Oracle® Project Resource Management

User Guide

Release 11*i*

Part No. B12421-02

May 2005

ORACLE®

Oracle Project Resource Management User Guide, Release 11i

Part No. B12421-02

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Project Resource Management User Guide*.

This guide contains the information you need to understand and use Oracle Project Resource Management.

See Related Documents on page viii for more Oracle Applications product information.

TTY Access to Oracle Support Services

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Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Structure

1 Overview of Oracle Project Resource Management

This chapter describes the process flows and concepts of Oracle Project Resource Management.

2 Staffing Project Requirements

This chapter describes the creation and structures of project teams within Oracle Project Resource Management.

3 Candidate Management

This chapter contains instructions for searching for resources to fill requirements and managing the nomination and tracking process.

4 Schedule Maintenance

This chapter discusses the assignment approval workflow process and handling overcommitments.

5 Staffing Management

This chapter describes the staffing manager, resource manager, and team member activities.

Glossary

Related Documents

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Projects.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **Online Help** - Online help patches (HTML) are available on Oracle *MetaLink*.

- **About Documents** - Refer to the About Document for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents are available on Oracle *MetaLink*.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Projects (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle Projects Documentation Set

Oracle Projects Implementation Guide

Use this manual as a guide for implementing Oracle Projects. This manual also includes appendixes covering function security, menus and responsibilities, and profile options.

Oracle Projects Fundamentals

Oracle Project Fundamentals provides the common foundation shared across the Oracle Projects products (Project Costing, Project Billing, Project Resource Management, Project Management, and Project Collaboration). Use this guide to learn fundamental information about the Oracle Projects solution.

This guide includes a Navigation Paths appendix. Use this appendix to find out how to access each window in the Oracle Projects solution.

Oracle Project Costing User Guide

Use this guide to learn detailed information about Oracle Project Costing. Oracle Project Costing provides the tools for processing project expenditures, including calculating their cost to each project and determining the GL accounts to which the costs are posted.

Oracle Project Billing User Guide

Use this guide to learn how to use Oracle Project Billing to process client invoicing and measure the profitability of your contract projects.

Oracle Project Management User Guide

This guide shows you how to use Oracle Project Management to manage projects through their lifecycles -- from planning, through execution, to completion.

Oracle Projects APIs, Client Extensions, and Open Interfaces Reference

This manual gives detailed information about all public application programming interfaces (APIs) that you can use to extend Oracle Projects functionality.

User Guides Related to This Product

Oracle Assets User Guide

In Oracle Assets, you can post capital project costs to become depreciable fixed assets. Refer to this guide to learn how to query mass additions imported from Oracle Projects to Oracle Assets and to review asset information. Use this manual when you plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. The manual also describes how to define journal entry sources and categories so you can create journal entries for your general ledger. If you use multiple currencies, use this manual when you define additional rate types, and enter daily rates. This manual also includes complete information on implementing Budgetary Control.

Oracle General Ledger User Guide

Use this manual when you plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. The manual also

describes how to define journal entry sources and categories so you can create journal entries for your general ledger. If you use multiple currencies, use this manual when you define additional rate types, and enter daily rates. This manual also includes complete information on implementing Budgetary Control.

Oracle HRMS Documentation Set

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- **Using Oracle HRMS - The Fundamentals**

  This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- **Managing People Using Oracle HRMS**

  Use this guide to find out about entering employees.

Oracle Inventory User Guide

If you install Oracle Inventory, refer to this manual to learn how to define project-related inventory transaction types and how to enter transactions in Oracle Inventory. This manual also describes how to transfer transactions from Oracle Inventory to Oracle General Ledger.

Oracle Payables User Guide

Refer to this manual to learn how to use Invoice Import to create invoices in Oracle Payables from Oracle Projects expense reports data in the Oracle Payables interface tables. This manual also explains how to define suppliers, and how to specify supplier and employee numbering schemes for invoices created using Oracle Projects.

Oracle Project Manufacturing Implementation Manual

Oracle Project Manufacturing allows your company to associate manufacturing costs and inventory to a specific project and task. Use this manual as your first source of information if you are implementing Oracle Project Manufacturing.

Oracle Purchasing User Guide

If you install Oracle Purchasing, refer to this user guide to read about entering and managing the requisitions and purchase orders that relate to your projects. This manual also explains how to create purchase orders from project-related requisitions in the AutoCreate Documents window.

Oracle Receivables User Guide

Use this manual to learn more about Oracle Receivables invoice processing and invoice formatting, defining customers, importing transactions using AutoInvoice, and Defining Automatic Accounting in Oracle Receivables.

