Oracle Fusion Cloud Project Management

Detailed Adoption Guidance: Project Planning Workspace

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1 Introduction

About this Guide

Use this guide to configure, validate, and operate Project Planning Workspace. The workspace helps project managers assess qualified opportunities, create projects from opportunities or supporting documents, generate detailed task-and-resource budgets, staff approved labor demand, and review Priority Actions and Planning Priorities.

Project managers review recommendations and confirm actions when required before a project is created or a budget or staffing update is applied or saved.

This guide is for application administrators and security administrators who configure and secure Project Planning Workspace. Project managers can use this guide to understand workspace capabilities, review supported planning actions, and confirm recommended updates.

Project Planning Workspace Overview

Project Planning Workspace brings policy-guided planning capabilities into one workspace. Depending on the planning activity and configured policies, it can display planning priorities, present recommendations for review, or support actions that you initiate.

When review or confirmation is required, you confirm the action before a project, budget, or staffing update is applied or saved.

Project Planning Workspace Capabilities

Project Planning Workspace brings the following capabilities into one guided workspace. Each capability remains subject to the configured organizational policies and the user's assigned access.

Capability	What You Can Do
Planning priorities	Review Priority Actions and Planning Priorities for work that requires review or immediate action, such as a project that needs detailed budget generation.
Opportunity cost estimation and proposal generation	Assess an eligible sales opportunity with a policy-guided cost or effort estimate, review revenue and margin, refine the estimate using supported natural-language interactions, and generate a comprehensive project proposal after review.
Project creation	Create a project from a sales opportunity or supporting business documents. Review the extracted objectives, scope, milestones, schedule, resources, and financial information before confirming project creation.
Detailed budget planning	Break down an approved strategic budget into task-and-resource allocations. Review the allocation, reserve, revenue, margin, and policy exceptions before creating a detailed budget.

Capability	What You Can Do
Labor resource requests and staffing	Automatically assign qualified people with available capacity to approved labor demand when policy conditions are met. Review recommendations, confirm suitable matches for staffing, or initiate a resource request when no suitable person is available.

Solution Components

The solution components provide the workspace experience, access, natural-language interactions, and policy controls.

Solution Component	Implementation Role
Project Planning Workspace	Provides prioritized planning work, project initiation, detailed-budget planning, and labor-resource-request experiences.
ERP Agents menu	Provides the navigation entry point to Project Planning Workspace.
Ask Oracle	Supports natural-language interactions for project initiation and refinement of supported planning recommendations.
Policy configuration	Defines the business rules, recommendation criteria, guardrails, and readiness conditions for enabled workspace capabilities.
Security and access configuration	Controls workspace access and the capability-specific duties, privileges, permission groups, and data access available to users.

How Project Planning Workspace Works

Project Planning Workspace uses planning data and configured policies to display policy-driven information, present reviewable recommendations, or support actions that you initiate. You can review completed planning information, revise supported recommendations, and confirm actions when required by policy.

Capability	Planning Inputs and Policy Scope	What Project Planning Workspace Does	What You Can Do and the Outcome
Planning priorities and actions	Opportunity, proposal, project, budget, and staffing status; applicable thresholds; due dates; and priority rules.	Identifies planning work that requires attention and displays it as a Priority Action or Planning Priority.	Review the action, determine the required planning work, and complete or defer it.
Opportunity cost estimation and proposal generation	A qualified sales opportunity; configured estimation method; response-window, revenue, margin, and reference-project rules.	Produces a policy-guided cost or effort estimate and evaluates the related revenue and margin position.	Review and refine the estimate using supported natural-language interactions. Generate a comprehensive project proposal after review.
Project creation	A sales opportunity or supporting document; applicable businessAn	Extracts available project information, selects an eligible	Review and correct the draft, revise using natural-language

Capability	Planning Inputs and Policy Scope	What Project Planning Workspace Does	What You Can Do and the Outcome
	approved strategic budget; project tasks and resources; applicable reserve, margin, and detailing rules; and, when required, relevant past projects.-unit configuration; project templates; and initiation and approval rules.	template, and prepares a project draft with objectives, scope, milestones, schedule, resources, and financial information.	instructions, and confirm project creation.
Detailed budget planning	An approved strategic budget; project tasks and resources; applicable reserve, margin, and detailing rules; and, when required, relevant past projects.	Prepares a task-and-resource allocation, calculates reserve, revenue, and margin values, and identifies policy-sensitive exceptions.	Review and refine the allocation using supported natural-language interactions. Confirm the draft, baseline, or other permitted writeback action.
Labor resource requests and staffing	Approved labor demand; role or job requirements; candidate qualifications, capacity, and evidence; and applicable staffing rules. When the matching scenario uses time-phased demand, the demand must be time phased.	Matches approved labor demand with qualified people who have capacity. Depending on the configured policy, the workspace can automatically assign a suitable person to the project or present a recommendation for project manager review. Project managers can confirm suitable matches for staffing or initiate a resource request when no suitable person is available.	Review candidate evidence, confirm a suitable match when required, or review and send the resource-request communication when no suitable person is available.

