Oracle Project Portfolio Management Cloud

Release 13 (updates 18A – 18B)

New Feature Summary

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DOCUMENT HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates appear in the following table:

Date	Update Version	Notes
23 APR 2018	Update 18B	Revised update 18B.
12 JAN 2018	Update 18A	Delivered new features in update 18A.

UPDATE 18B

REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates appear in the following table:

Date	Feature	Notes
23 APR 2018	Review Project Period Close Exceptions in an Analysis	Updated document. Revised feature name and description.
23 APR 2018	Enhanced Exception Handling for Projects Import Using File-Based Data Import	Updated document. Revised feature description.
06 APR 2018		Created initial document.

OVERVIEW

This guide outlines the information you need to know about new or improved functionality in this update.

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PROJECT FOUNDATION

LEVERAGE NEW PROJECT CONTEXTUAL ACTION

Use the project contextual actions throughout Oracle PPM Cloud. Project contextual actions enable you to view information and navigate and perform project-related actions while in the context of your current work.

QUICKLY ACCESS ANOTHER PROJECT FROM ANYWHERE IN PROJECT FINANCIAL MANAGEMENT WORK AREA

Access a project from anywhere within the Project Financial Management work area by simply searching by project name. When you select a project, you will navigate to the Project Overview page in the context of that project.

REVIEW PROJECT PERIOD CLOSE EXCEPTIONS IN AN ANALYSIS

Project accountants can review project period close exceptions using the Projects - Period Close Exceptions subject area in Oracle Transactional Business Intelligence. They can create their own analysis and view pending transactions by using dimensions such as project, task, expenditure type, project organization, and type of message.

ALLOW NEGATIVE BURDEN MULTIPLIERS

Apply negative burden multipliers to calculate the burdened cost, revenue, or bill amount of expenditure items that are only partially reimbursable.

USE THE PROJECT CUSTOMER DIMENSION WITH THE PROJECTS - CROSS SUBJECT AREA ANALYSIS - REAL TIME SUBJECT AREA

Added dimensions for Project Customer added to the Projects – Cross Subject Area Analysis – Real Time for enhanced ability to create analysis based on the project customers associated with projects.

Previously this subject area included all the key financial measures for forecast, cost, budget, revenue but lacked effective ways to create analysis to show this information based on Project Customers. As a result, it was not possible to show these measured by customer.

With the addition of these new Project Customer dimensions, it is now possible to more effectively report on project financials by the Customer associated to the project on the Parties tab found by selecting Manage Financial Project Plan from the Tasks menu on the Project Overview.

ALLOW PERCENTAGE FIELD IN PROJECT CLASSIFICATION CODES TO CONTAIN DECIMALS

Users can now assign project classifications and codes to a project using percentages in decimals (Example: 20.5% Internal 79.5% Federal).

SAVE TIME SEARCHING FOR PROJECTS DUE TO RETAINED SEARCH RESULTS

Allows user to search for a set of projects using a search criteria, and then retain the search in order to work efficiently on them without querying for them again.

ENHANCED EXCEPTION HANDLING FOR PROJECTS IMPORT USING FILE-BASED DATA IMPORT

File-Based Data Import lets users load data into Oracle Cloud Applications from external sources such as legacy systems or third-party applications. In the current reporting framework, users upload data from an Excel template and the success or error report data is shown in the form of a PDF report. The new framework additionally provides end users with a downloadable Excel file containing the error report. The users can use the Excel file to correct the errors and upload the data into the application.

PROJECT CONTROL

REFRESH CURRENCY CONVERSION RATES

Retrieve the latest currency conversion rates defined in the application during financial project planning, budgeting, and forecasting. For example, you plan for the next five years with the current currency conversion rates. Later, you can choose to refresh the rates to update your plan based on the latest available information.

ASSIGN RESOURCE AT LINE LEVEL OR PERIODIC LEVEL USING FILE-BASED DATA IMPORT

You can choose whether to enter data for resource assignments at line level or periodic level for budget lines or forecast lines using file-based data import.

DEFER BUDGET GENERATION WHEN SETTING A FINANCIAL PROJECT PLAN BASELINE

Set the financial project plan baseline and continue with other activities such as capturing progress without waiting for the generation of a budget version to be completed. The application will either immediately generate the budget version or defer the generation using background processing based on the size of the project.

