Oracle Fusion Cloud Project Management

Project Planning Agent Assistants

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1 About this Guide

What's Included in the Project Planning Agent Assistants Guide

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

- *Project Change Order Initiation Assistant*
- *Project Change Order Summary Generation Assistant*
- *Project Proposal Generation Assistant*

2 Project Change Order Initiation Assistant

About Project Change Order Initiation Assistant

As a project manager, you can use the Project Change Order Initiation Assistant to generate a change order from an existing issue. The assistant uses the information captured in the issue and generates a draft change order that you can review and refine before saving.

What this assistant supports

You can use this assistant to:

- Initiate a change order from an existing project issue.
- Generate a draft change order from the issue details.
- Regenerate the draft when you update the issue details.
- Create a change order that includes budget and forecast impact, and detailed impacts when a baseline budget version exists.

What this assistant doesn't support

This assistant doesn't replace user review. You still review and edit the generated change order before saving it.

It also doesn’t perform approval actions on your behalf. It helps create the draft change order, but you still review, save, and approve it through the normal application flow.

Set Up and Access the Project Change Order Initiation Assistant

The following set ups must be completed before the assistant can be used:

- The feature must be enabled through the Opt In UI.
- Users must have the Manage Project Work Plan Data (PJT_MANAGE_WORK_PLAN_DATA) privilege to generate a change order from a project issue.
- Users must have the Manage Project Changes privilege to perform change-order impact assessment, review, and approval for budget adjustments.

Note: For more information about the steps to enable and configure, see *What's New*.

Generate a Change Order from a Project Issue

Open the project issue that contains the details you want to use for the change order. Make sure the issue includes enough information to support a clear draft. Providing more detail in the initiation dialog improves the generated result.

Follow these steps:

1. Navigate to the Project Management work area and open the issue in the Manage Issues page.
2. Click **Initiate Change Order**.
3. In the Initiate Change Order dialog box, click **Generate** to view the draft change order that's generated from the issue details.
4. Review the generated change order.
5. Provide additional details as needed and click **Regenerate** until the draft is ready.
6. Click **Create and Review**, then review the created change order on the Edit Change Order page.
7. Make minor changes, if needed.
8. Click the Impact Assessment tab to review the change impacts.
9. Click **Save** or **Save and Close** to save the change order.

The generated change order includes budget and forecast impact, and it includes detailed impacts if a baseline budget version exists.

Note: Each time you click **Regenerate**, the assistant creates a revised version of the entire draft change order. It doesn't update only selected sections.

Use Case: Generate a Draft from a Well-Documented Issue

Story : Davis is reviewing an issue created by the project team. The issue summary and description are already clear, and Davis wants to move quickly from issue tracking to formal change management.

Example:

- **Davis**: Opens the issue and clicks Initiate Change Order.
- **Assistant** : Generates a draft change order using the issue details.
- **Davis** : Reviews the proposed name, description, reason, justification, and impact details. Davis can regenerate the draft or continue to Create and Review the change order.

What This Example Shows: When the issue already contains enough information, the assistant can generate a useful draft without requiring additional input.

FAQs for the Project Change Order Initiation Assistant

Why can’t I see the Initiate Change Order option?

Confirm that you are using the supported role, have the required access, and that the feature is enabled in your environment.

Do I have to enter additional details?

No. Additional details are optional, but they often improve the generated draft.

How much issue information should I provide?

The quality of the generated draft depends on the information available in the issue. More complete issue summaries, descriptions, and supporting details generally produce better results.

Can I edit the generated change order before saving it?

Yes. The assistant generates and populates the draft, but you can still edit it before saving.

What happens if I click Regenerate?

The assistant creates a new draft. It doesn't revise only a single part of the prior result.

Can I cancel without creating anything?

Yes. Canceling from the initiation dialog closes the flow without creating a change order.

What does the generated change order include?

It includes budget and forecast impact, and it includes detailed impacts when a baseline budget version exists.

3 Project Change Order Summary Generation Assistant

About Project Change Order Summary Generation Assistant

As a project manager, use the Project Change Order Summary Generation Assistant to create a summary for a project change order. The summary highlights project financial impact, helps reviewers and approvers understand the change faster, and appears in approval notifications to support faster review and approval.

What this assistant supports

You can use this assistant to:

- Generate a summary for a project change order.
- Regenerate the summary when you update the change order details.
- Use the summary in approval notifications.

What this assistant doesn't support

This assistant doesn't generate a summary before the change order is saved, and it doesn't replace the normal change order workflow for impact assessment, review, approval, and implementation.

Set Up and Access the Project Change Order Summary Generation Assistant

The following set ups must be completed before the assistant can be used:

- The feature must be enabled through the Opt In UI.
- Users must have the Manage Project Changes (PJE_MANAGE_PROJECT_CHANGE_PRIV) privilege and the ORA_PJE_PROJECT_CHANGE_SUMMARY_GENERATION_ASSISTANT_DUTY duty role to generate and refine a project change order summary.

Note: For more information about the steps to enable and configure, see *What's New*.

Generate and Refine a Project Change Order Summary

Open the change order to generate a summary that describes the business impact for stakeholders and approvers. Review the summary, and regenerate it after you update the change order details.

Note: The **Generate** action is available only after you save the change order.

Follow these steps:

1. In the Project Management work area, open the Task panel tab and click **Manage Change Orders**.
2. Click **Create** to create a change order for the project you're viewing.
3. Enter the change order details as needed, and save the change order.