Implementation Considerations

Use these considerations when you configure and validate Project Planning Workspace:

- Configure policies by business unit so that workspace recommendations align with your organization's approved planning rules.
- Use sample configuration values as starting points only. For example, configure the opportunity win-probability and status criteria, reserve percentage, project margin, qualification threshold, planning due dates, and priority windows to reflect your organization's requirements. For more information, see *Configure Project Planning Workspace*.
- During validation, confirm that generated project plans, cost estimates, proposal information, budget allocations, and staffing recommendations meet your organization's business requirements and conform to the configured policies.
- For end-user review, refinement, and confirmation instructions, see *Using Project Planning Workspace*.

2 Before You Start

Identify Prerequisites

Complete the prerequisites that apply to the capabilities that your organization enables.

- Project Planning Workspace Policy (ORA_PRJ_PJO_PROJECT_PLANNING_WORKSPACE_POLICY). For more information, see *Configure Project Planning Workspace Policy*.
- Project Budget Detail Policy (ORA_PRJ_PJO_PROJECT_BUDGET_DETAIL_POLICY). For more information, see *Configure Detailed Budget Planning*.
- Project Initiation Governance and Approval Policy (ORA_PRJ_PJF_PROJECT_INITIATION_GOVERNANCE). For more information, see *Configure Project Creation*.
- Project Cost Estimation and Proposal Evaluation Policy (ORA_PRJ_PJF_PROJECT_COST_ESTIMATION_PROPOSAL_EVALUATION_POLICY). For more information, see *Configure Oppurtunity Cost Estimation and Proposal Generation*.
- Project Labor Resource Request Policy (ORA_PRJ_PJO_PROJECT_LABOR_RESOURCE_REQUEST_POLICY). For more information, see *Configure Labor Resource Requests and Staffing*.

For each applicable policy, configure the documented values for the business unit and capability that you enable. Use a separate configuration when business-unit planning rules differ.

Configure Capability-Specific Prerequisites

Complete the prerequisites for the capabilities that your organization plans to enable.

Opportunity-Driven Planning

- For opportunity-driven project creation, cost estimation, or proposal generation, make eligible Oracle CX Sales opportunity data available to Project Planning Workspace.

Labor Resource Requests and Staffing

- Set up the resource pools used to fulfill labor resource requests.
- Configure project roles and their qualifications using the Manage Project Roles task in the Setup and Maintenance work area before matching people based on role qualifications.
- If you enable named-person staffing, confirm that the primary planning resource breakdown structure supports named-person planning.
- If the matching scenario uses time-phased labor demand, confirm that the financial project plan is time phased.
- Run or schedule the Maintain Project Resource Search Index Job Set before matching requests that use qualifications, proficiency, resume text, or keywords. Verify that the job set completes successfully. The job set indexes existing managed project enterprise labor resource data for matching; it doesn't import HCM people.

Verify Solution Readiness

Confirm that the applicable policies are configured, permission groups are enabled for applicable roles, and users have the capability-specific roles, duties, privileges, and data access. Then navigate to Project Planning Workspace from the ERP Agents menu.

Assign Required Roles and Access

Assign the required roles, privileges, permission groups, and data access to users based on the Project Planning Workspace capabilities that they use.

Assign General Workspace Access

Users must have Project Planning Workspace Duty (ORA_PJO_PROJECT_PLANNING_WORKSPACE_DUTY) to access Project Planning Workspace.

1. In Security Console, select **Roles**.
2. Search for and select the custom role assigned to workspace users.
3. Click **Edit Role**.
4. On the Role Hierarchy tab, select **Roles and Permission Groups**.
5. Click **Add Role**.
6. Add **Project Planning Workspace Duty** (ORA_PJO_PROJECT_PLANNING_WORKSPACE_DUTY).
7. Enable the applicable permission groups for the custom role.
8. Save the role changes and complete the required security synchronization.

Users must also have the functional privileges, duty roles, permission groups, and data access required for the capabilities that they use.

Opportunity Cost Estimation and Proposal Generation

Users who create opportunity cost estimates or project proposals must have the following functional privilege and data access.

Privilege Name	Privilege Code	Data Access Resource Name	Data Access Action	Included in Predefined Project Manager Job Role
View Opportunity	MOO_VIEW_ OPPORTUNITY_PRIV	Opportunity (MOO_OPTY)	View Opportunity	No

The following duty roles are also required:

Duty Role	Code
Project Inquiry	ORA_PJF_PROJECT_INQUIRY_DUTY
Project Budget Inquiry	ORA_PRJ_PROJECT_BUDGET_INQUIRY_DUTY

These duty roles are included in the predefined Project Manager job role (ORA_PJF_PROJECT_MANAGER_JOB). For custom roles, edit the applicable role in Security Console and add these duty roles from the **Roles and Privileges** tab under **Role Hierarchy**.

Project Creation

Users who create projects must have the following functional privileges and data access.