DERIVE AMOUNTS AUTOMATICALLY USING FILE-BASED DATA IMPORT

Calculate amounts for rate based resources while creating budget or forecast lines using file-based data import. When specifying only quantity, the import process will determine the rate and calculate the amounts for the line based on the rate settings of the respective financial plan type.

CREATE AND ASSIGN RESOURCES TO A PROJECT FORECAST USING A SOAP SERVICE

Create and assign new resources to a project forecast when you create forecasts using the Project Forecast SOAP service.

AUTOMATICALLY ADD RESOURCES TO PLANNING RESOURCE BREAKDOWN STRUCTURES

Add resources to the planning resource breakdown structure of a project after you complete planning and scheduling and choose the action to update the financial plan. If a project uses a project-specific planning resource breakdown structure, then the update process automatically adds any missing resources for named-person and expenditure type resource formats.

MAINTAIN WORKFLOW AND MULTICURRENCY SETTINGS ON FINANCIAL PLAN TYPES

Project application administrators can easily maintain the existing financial plan types by allowing modifications to the workflow status change attribute. They can also enable a financial plan type for multicurrency after creating a financial plan type version.

PROJECT COSTING

VIEW BILL RATE OVERRIDES FOR MANAGING PROJECT COSTS

You can view the bill rate override values for an expenditure item in the Manage Project Costs page. These values are also available for reporting within the Project Costing – Actual Costs Real Time and the Project Costing – Expenditure Item Performance - Real Time subject areas. The values that are now displayed are Override Source Application, Source Reference Identifier, Override Bill Rate, and Override Bill Rate Currency.

REVIEW AND APPROVE PROJECT COST ADJUSTMENTS

Review the adjustments performed on your project costs and then approve or reject the adjustments based on your business rules. You can use the newly added project cost attributes such as expenditure type, project type, expenditure organization, funding source, and so on to configure your business rules appropriately in the approval workflow.

CREATE EXTERNAL PROJECT COMMITMENT TRANSACTIONS INCREMENTALLY USING A SOAP SERVICE

Use the Project Unprocessed Commitment Transaction SOAP service to create external project commitment transactions incrementally. You don't have to purge existing external commitment transactions for a transaction source or project to create new external commitment transactions for the project. This feature enables you to create only the new external commitment transactions without having to manually track and maintain existing external commitment transactions outside the application.

PROJECT BILLING

DRILL DOWN TO A PROJECT CONTRACT INVOICE AND BILLING EVENT DETAIL FROM REAL-TIME ANALYSIS

You can now navigate from an Oracle Transactional Business Intelligence (OTBI) report containing project contract billing information to view a specific invoice or billing event in the application.

INVOICE INTERNAL CONTRACTS WITH OPEN RECEIVABLES OR POST TO GL INDICATORS UNCHECKED

You can choose to set the Open Receivables or Post to GL indicators on the Accounts Receivable Transaction Type setup to Yes or No for Intercompany and Interproject contracts. Currently you must set the Open Receivables and Post to GL indicators to Yes for Oracle Receivables Cloud to process the invoices.

CONTRACT AMENDMENT WITHOUT VERSIONING

You can now decide if you want a new version created each time you amend a contract. Versioning provides a historical record of the changes made to a contract and allows you to abandon the changes made and revert to the previous version. Versioning also allows you to generate invoices and recognize revenue from a previously active version without reactivating the current version. Not versioning a contract may contribute to better performance as there is less historical data to retrieve and process, but prevents invoicing and revenue recognition for the contract while it is under amendment.

EXPANDED CROSS-SUBJECT AREA REPORTING BETWEEN PROJECT BILLING AND RECEIVABLES

Create more robust cross-subject area reports between project billing and receivables subject areas leveraging new common dimensions for enhanced ability to bring data from both areas together in a single analysis.

The Project Contract Header folder and related dimensions are added to the Receivables - Transaction Real Time subject area and the Transaction Date and Transaction Number are added to the Project Billing - Invoices Real Time subject area.

ALLOW INVOICE PROCESSING IN ANY SEQUENCE

You can choose to allow project contract invoices to be processed through their normal life cycle in any order. You no longer need to submit, approve, or release invoices in ascending invoice number sequence.

