resolve this issue:

1. Use the **Setup and Maintenance > Manage Rate Schedules** task to create a rate schedule of the type Resource Class.
2. Enter a rate schedule line for the resource **Labor**, select a rate set, and click **Save and Close**.
3. Use the **Manage Project Plan Types > Rate Settings** section to select this new rate schedule for the **Resource Class Raw Cost Rate** field, and click **Save and Close**.
4. Refresh rates for the project plan again, and you shouldn't see this error.

Why are my project pay elements not visible after being set up in Oracle Fusion Payroll?

To display project pay elements on the Manage Project Payroll Elements page, verify that the pay elements are configured for costing in the HCM application.

This step is necessary because the **Oracle Fusion Payroll** transaction source is used in the Import Payroll Costs process. A **<Name of the flag, please?>** flag in HCM indicates whether a pay element is set up for costing. If this flag isn't enabled for a pay element, it won't appear in the Manage Labor Schedules work area when the **Costed Only** option is selected.

Why do program managers see a connection error when they save changes to a program?

This typically happens when program managers do not have the required privileges and related security criteria.

To check and assign them the required role and security criteria:

1. Go to the **Setup and Maintenance > Manage Data Role and Security Profiles** task.
2. Click on the role assigned to the program manager users who aren't able to save programs. This could be the Employee role or a custom role that you created for program manager users. Click **Edit**.
3. Navigate to the Security Criteria section and ensure that the role has the **ORA_PER_REST_SERVICE_ACCESS_PUBLIC_WORKERS_RO** privilege.
4. Save your changes.

Why isn't the updated legal entity name reflecting in the Manage Project Organization Classification page?

If the effective date you are using to view the data on the Manage Project Organization Classification page is before the effective start date of the Legal Entity name change, the system will display the old Legal Entity name as it was valid at that point in time. Conversely, if the effective date used for viewing is on or after the date the Legal Entity name change became effective, the new name will be displayed.

When should I use contribution percentages in project contracts?

Contribution percentages can be used with single contract or multi-contract funding scenarios. For example:

1. A single contract has been established where the customer will only pay for a fixed portion of the billable project costs.
2. Multiple contracts with one or more customers have been established where each contract contributes a percentage towards the billable project costs.

In both scenarios, the contribution percentages don't have to sum to 100%.

Contribution percentages only apply to bill transactions arising from project costs, and not milestones or billing events.

Note: Contribution percentages are intended to reflect real-world contracts, and not a dynamic allocation of charges such as recurring services billing, where service usage metrics drive the allocation percentages.Therefore, contribution percentages are typically expected to be:

- Fixed for the duration of a contract, changing by exception through renegotiation between the supplier and customer.
- Limited to a few contracts per project, where contractual percentages are significant. For example, a 60:40 split between two customers.

Deviations may result in:

- A high frequency of contract amendments, which can give rise to performance issues.
- The need to build integrated solutions to maintain contracts, as doing so manually becomes unviable.
- Marginal contribution percentages, which result in zero-amount billing exceptions or rounding issues.

Why are item, quantity, unit of measure, and unit price attributes not populated on item-based project contract invoice lines?

The attributes are not populated on the item-based project contract invoice line because the **Item** or **Item Description** invoice line grouping attributes haven't been added to the event invoice format.

To populate the attributes:

1. Set up a new event invoice format, or update an existing one.
2. In the Setup and Maintenance work area, use the **Manage Invoice Formats** task to add **Item** or **Item Description** as invoice line grouping attributes to the invoice format.
3. Associate the new event invoice format with the bill plan linked to the project contract line.
4. Enter item-based billing events for the project contract and its associated contract line.
5. Run the Generate Invoices scheduled process for the project contract, and review the invoice lines on the draft project contract invoice.