Oracle Business Intelligence System Implementation Guide

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS 11i User Guide Online Help

This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Using Oracle Time Management

This guide provides information about capturing work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before installing Oracle Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle Applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle Applications.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before you implement Oracle Projects. This manual details additional steps and setup considerations for implementing Oracle Projects with Multiple Reporting Currencies.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Projects with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Projects.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Projects implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle *MetaLink*.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and tells you how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Projects and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure,

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Projects working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Overview of Oracle Project Resource Management

This chapter describes the process flows and concepts of Oracle Project Resource Management.

This chapter covers the following topics:

- Introduction to Oracle Project Resource Management
- Process Flows and Concepts
- Setup Considerations

Introduction to Oracle Project Resource Management

Oracle Project Resource Management provides you tools to manage the deployment and capacity of your resources in a global environment. You use Oracle Project Resource Management--in conjunction with the basic project team definition functionality in Oracle Projects and the task staffing and forecasting functionality in Oracle Project Management--to manage your project resource needs, project profitability, and organization utilization, by locating and deploying qualified and available resources to your projects across your enterprise.

Oracle Project Resource Management enables project managers, resource managers, and staffing managers throughout the enterprise to manage their resources and more effectively communicate their needs to one another.

Features include:

- Searching for:
    - Qualified resources to match requirements
    - Requirements for which resources may nominate themselves
- Maintaining resource competency information
- Advertising for open requirements
- Tracking candidates for requirements
- Handling overcommitments
- Automatically processing approvals

Related Topics

Project Teams and Team Roles, *Oracle Projects Fundamentals*

Creating Task Assignments, *Oracle Project Management User Guide*

Generating Forecasts, *Oracle Project Management User Guide*

Process Flows and Concepts

You can divide the overall process flow of Oracle Project Resource Management into four segments: demand, supply, financial and operations management. Each segment has associated user roles.

Understanding the process flows and user concepts of resource management in Oracle Projects provides you with the appropriate knowledge for making decisions for your implementation.

Oracle Project Resource Management addresses the core staffing needs of the project life cycle. It pulls together the demand and supply of resources, to produce the operations and financial success of your projects.

Oracle Project Resource Management Process Flow

The process flow of resource management in Oracle Projects is divided into four segments: Demand, Supply, Financial, and Operations Management. These segments incorporate the staffing functionality provided by Oracle Project Resource Management with the project team development features available to all Oracle Projects users and the Oracle Projects Management functionality related to task-level resource assignments and forecast generation.

Each segment can be associated with a typical user role such as project manager, resource manager, staffing manager, team role, or financial analyst. These associations are not rigid but can overlap.

The following diagram illustrates how the different needs of the users can use the same data through process flows.

Oracle Project Resource Management Process Flow
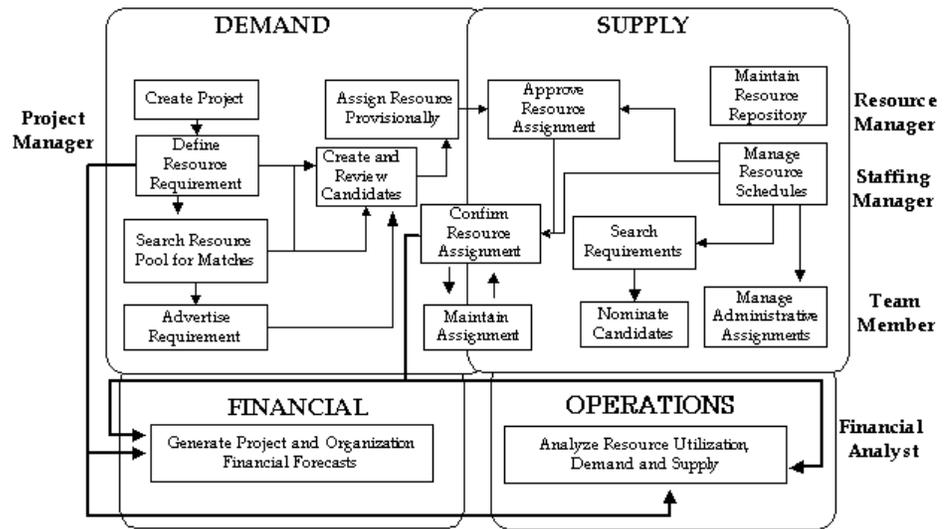
The objectives of the role a user is playing on a project drives the functions the user must perform. The implementation of Oracle Project Resource Management provides predefined roles to which you can add your own. In the above diagram, typical user roles are associated with the applicable process segments. For example, a Financial Analyst performs tasks related to financial management, and a Project Manager concentrates on tasks relating to project staffing from the demand side.