PERFORMANCE OBLIGATION ACCRUAL

You can now record the initial performance event that accrues the contract asset and contract liability for a performance obligation, under the new IFRS 15 and Accounting Standards Codification 606 revenue guidelines.

IDENTIFY A CONTRACT FOR MIGRATION OF INVOICE AND REVENUE DETAILS

You can identify a contract in Oracle Sales Cloud to migrate invoicing and revenue details from an external system to Oracle PPM Cloud. The identified contract generates revenue and invoice only for events marked for migration. Invoicing and revenue recognition for new transactions is processed only if the Migration in progress indicator is turned off.

PROJECT OPTIONALLY REQUIRED ON BILLING EVENT

You can choose to require each active contract line to have at least one associated project and every billing event to have a project specified. You can use the new Manage Administrator Profile option to enforce projects on all events and then use the information to define subledger accounting based on the project selected on the event.

PROJECT PERFORMANCE REPORTING

VIEW PROJECT PERFORMANCE REPORTING DATA IN REAL-TIME ANALYSES

View project performance reporting data by creating analyses and dashboards using the Projects - Performance Reporting Real Time subject area in Oracle Transactional Business Intelligence. You can create real-time analyses to view metrics, such as ITD actual cost, ITD revenue, and EAC budget cost for projects in both project and ledger currencies. You can also view summarized data for the task hierarchy, resource hierarchy, and specific tasks and resources for a project or group of projects.

GRANTS MANAGEMENT

DRILL DOWN TO AWARD OVERVIEW FROM REAL-TIME ANALYSIS

You can now drill down from an Oracle Transactional Business Intelligence analysis to the Award Overview page.

ALLOW FOR PROJECTS NOT ENABLED FOR BUDGETARY CONTROL TO BE CREATED IN QUICK CREATE AWARD

Grants administrators and principal investigators can create and associate projects that are not enabled for Budgetary Control on the Create Award page.

ENHANCED USER INTERFACE FOR GRANTS MANAGEMENT

Grants Administrators and Principal Investigators can define their own landing page. By using this enhanced user interface and the specific search function, they can quickly and more efficiently access information and complete daily activities. Additionally, they can get an overview of the most recent awards or initiate actions from a single window.

PROJECT MANAGEMENT

USE FACET FILTERS TO EFFICIENTLY MANAGE PROJECT RESOURCES

Use the facet filter on the Manage Project Resources page to filter and search on a variety of resource-related fields. As the project manager, use keyword search to locate resources by name, status, and role to display specific resources in the search results when sorting through larger quantities of resources on projects.

AS-OF-DATE SCHEDULING

Schedule projects as of a specific date in the past or future. For example, project managers can schedule legacy projects as of a past date, or pipeline projects that are yet to start on a future date.

CREATE AND READ CHANGE ORDERS USING A REST SERVICE

Create and read project change orders using a Representational State Transfer (REST) Service. This service enables you to transfer or read change orders from external applications.

PROJECT RESOURCE MANAGEMENT

PROPOSE MULTIPLE RESOURCES FOR PROJECT RESOURCE REQUEST

Resource managers can propose multiple resources for a project resource request. Project managers can review the proposed resources and select and approve the resource that best fits the project. In the case of a request for multiple resources, project managers can select and approve up to the number of resources requested.

SECURE RESOURCE SUPPLY

Define security so that resource managers can only view and select resources from a limited set of resource pools. They can't see or assign resources from other resources pools. This approach secures resources across the organization and increases their efficiency in searching and staffing resources they are authorized to staff.

TASK MANAGEMENT

TRACK WORK ITEMS IN VIEW-ONLY PROJECT PLAN

Exposes information on the work items related to a task in the View-Only Project Plan. Viewers of the project plan can track work items that drive the completion of the task without having to navigate to the Task Details page for each task, and can also use the work items to navigate to the associated objects.

MOBILE PROJECT-BASED TIME CAPTURE EASE OF ENTRY AND NAVIGATION

Project team members want to be able to quickly navigate and easily enter their actual time worked. Team members can add time entries for a selected day and those same time entries will automatically be included for the remaining days within the time period. The start day of the mobile time card user's standard work week will be determined by the start day of the time period in the web application.

UPDATE 18A

REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates appear in the following table:

Date	Feature	Notes
12 JAN 2018		Created initial document.