   A **Generate** button appears.
4. Click **Generate**.
5. Review the generated summary.
6. Update the change order details if needed.
7. Click **Regenerate** until the summary reflects the change order the way you want it.
8. Save the change order again.

Note: The summary appears on the change order details page and in approval notifications. If the summary doesn't reflect your latest changes, update the change order details first and then regenerate the summary. The summary can also be used by approvers and reviewers from notifications, so keep it aligned with the final change order content.

Use Case: Generate a Change Order Summary

Story : Jones has completed the impact assessment for a change order that affects task dates and project budget.

Example:

- **Jones** : Saves the change order and clicks **Generate**.
- **Assistant**: Creates the summary.
- **Jones**: Reviews the summary, makes any needed edits to the change order, saves the change order, and then clicks **Regenerate**.
- **Assistant**: Regenerates the summary.

What This Example Shows: The summary is created after the change order is saved, and you can regenerate it after you refine the change order details.

Use Case: Create a Change Order Summary for Approval

Story : Davis requests additional battery storage capacity for a solar power plant project. The project manager has already completed the impact assessment and wants a concise summary for approval.

Example:

- **Project manager** : Saves the change order and clicks **Generate**.
- **Assistant**: Creates the summary and highlights the financial impact of the change order.
- **Project manager**: Reviews the summary, makes any needed edits to the change order, saves the change order, and then clicks **Regenerate**.
- **Assistant**: Regenerates the summary so it's ready for approval.

What This Example Shows: The assistant helps the project manager turn assessed change details into a reviewable summary that's ready for approval.

FAQs for the Project Change Order Summary Generation Assistant

Why does the Generate button not appear?

Save the change order first. The Generate button appears after you save the new change order. Also confirm that the feature is opted in and that you have the Manage Project Changes privilege.

Can approvers and reviewers see the summary without opening the change order?

Yes. The summary appears in approval notifications, so approvers and reviewers can review it directly from the notification.

What should I do after changing the change order details?

Save the updated change order and select **Regenerate** so the summary reflects the latest details.

Can I edit the generated summary manually?

Yes. You can review and edit the generated summary before proceeding with the change-order approval process.

4 Project Proposal Generation Assistant

About the Project Proposal Generation Assistant

This topic provides an overview of the Project Proposal Generation Assistant and explains how it helps project managers generate a comprehensive project proposal with company background, executive summary, implementation plan, timeline, and resource plan.

What this assistant supports

It supports creating a proposal from project-related entry points, reviewing the generated content, editing the text, regenerating individual sections, and publishing the final proposal.

What this assistant does not support

It does not replace the project manager's review. Users still need to confirm the proposal content before publishing, and published proposals cannot be changed.

Enable Access to the Project Proposal Generation Assistant

This topic provides the setup and security guidance needed to use the feature, including opt-in, permission groups, and required privileges.

Before You Start

Make sure the **Project Proposal Generation** feature is opted in for Project Financial Management and that the users who will use it have the required permission groups and privileges.

Steps to Enable Access to the Project Proposal Generation Assistant

1. Open **Setup and Maintenance** and enable the **Project Proposal Generation** feature opt-in for Project Financial Management.
2. In Security Console, enable the required permission groups for each role that will use the feature.
3. Grant the following required privileges:
   - Manage Project Proposal (PJF_MANAGE_PROJECT_PROPOSAL_PRIV)
   - Manage Project Proposal Data (PJF_MANAGE_PROJECT_PROPOSAL_DATA)
   - Project Proposal Generation Assistant (ORA_PJF_PROJECT_PROPOSAL_GENERATION_ASSISTANT_DUTY)

Note: For custom roles, add the appropriate feature-specific AI assistance duty role and then enable permission groups for those roles. For more information, see *Creating Custom Roles to Enable Access to Project Financial Control Agents*

Generate and Manage a Project Proposal

This topic provides the end-to-end task flow for creating a proposal, reviewing the generated sections, editing the content, regenerating sections when project details change, saving the proposal, and publishing it.

Before you start

Ensure the project has a high-level plan, a budget, and a clear description.

Steps to Generate and Manage a Project Proposal

1. In the Project Management work area, open the project and start proposal creation from the **Actions** panel.
2. In the Manage Project Proposals page, click **Create**.
3. Review the project information on the General Info page.
4. Continue to the Proposal page and review the generated proposal. Edit the content and regenerate individual sections separately, if needed. When you regenerate the contents of a section, the assistant uses the current project details, including any recent updates.

Section	Description
Company Background	Displays the company background, company's expertise, industry presence, and key capabilities.
Executive Summary	Displays the project purpose, objectives, goals, expected outcomes, and how the project aligns with stakeholder expectations.
Implementation Plan and Project Timeline	Displays the approach for execution, including major milestones, timelines, and estimated budget.
Resource Plan and Budget Allocation	Displays the resource requirements, including project roles and financial allocations.

5. Edit the content as needed.
6. Regenerate individual sections if project details have changed.
7. Click **Save**.
8. Publish the proposal when it is ready to share.

Note: After you publish a proposal, you cannot make changes to it. When you regenerate, the assistant uses the current project details, including recent updates.

FAQs for the Project Proposal Generation Assistant

Why can't I see the Project Proposal Generation Assistant?

The most likely cause is missing setup or security access. Check that the feature is opted in, permission groups are enabled, and the role has the required privileges and duty role.

What happens when I regenerate a section?

The regenerated section uses the latest project details, including any recent updates.