Project Manager

Project managers concentrate on project execution in the demand segment. Project managers create the project and define project-level resource requirements. They may also search the resource pool for matches and advertise for the requirement. They can then review the candidates on project requirements and create a provisional assignment for a selected resource. The provisional assignment is forwarded to the resource manager for approval. The project manager can bypass the search process and make a direct provisional assignment of the resource to the project. The project manager maintains the assignment based on changes to the project schedule.

> **Note:** The ability to create and maintain project-level requirements and assignments is provided by all Oracle Projects applications. Oracle Project Resource Management specifically enables resource searching, requirement advertisement, and approval routing. For more information about defining project teams through requirements and assignments, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

Oracle Project Management also enables project managers to create task-level resource assignments. They can also easily create project-level resource assignments for planning resources that have previously only been given task-level assignments. For more information, see Creating Task Assignments, *Oracle Project Management User Guide*.

Resource Manager

Resource managers concentrate on the supply segment, i.e. resources. Resource managers approve the resource assignments, and manage the resource repository. They typically are the HR supervisors of the resource.

Staffing Manager

Staffing managers also concentrate on the supply segment, i.e. resources. They are the users who have been charged with managing staffing. Staffing managers manage the resource schedules. They search requirements, nominate candidates to fill open requirements, and manage administrative assignments. They can also approve, confirm, and maintain resource assignments, if they have the necessary permissions.

Team Member

Team members are the resources of the project. They concentrate on performing the work. Team members can view their project assignments schedules, search for requirements and nominate themselves as candidates.

Financial Analyst

Financial analysts concentrate on the financial and operations segment. Financial Analysts analyze resource utilization.

If you use Oracle Project Management, your financial analysts can also generate project and organization financial forecasts.

Related Topics

Project Teams and Team Roles, *Oracle Projects Fundamentals*

Creating Task Assignments, *Oracle Project Management User Guide*

Generating Forecasts, *Oracle Project Management User Guide*

Utilization, *Oracle Projects Fundamentals*

User Roles

Oracle Project Resource Management provides functionality to meet the needs of several key user scenarios, each with its own set of responsibilities and related task flows. You can adapt these scenarios into your environment, or modify them accordingly.

You have the following user roles to address the issues of project staffing:

- Project Manager
- Staffing Manager
- Staffing Owner
- Resource Manager
- Team Member
- Business Manager

Project Manager

A project manager is the primary owner of a project. The project manager is generally responsible for maintaining a project through its life cycle from creation, building a team, tracking and maintenance, forecasting financial information for the project, and reporting. Building a team involves adding requirements, searching for resources in the resource pool, adding assignments, and creating and maintaining candidates for requirements.

The project manager initiates the creation of the project and requirements. In order to fill the requirements, the project manager must perform searches from which candidates can be identified. Once a candidate is selected, a provisional assignment is created for the resource. The provisional assignment is forwarded to the resource manager or primary contact for approval. If the project manager wants specific persons to fill requirements, the search step can be bypassed and direct provisional assignments can be made.

> **Note:** Functionality related to the creation of project roles, requirements, and assignments is common to all Oracle Projects applications. Oracle Project Resource Management enables specialized staffing functionality, such as candidate searching and approval routing. For more information, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

Maintaining a project includes maintaining project-related information such as project definition, schedules, and assignments. In addition, project managers often act as a primary contact for workflow notifications for the project.

Typical tasks of a project manager include:

- Building and managing teams.

- Creating and maintaining project resource requirements.

- Adding customer and partner organizations to projects to provide project roles for customers.

- Creating and applying a predefined set of requirements on a project by applying team templates to projects.

- Identifying resources from the planning resource list to fill the open team roles.

- Nominating candidates, reviewing candidates, and selecting the desired candidate to assign to fill a requirement (and by doing so, create an assignment).

- Creating and maintaining project resource assignments.

- Creating and maintaining task resource assignments.

- Viewing resource details and team schedule.

- Maintaining schedules for requirements and for resources on assignments.

- Generating project financial forecast information for one project or multiple projects based on authority.

- Viewing balances of unbilled receivables and unearned revenue for a project or a specific cost center in a project.

You must use Oracle Projects Management in order to generate financial forecasts. For more information, see Generating Forecasts, *Oracle Project Management User Guide*.

You must use Oracle Projects Management to create resource assignments at the task level. For more information, see Creating Resource Assignments, *Oracle Project Management User Guide*.

For more information on utilization reporting, see the following Discoverer Workbooks , *Oracle Projects Fundamentals* :

• Required Project Hours

• Team Role Details

Staffing Manager

Staffing managers are responsible for filling open requirements of a project with available resources. They fill the supply side of the task flows as they have access to all the resource data, know the availability of their resources, and manage the schedules and utilization of the resources. Staffing managers search for resources, nominate candidates, and fill open requirements, and can also approve assignments with the proper authority.