Privilege Name	Privilege Code	Data Access Resource Name	Data Access Action	Included in Predefined Project Manager Job Role
Manage Project Planning Resource Breakdown Structure Version	PJF_MANAGE_PROJECT_PLANNING_RESOURCE_BREAKDOWN_STRUCTURE_VERSION_PRIV	Project (PJF_PROJECTS_ALL_VL)	Edit Project Resource Breakdown Structures for Project	Yes
Manage Project REST Service	PJF_MANAGE_PROJECTS_REST_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Projects REST Data	No
Manage Project Financial Plans Service	PJO_MANAGE_PROJECT_FINANCIAL_PLANS_SERVICE_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Project Task Structure	Yes

The following duty roles are also required for project creation:

Duty Role	Code
Project Inquiry	ORA_PJF_PROJECT_INQUIRY_DUTY
Project Foundation Setup Inquiry	ORA_PJF_PROJECT_SETUP_INQUIRY_DUTY

These duty roles are included in the predefined Project Manager job role (ORA_PJF_PROJECT_MANAGER_JOB). For custom roles, add these duty roles from the **Roles and Privileges** tab under **Role Hierarchy**.

Project Template Access

Users who create projects must have access to the applicable project templates. Add the **read: Project Template** permission group and associate the required Security View. This permission group isn't included in the predefined Project Manager job role.

- In Security Console, select **Roles**.
- Search for and select the custom role assigned to workspace users.
- Click **Edit Role**.
- Under **Permission Groups**, add **read: Project Template**.
- Select **read: Project Template** > **Details** > **Security Views.**
- Associate the required Security View.

Contract Line Creation

Users who create contract lines must have the following functional privileges and data access.

Privilege Name	Privilege Code	Data Access Resource Name	Data Access Action	Included in Predefined Project Manager Job Role
Create Contract	OKC_CREATE_CONTRACT_PRIV	Contract Header (OKC_K_HEADERS_ALL_B)	Manage Contract	No
Edit Contract by Web Service	OKC_EDIT_CONTRACT_VIA_WEB_SERVICE_PRIV	Contract Header (OKC_K_HEADERS_ALL_B)	Update; View Contract	No

Add the following permission groups to the custom role assigned to workspace users. For each permission group, associate the applicable Security View. These permission groups aren't included in the predefined Project Manager job role.

- read:Customer (oraErpCoreCustomerAccountSetup)
- read:Receivables Payment Term (oraErpCoreReceivablesSetup)
- read:Contract Type (oraCxSalesCommonContracts)

Project Creation from Oracle Sales Opportunities

Users who create projects from Oracle Sales opportunities must have the following functional privilege and data access, in addition to the project-creation access.

Privilege Name	Privilege Code	Data Access Resource Name	Data Access Action	Included in Predefined Project Manager Job Role
View Opportunity	MOO_VIEW_OPPORTUNITY_PRIV	Opportunity (MOO_OPTY)	Read	No

Detailed Budget Management

Users who manage detailed budgets must have the following functional privilege and data access.

Privilege Name	Privilege Code	Data Access Resource Name	Data Access Action	Included in Predefined Project Manager Job Role
Manage Project Financial Plans Service	PJO_MANAGE_PROJECT_FINANCIAL_PLANS_SERVICE_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Project Budget Working Version	Yes

The Project Budget Inquiry duty role (ORA_PRJ_PROJECT_BUDGET_INQUIRY_DUTY) is also required. This duty role is included in the predefined Project Manager job role (ORA_PJF_PROJECT_MANAGER_JOB). For custom roles, add this duty role from the **Roles and Privileges** tab under **Role Hierarchy**.

Labor Resource Requests and Staffing

Users who create or fulfill labor resource requests, match resources, or staff project demand must have the following functional privileges and data access.

Privilege Name	Privilege Code	Data Access Resource Name	Data Access Action	Included in Predefined Project Manager Job Role
Manage Project Resource Requests	PJR_MANAGE_PROJECT_RESOURCE_REQUESTS_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Project Work Plan Data	Yes
Fulfill Project Resource Requests	PJR_FULFILL_PROJECT_RESOURCE_REQUESTS_PRIV	Not applicable - access is scoped by owned resource pools	Not applicable	No
Manage Project Work Plan	PJT_MANAGE_PROJECT_WORK_PLAN_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Project Work Plan Data; Manage Project Work Plan Resource Assignments Data	Yes
Manage Project Plan Resource Assignment	PJO_MANAGE_PROJECT_PLAN_RESOURCE_ASSIGNMENT_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Project Task Structure	Yes
Manage Project Planning Resource Breakdown Structure Version	PJF_MANAGE_PROJECT_PLANNING_RESOURCE_BREAKDOWN_STRUCTURE_VERSION_PRIV	Project (PJF_PROJECTS_ALL_VL)	View Project Resource Breakdown Structures for Project	Yes

Privilege Name	Privilege Code	Data Access Resource Name	Data Access Action	Included in Predefined Project Manager Job Role
Assign Project Resource to Project	PJT_ASSIGN_PROJECT_RESOURCE_TO_PROJECT_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Project Work Plan Data; Manage Project Work Plan Resource Assignments Data	No
Manage Project REST Service	PJF_MANAGE_PROJECTS_REST_PRIV	Project (PJF_PROJECTS_ALL_VL)	Manage Projects REST Data	No

The Financial Project Plan Inquiry duty role (ORA_PJO_FINANCIAL_PROJECT_PLAN_INQUIRY_DUTY) is also required to create labor resource requests. This duty role is included in the predefined Project Manager job role (ORA_PJF_PROJECT_MANAGER_JOB). For custom roles, add this duty role from the **Roles and Privileges** tab under **Role Hierarchy**.