OVERVIEW

This guide outlines the information you need to know about new or improved functionality in Oracle Project Portfolio Management Release 18A.

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PROJECT FOUNDATION

Project Foundation includes common components that are shared across products within Oracle Project Portfolio Management Cloud. It includes the basic project plan structure and components such as resource breakdown structures, rate schedules, pricing, burdening, and cross-charge processing, as well as delivered integration to Microsoft Project.

SIMPLIFIED MICROSOFT PROJECT INTEGRATION FOR PROJECT FINANCIAL MANAGEMENT

Allow users with the Project Administrator role to download and use Microsoft Project client from the Project Financial Management work area.

USE FACET FILTERS TO SEARCH FOR YOUR PROJECTS

Use the facet filters and keyword search capabilities to quickly find the projects that you want to view. You can filter for projects by their status and other key attributes. You can also search by project number or name.

ENHANCED EXCEPTION HANDLING FOR PROJECT RATE SCHEDULE IMPORT

Use the new Excel based error report generated for the Import Project Rate Schedules process to review the reported errors, correct them and resubmit the file for import processing. In case of no errors, the output section of the scheduled process will only show the PDF report; otherwise the output section will have both the Excel and PDF reports.

PROJECT COSTING

Oracle Project Costing Cloud captures commitments and costs from across Oracle Cloud applications and supports third-party integrations. The unique cost collection and processing needs of different sources are streamlined to provide timely insight into validated project costs.

PROJECT AND TASK SEARCH ENHANCEMENTS IN ORACLE TIME AND LABOR CLOUD

Efficiently search for project-related time cards in Oracle Time and Labor Cloud based on project number and task number. Quickly retrieve the list of time cards that have entries for a particular project or task.

ADD TIME ENTRIES FROM FAVORITE TIME CARDS IN ORACLE TIME AND LABOR CLOUD

Identify your favorite time cards and later select from a list of favorite time cards to quickly add entries to a time card. You have an option to either replace existing time card entries or add to any existing time card entries. You can then update the hours per day, modify or remove entries, or add additional entries as needed. The entries can be project or non-project related, depending on the time card format. The favorite can represent recurring project work, a training week, or any other repeating pattern that you want to reuse in the future to accelerate time entry.

ASSIGNMENT OF ASSETS TO MULTIPLE TASKS WITHIN APPLICATION DEVELOPMENT FRAMEWORK DESKTOP INTEGRATION

You can now assign an asset to multiple tasks using the Create and Assign Assets Application Development Framework Desktop Integration (ADFdi) spreadsheet.

SUPPORT PROVIDER AND RECEIVER FISCAL CALENDAR AS VALID DIMENSIONS TO COMMITMENT FACT

You can now report on Project Commitments using the Fiscal and Receiver Fiscal Calendars using the Project Costing - Commitments Real Time subject area.

PROJECT MANAGEMENT

Project Management extends project planning, management, and scheduling capabilities to all individuals within the enterprise who are required to manage project-based work. Project managers can engage with team members to develop tasks, resolve issues, report progress, and monitor the status of the project to ensure that objectives are realized.

APPLICATION COMPOSER FOR PROJECT EXECUTION MANAGEMENT

Include business-specific attributes on project resource requests, deliverables, issues, and backlog items using Application Composer. You can quickly and easily add attributes in addition to meet your specific business needs.

PROJECT RESOURCE MANAGEMENT

Organizations can optimize the allocation and utilization of their most precious resource: their people. Innovative and intuitive tools let resource managers and project managers ensure that the best-fit resource is identified and placed on each and every project assignment, to the benefit of the organization, the project resource, and the end customer, whether it be for internal or external billable projects.

AUTOMATICALLY CAPTURE HOURS WORKED FROM PROJECT COSTING FOR UTILIZATION

Capture actual hours worked for resources as part of the financial management of a project and use that information for utilization calculations. You can schedule regular updates to resource utilization metrics from actual hours captured on time cards.

EDIT MULTIPLE PROJECT RESOURCE ASSIGNMENTS AND REQUESTS

You can easily edit multiple project resource assignments and requests. For example, if project dates moved, you can quickly adjust the impacted project requests by the same number of working days. You can also easily maintain multiple project resource assignments and requests respectively.

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Integrated Cloud Applications & Platform Services