Access to Fulfill Project Resource Requests is scoped by resource-pool ownership. Assign the workspace user as the Owner of each applicable resource pool. A Pool Manager assignment alone doesn't satisfy the resource pool ownership requirement. For more information, see *Configure Resource Pool Ownership*.

Determine the Implementation Approach

Select the policies and access model that match the workspace capabilities you enable. Use custom roles where the predefined Project Manager role doesn't supply the required privileges, and assign only the access required for the intended capability.

3 Configure Project Planning Workspace

Core Configuration

Configure Project Planning Workspace to define the policies, prerequisites, security, and data access required for the capabilities that your organization enables.

Complete the applicable policy and security configuration before testing the workspace. Configure only the capability-specific policies and access required for your implementation.

Configure Policy Configurations

Project Planning Workspace derives the applicable business unit from the logged-in user's business-unit assignment in HCM. Users don't select or switch the business unit in the workspace.

Create a Default configuration for each applicable policy. Create business-unit-specific configurations when planning rules differ by business unit. When a business-unit-specific configuration isn't available, the workspace uses the Default configuration.

Use the applicable policy to configure:

- Landing page prioritization, action visibility, and expiry behavior.
- Opportunity cost estimation and proposal generation.
- Project creation, budget generation, and contract creation.
- Detailed budget planning.
- Labor resource request and staffing behavior.

Configure Project Planning Workspace Policy

Configure Project Planning Workspace Policy to define the conditions that determine when the workspace displays Planning Priorities and Priority Actions.

Configuration Attribute	Purpose	Value	Allowed Values
Opportunity threshold for project initiation	Minimum opportunity win probability at which an opportunity is displayed for project manager evaluation and project initiation.	100%	0% to 100%
Opportunity status for project initiation	Opportunity status that allows project creation to begin.	Won	Valid opportunity status from the configured lookup
Opportunity threshold for proposal	Minimum opportunity win probability at which an opportunity is displayed for project manager evaluation and proposal planning.	60%	0% to 100%

Configuration Attribute	Purpose	Value	Allowed Values
Proposal due date	Number of days before the opportunity close date when proposal generation is due.	5 calendar days	Number of calendar days
Require detailed budgets	Determines whether budget detailing is required.	Yes	Yes, No
Budget detailing due date	Number of days before the project start date by which budget detailing is due.	10 calendar days	Number of calendar days
Surface staffing actions	Determines whether labor resource request actions are displayed.	Yes	Yes, No
Resource request due date	Number of days before the project start date when labor resource requests are due.	10 calendar days	Number of calendar days
Priority windows	Time remaining used to assign Critical, High, Medium, or Low priority.	Critical: 2 or fewer business days; High: 3 to 5 business days; Medium: 6 to 10 business days; Low: more than 10 business days	Customer-defined
Priority actions displayed	Maximum number of actions displayed prominently on the landing page.	3	1 to 5
Insight expiry period	Number of days after an action due date when an incomplete action is removed.	30 calendar days	Number of calendar days

Review these values when opportunity qualification criteria, proposal timelines, planning windows, resource lead times, or review thresholds change.

Configure Opportunity Cost Estimation and Proposal Generation

Configure Project Cost Estimation and Proposal Evaluation Policy to select the cost-estimation method and define the margin used to derive the revenue estimate.

Configuration Attribute	Purpose	Value	Allowed Values
Estimation Method	Mandatory initial control that selects the cost-estimation path.	Estimation Policy	Estimation Policy, Reference Project Method
Project Margin	Margin used to derive the revenue estimate from estimated cost.	10%	0% to 100%

When you select **Estimation Policy**, configure the approved estimation methodology and standards used to translate extracted opportunity quantities into effort and cost. These standards can include unit effort, delivery rates, and other approved assumptions.

When you select **Reference Project Method**, configure the criteria used to identify the approved past project whose cost amount is used as the starting estimate.

Set the estimation method before entering quantities, selecting standards, or calculating cost. Apply the project margin after establishing the estimated cost. Retain the source evidence, assumptions, reviewer, approver, and estimate version.

Configure Project Creation

Configure Project Initiation Policy to define project-creation, budget-generation, and contract-creation behavior.

Configuration Attribute	Purpose	Value	Allowed Values
Project template selection	Project templates available for project creation.	Configure applicable templates.	Valid project templates selected for each business unit
Default budget creation preference	Determines whether the workspace generates a project budget automatically.	Generate by default	Generate by default; Generate only when requested; Do not generate
Default contract creation preference	Determines whether the workspace generates a contract automatically.	Yes	Yes, No
Contract creation source	Source used when creating a new contract.	Duplicate existing contract	Duplicate an existing contract that meets the required customer, business-unit, or legal-entity criteria
Revenue-to-cost margin	Percentage of revenue retained as margin before calculating the cost budget.	20%	0% to 99%
Contract creation method	Determines whether the workspace creates a new contract or amends an existing contract.	Create a new contract	Create a new contract; Amend an existing contract
Contract amount association level	Level at which contract lines are created and associated with the project.	Project level	Project level; Task level
Task-level contract amount distribution method	Tasks that receive contract lines and the method used to distribute the total contract amount when contract amounts are associated at the task level.	Not applicable	Selected top-level tasks; All task-level contract lines; Not applicable

When the contract amount association level is **Project level**, the workspace creates a single contract line associated with the project-level task and assigns the entire contract amount.

When the contract amount association level is **Task level**, select whether the workspace distributes the contract amount across selected top-level tasks or all task-level contract lines.

Configure Detailed Budget Planning

Configure Project Budget Detail Policy to define reserve treatment, financial-plan selection, budget-detailing method, and reference-project selection.

Configuration Attribute	Purpose	Value	Allowed Values
Reserve percentage	Reserve applied before distributing the remaining budget.	10%	0% to 100%
Reserve placement	Hierarchy level that holds the reserve.	Project node	Project node; Named task
Reserve resource	Budget resource assigned to the reserve.	Configure a valid financial resource.	Any valid budget resource
Financial plan type	Financial-plan type used for cost and revenue scope.	Cost and Revenue Budget	Valid financial-plan type
Detailing method	Method used when the current plan isn't assignment ready.	Reference Project Method	Reference Project Method; Financial Plan
Reference project signal	Required structural matching signal for identifying eligible reference projects.	Configure the required matching signal.	Any project attribute
Reference project ranking order	Candidate precedence when multiple reference projects are eligible.	Latest created project	Any sortable project attribute

When the policy uses **Reference Project Method**, configure the matching signal and ranking order used to identify the reference project. When the policy uses **Financial Plan**, ensure that the selected financial-plan information provides the required budget basis.

Configure Labor Resource Requests and Staffing

Configure Project Labor Resource Request Policy to evaluate and fulfill labor resource requests.

Project Planning Workspace derives the applicable business unit from the logged-in user's business-unit assignment in HCM. Create a Default configuration, and create business-unit-specific configurations when staffing rules differ. If no business-unit-specific configuration applies, the workspace uses the Default configuration.

Configure Resource Pool Ownership

Assign each workspace user as the **Owner** of the applicable resource pool before they perform resource matching, resource-request fulfillment, or staffing.

1. In the **Setup and Maintenance** work area, search for and open the **Manage Resource Pools** task.
2. Select the applicable resource pool.
3. Assign the workspace user as the resource pool owner.

A **Pool Manager** assignment doesn't satisfy the resource pool ownership requirement. Access to fulfill resource requests is scoped by the resource pools that the user owns.

Configure Labor Resource Request Policy

The Project Labor Resource Request Policy has one customer-editable configuration attribute: Qualification Threshold. This threshold determines the minimum qualification score that a person must meet before being considered for assignment.

Configuration Attribute	Purpose	Value	Allowed Values
Qualification Threshold	Minimum qualification requirement before a person is considered for assignment.	Enter the approved threshold.	0% to 100%

Resource matching applies to approved, time-phased labor demand that remains planned by role or job. The project plan must use an eligible primary project resource breakdown structure (PRBS). Complete the applicable labor resource request and staffing prerequisites before starting resource matching.

How Labor Matching and Staffing Works

When a Project Manager starts resource matching, the workspace evaluates the approved, time-phased labor demand and project-role requirements. It uses available matching evidence to identify qualified people with capacity.

After the required project decision, the workspace creates named-person plan assignments. It replaces the applicable role or job hours with named-person hours and reconciles the assignments by task and period without changing the approved demand.

If required policy information, project setup, or matching evidence is missing, the workspace suppresses the affected action and identifies the configuration or data gap.

Configure Security and Access

Users must have the Project Planning Workspace Duty (ORA_PJO_PROJECT_PLANNING_WORKSPACE_DUTY) to access Project Planning Workspace. Enable the applicable permission groups for the custom role assigned to workspace users.

Then assign the capability-specific privileges, duty roles, permission groups, and data access required for the work that users perform.

Assign access only for the capabilities that your organization enables. For the Security Console procedure and capability-specific access requirements, see *Assign Required Roles and Access*.

4 Implementation Examples

Examples of Configuring Project Planning Workspace

These illustrative examples show how policy values can affect workspace behavior. Replace the sample values with values approved by your organization.

Calculate an Opportunity Cost Estimate

This example uses illustrative effort standards and a delivery-cost rate. Replace these values with the approved standards for your organization.

1. Select the **Estimation policy** cost-estimation method.
2. Configure a mobilization effort of 160 hours per functional workstream and a Functional Workstream standard of 500 hours per workstream.
3. Configure a delivery cost rate of USD 150 per hour.
4. Configure a project margin of 20%.
5. Configure an opportunity threshold for proposal generation of **70%**.
6. Save the policy configuration.
7. Create an Oracle Sales opportunity with a win probability of **70%** or higher. Attach a supporting RFP that identifies two functional workstreams.
8. Review the calculated effort, cost estimate, and revenue estimate.

Expected result: The workspace identifies the two functional workstreams in the supporting RFP. It calculates 320 mobilization hours (160 hours × 2 workstreams) and 1,000 Functional Workstream hours (500 hours × 2 workstreams), for a total of 1,320 hours. At USD 150 per hour, the estimated cost is USD 198,000. With a 20% margin, the workspace derives a revenue estimate of USD 247,500. If the calculated margin doesn't meet the configured requirement, the workspace displays the shortfall or prevents the estimate from proceeding, according to the configured policy.

Make a Sales Opportunity Available for Project Creation

1. For the Services business unit, set the opportunity status for project creation to **Won**.
2. Set the opportunity threshold for project creation to **70%**.
3. Set the High priority window to apply when the required action is due within **10 days**.
4. Save the policy configuration.
5. Create an Oracle Sales opportunity for the Services business unit with a status of Won and a win probability of 70% or higher.

Expected result: Project Planning Workspace makes project creation available for review. If the action is due within 10 days, it is assigned High priority according to the configured priority window. If the opportunity win probability is below 70%, the workspace does not make the project-creation action available.

Create a Detailed Budget with a Reserve

1. Configure a reserve percentage of 10%.
2. Set reserve placement to the project level.
3. Select the configured reserve resource.

4. Select the **Reference Project Method** detailing method.
5. Configure the reference-project matching and ranking rules.
6. Save the policy configuration.
7. Open a project with an approved strategic budget.
8. Review the reference project selected by the workspace, the prepared allocations, reserve, revenue target, and margin.
9. Review any phase, task, resource, margin, or reserve exceptions, and resolve them when required by the configured policy.
10. Recalculate the allocation and confirm it before applying the permitted writeback action.

Expected result: The workspace calculates the reserve before distributing the remaining approved budget and prepares a policy-guided allocation for review. When an exception exists, the workspace displays the configured warning or revision requirement before the writeback action can proceed.

Create a Project and Associated Contract Information

1. Create or update the applicable Default configuration or business-unit-specific configuration for project creation.
2. Set the default budget creation preference to **Generate by default**.
3. Set the default contract creation preference to **Yes**.
4. Set the contract creation method to **Create a new contract**.
5. Select the approved contract creation source.
6. Set the contract amount association level to **Task level**.
7. Set the task-level distribution method to **Selected top-level tasks**.
8. Save the policy configuration.
9. Create a project from an eligible opportunity or supporting document.
10. Review the project draft, including template defaults, validated source information, budget treatment, and contract treatment.
11. Confirm the project draft.

Expected result: Project Planning Workspace derives the applicable business unit from the user context and applies the matching business-unit-specific configuration or Default configuration. The workspace creates the project only after the user confirms the draft.

Staff Approved Labor Demand

1. Configure a qualification threshold of 80%.
2. Save the policy configuration.
3. Open approved, time-phased labor demand planned by role or job, with a qualified person who has available capacity.
4. Review the candidate evidence and confirm the staffing result when required.
5. Confirm that the workspace creates named-person demand and reduces the corresponding role or job demand.
6. Open another labor-demand scenario with no suitable person available.

Expected result: The workspace identifies a person who meets the 80% qualification threshold and has available capacity. When staffing is completed, the workspace creates named-person demand and reduces the corresponding role or job demand. When no suitable person is available, the workspace opens an email communication with the resource-request details.

5 Validation and Testing

Configure Pilot Users

Assign each pilot user the workspace duty and only the capability-specific roles, privileges, and data access needed for the scenario. Enable the required permission groups.

Test Business Scenarios

Test the following scenarios.

- **Opportunity cost estimation and proposal generation:** Test an opportunity inside and outside the configured response window. Test scenarios where revenue is present or absent and where the margin meets or doesn't meet the target. Test a permitted Ask Oracle adjustment. Verify that the reviewed estimate can generate a project proposal.
- **Project creation:** Create a project from an opportunity and from a supporting document. Verify extracted project plan information, template selection when multiple templates are eligible, and that explicit validated input takes precedence over conflicting template defaults. Confirm that no project is created until the user confirms the draft.
- **Detailed budget planning:** Test an eligible reference project and a scenario with no eligible reference project. Test Ask Oracle refinement and verify that updates are available for review before users apply or save them. Test a strategic-budget allocation that requires correction, recalculation, preview, and user confirmation before writeback.
- **Labor resource requests and staffing:** Test a policy-compliant match, a candidate whose qualification score is below the configured threshold, missing or stale matching evidence, and a scenario with no suitable person available. Verify that the workspace doesn't treat the below-threshold candidate as a policy-compliant match. Verify that resource-request details are available for review and communication when no suitable person is available and the configured policy conditions are met. Confirm that named-person demand and the corresponding role or job-demand reduction are reflected in the plan before staffing is complete. Verify that the pilot user is assigned as the **Owner** of the applicable resource pool. A user assigned only as a **Pool Manager** can't fulfill resource requests.
- **Planning priorities:** Test each applicable business-unit configuration. Vary opportunity status, win probability, due date, action age, and the number of eligible actions. Verify the assigned priority, displayed-action limit, and expiry behavior.

Confirm Readiness

Confirm that users review generated cost estimates, proposal information, project plans, and budget recommendations before they apply, save, approve, or confirm an action. Confirm that access prevents unsupported actions and that configured policies guide the displayed recommendations.

6 Using Project Planning Workspace

Review and Act on Workspace Priorities

Use Project Planning Workspace to review and act on planning work that requires your attention. Review generated information and policy-guided recommendations before you apply, save, approve, confirm or create a record.

1. Open **ERP Agents**, then select **Project Planning Workspace**.
2. Review **Priority Actions** and **Planning Priorities** to identify work that requires attention.
3. Select an action to review its planning information, recommendation, policy status, and required next action.
4. Review information that the workspace has completed or identified for your awareness.
5. Review and, where supported, update recommendations that the workspace generated for your consideration.
6. Use Ask Oracle to initiate a supported action or request a permitted refinement.
7. Confirm, approve, apply, or save the result only after it meets your organization's policy requirements.

Expected result: You review prioritized planning work and complete the action appropriate to your role and access.

Start an Ask Oracle Interaction

Use Ask Oracle to initiate supported planning actions and request permitted natural-language refinements.

- Attach a supporting document to initiate project creation from document information.
- Request a permitted refinement to a supported cost estimate, project plan, or generated budget allocation.
- Review the resulting recommendation and its policy status before you confirm, apply, or save it.
- Use the workspace staffing flow to review labor matches and resource requests; Ask Oracle does not fulfill resource requests or create resource assignments.

Use Cases

Use the following scenarios to understand how project managers use Project Planning Workspace for common planning activities. Each use case identifies the trigger, the workspace-supported activity, the required human review, and the outcome.

Estimate Opportunity Cost and Generate a Proposal

Persona: Estimator or project manager

Trigger: A qualified sales opportunity is within the configured response window and requires an estimate and proposal.

Interaction: The Project Planning Workspace applies the configured estimation-policy or reference-project method and presents the cost, effort, revenue, and margin information. Review the estimate and use Ask Oracle to request a permitted cost or revenue refinement.

Expected result: The workspace presents a reviewable cost, effort, revenue, and margin position before proposal generation or any required project creation.

Human review: Review the opportunity scope, estimate, margin, reference-project information when applicable, and resulting proposal before generating the proposal.

Exception path: If the opportunity does not meet the configured eligibility criteria, or if required estimation information is unavailable, review the missing information or applicable policy configuration before proceeding.

Create a Project from an Opportunity or Supporting Document

Persona: Project manager

Trigger: An opportunity or supporting document is ready for project creation.

Interaction: The Project Planning Workspace evaluates the applicable business-unit configuration, selects an eligible template, and prepares a project draft from the opportunity or document information.

Expected result: The workspace prepares a project draft using the matching business-unit configuration or the approved default configuration.

Human review: Review and, where needed, revise the project name, project number, project start date, project finish date, business unit, template, task names, task numbers, task dates, task descriptions, milestones, schedule, resources, and contract information. Confirm the draft before the project is created.

Exception path: Provide the required project information or select an eligible template when information is missing. Complete any required approval before the project is created.

Create a Detailed Budget

Persona: Project manager

Trigger: An approved strategic budget is available for project detailing.

Interaction: The Project Planning Workspace prepares task-and-resource allocations and applies the configured reserve, revenue, margin, and policy checks. Review the allocation and use Ask Oracle to request a permitted refinement when needed.

Expected result: The workspace preserves the approved budget, allocates the remaining amount across tasks and resources, and reserves the configured percentage of the budget according to policy.

Human review: Review the phase, task, resource, reserve, revenue, margin, and policy-exception information. Recalculate the financial position after a correction, then confirm the save, baseline, or approval action.

Exception path: When a policy check identifies an exception, review the exception and revise the allocation when required. Save the resulting changes after completing the required review.

Request and Staff Labor Resources

Persona: Project manager

Trigger: Approved, time-phased labor demand planned by role or job is ready for matching.

Interaction: The Project Planning Workspace evaluates available candidates against role qualifications, project-specific skills, location, capacity, and policy requirements. When a candidate meets the configured policy conditions, the workspace automatically assigns the qualified person to the approved labor demand.

Expected result: The workspace creates named-person demand and reduces the corresponding role or job demand.

Human review: Review and accept exceptions, such as a candidate who doesn't meet the configured policy conditions. Review and send the resource-request communication when no suitable person is available.

Confirm the resulting named-person demand and corresponding role or job-demand reduction before considering staffing complete.

Exception path: When no suitable person is available, the workspace opens an email communication with the resource-request details. Recruiting, hiring, and worker-assignment activities occur outside the workspace flow.

Review Planning Priorities and Actions

Persona: Project manager

Trigger: An opportunity, proposal, detailed-budget, or staffing action meets the configured status, threshold, or due-date rule.

Interaction: Review the action, its priority, and the planning work it requires.

Expected result: The landing page displays the action within the configured priority windows, action-display limit, and expiry period.

Human review: Complete, defer, or act on the planning work in the displayed action.

Exception path: Use a separate business-unit configuration when planning rules differ. Review the configuration when planning timelines, resource lead times, or review thresholds change.

7 Troubleshooting Project Planning Workspace

Resolve Common Issues

Use this information to resolve common issues with Project Planning Workspace.

Issue	What to Check
You can't access Project Planning Workspace.	Verify that you have the Project Planning Workspace Duty, enabled permission groups, and the privileges and data access required for the capability that you intend to use. For more information, see *Assign Required Roles and Access*.
You can't apply, save, approve, or confirm an action.	Review the policy-driven requirements, required approvals, and your access. Confirm that the action is permitted for the applicable business unit and planning target.
You can't create a project.	Verify that the required project attributes and eligible project templates are available. Project managers must have the functional privileges, inquiry duties, and project data access required to create a project, including Manage Project REST Service (PJF_MANAGE_PROJECTS_REST_PRIV). For more information, see *Assign Required Roles and Access* and *Configure Project Creation*.
You can't create a cost estimate or proposal.	Confirm that the sales opportunity is qualified and within the configured response window. Verify that the selected estimation method and required estimation information are available. If using the Reference project method, confirm that the required reference-project information is available.
You can't generate a detailed budget.	Verify that the approved budget and applicable policy conditions are available. If the selected detailing method requires a reference project, confirm that an eligible reference project is available.
You can't staff a labor demand.	Verify named-person planning support, matching evidence, candidate capacity, and required acceptance or approval. If the matching scenario uses time-phased demand, confirm that the demand is time phased. If matching uses qualifications, proficiency, resume text, or keywords, verify that the project resource search index job completed successfully.
No suitable person is available for staffing.	Review the candidate evidence and matching conditions. When no suitable person is available, review and send the email communication that contains the resource-request details.
The staffing action appears complete, but the plan is not updated.	Do not treat a created project labor resource as completed staffing. Confirm that the named-person demand and the corresponding role or job reduction are read back to the plan.

Issue	What to Check
An Ask Oracle request does not return the expected result.	Confirm that the request is limited to supported project-initiation or planning-refinement activities, such as initiating project creation from a supporting document or refining a cost estimate, project draft, or budget allocation. Use the workspace staffing flow for labor matches and resource requests.
You don't see an expected Planning Priority or Action.	Review the applicable business-unit configuration, including the status, threshold, due-date, priority-window, action-display-limit, and expiry rules.

8 Project Planning Workspace FAQs

Can I modify the default policy values?

Yes. You can configure policy values to align with your organization's requirements. For example, you can configure opportunity thresholds, margin percentages, qualification thresholds, and reserve or contingency percentages.

Any demonstration values provided are examples only and aren't recommended as production policy values.

Can users create a project from a document?

Yes. Users can create a project directly in Ask Oracle by attaching a supporting document, such as a statement of work or request for proposal.

Does project creation require confirmation?

Yes. Review and confirm or revise the project draft before the workspace creates the project.

Does Project Planning Workspace automatically apply a refined budget?

No. Project Planning Workspace presents the updated recommendation for review before you apply or save it.

Does the workspace complete recruiting, hiring, or worker assignment?

No. When suitable labor is unavailable, the workspace can support a resource request. Recruiting, hiring, and worker-assignment activities occur outside the workspace flow.

What happens when suitable labor is unavailable?

The workspace opens an email communication with the resource-request details. Use the communication to initiate the approved resource-request process.

Why is the Project Planning Workspace landing page empty after I configure security?

An empty landing page can be expected when no project, opportunity, or budget data meets the configured policy conditions. Security configuration allows users to access the workspace, but it doesn't create Planning Priorities, actions, or insights.

Verify that qualifying data is available for the capability that you want to use:

Capability	Required data setup
Proposal and project initiation	An Oracle Sales opportunity must meet the configured policy conditions for proposal generation or project initiation.
Detailed budget planning	A budget version must exist with assignments only at the project node level.
Labor resource requests and staffing	The project must use project roles for planning, and the project resource breakdown structure must use the named resources format.

Also verify that the qualifying record is within the configured display window. Insights, Planning Priorities, and actions are displayed only for the period defined in the applicable policy. Records outside that period might not appear even when users have the required access.

If the landing page remains empty, verify the applicable business-unit configuration, the policy conditions, the data setup, and the display-window settings.