> **Note:** Functionality related to the management of project requirements and assignments is common to all Oracle Projects applications. Oracle Project Resource Management enables specialized staffing functionality, such as resource searching, competency tracking, candidate nomination and approval routing. For more information about team roles, requirements, and assignments, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

Upon identifying a possible match between a resource and an open role after considering competencies, schedule, job levels, and other comparable criteria, a staffing manager can nominate the resource as candidate for the requirement.

A staffing manager can also add assignments to administrative projects for managing activities such as off-site activities and training for the resources. Other duties include tracking resource schedules to minimize available time and increase utilization.

Typical tasks of a staffing manager include:

• Maintaining resource repository by updating information about resources. This information is used to match resources to requirements.

• Searching for requirements based on information such as time periods, required skills, and project types.

• Nominating available resources as candidates to requirements.

• Creating Administrative Assignments: Administrative assignments are regular assignments on indirect projects (projects which are non-revenue generating.) Administrative assignments such as vacation, training, and off-site activities are generally not included in forecast and utilization totals.

• Maintaining schedules for resources, identifying overcommitted and available resources, and approving resource assignments.

• Maintaining schedules for requirements and for resources on assignments.

• Identifying resources from resource repository to fill the open roles.

• Viewing projects details for both scheduled projects and pipeline activity.

• Tracking utilization totals for the organization and resources.

For more information on utilization reporting, see the following Discoverer Workbooks , *Oracle Projects Fundamentals* :

- Scheduled Resource Hours

- Available Resource Hours

- Overcommitted Resource Hours

- Team Role Details

- Required Project Hours

- Organization Competence Summary

Staffing Owner

A staffing owner is a person who is responsible for staffing project team roles and maintaining their information. Staffing ownership can be tracked at the organization, project, and requirement level.

- *Organization-level staffing ownership:* Staffing owners with organization-level authority are referred to as staffing managers. They own staffing for all project team roles in the organization, and can perform mass updates on a group of requirements to transfer their staffing ownership to other staffing owners. Organization-level staffing owners are essentially staffing managers. For more information about the Staffing Manager role, see Staffing Manager, page 1-6.

- *Project-level staffing ownership:* Staffing owners with project-level staffing ownership are referred to as project staffing owners. They are responsible for staffing team roles on specific projects. Multiple project staffing owner roles can be defined for individual projects. This enables sharing of responsibility for team role maintenance.

- *Responsibility-level staffing ownership:* Staffing owners with responsibility-level staffing ownership are referred to simply as staffing owners. They are responsible for staffing and maintaining individual requirements and assignments. Project managers can define a responsible staffing owner for each requirement in their project. Staffing owners have visibility only over the requirements to which they have been assigned.

Typical tasks of a staffing owner include:

- Updating owned requirements and assignments, with the exception of financial information.

- Searching for resources.

- Receiving candidate notifications for requirements.

- Nominating candidates for requirements.

- Assigning resources to requirements.

Resource Manager

A resource manager is the HR Manager or supervisor of the resource. Resource managers participate in managing resource schedules, creating and maintaining administrative projects, adding assignments to the administrative projects, resource approvals, performing utilization analysis, and managing the schedules and utilization of their direct reports (resources).

A resource manager can also add assignments to administrative projects for managing activities such as off-site activities and training for the resources. Other duties include tracking resource schedules to minimize available time and increase utilization.

Typical tasks of a resource manager include:

- Maintaining resource repository by updating information about resources. This information is used to match resources to requirements.

- Searching for open roles (requirements) based on information such as time periods, required skills, and project types.

- Nominating available resources as candidates to requirements.

- Creating Administrative Assignments: Administrative assignments are regular assignments on indirect projects (projects which are non-revenue generating.) Administrative assignments such as vacation, training, and off-site activities are generally not included in forecast and utilization totals. For more information about this topic, see Creating Administrative Assignments, *Oracle Projects Fundamentals*.

- Maintaining schedules for resources, identifying overcommitted and available resources, and approving resource assignments.

- Tracking utilization totals for the resources.

For more information on utilization reporting, see the following Discoverer Workbooks , *Oracle Projects Fundamentals*

- Scheduled Resource Hours

- Available Resource Hours

- Overcommitted Resource Hours

- Team Role Details

- Required Project Hours

- Organization Competence Summary

- Resource Competencies

Team Member

Team members are the resources. They can manage their own competence profiles and work information through the shared professional model of Self-Service Human Resources. Team members can also view their schedule of project assignments and search for requirements to nominate themselves as candidates.

Typical tasks of a team member include:

- Maintaining resource repository by updating the resource information. This information is used to match resources to requirements.

- Viewing their own resource utilization

- Searching for open roles (requirements) based on information such as time periods, required skills, and project types.

- Nominating themselves as candidates for requirements.

- Maintaining their own schedules by tracking their project and task assignments and making adjustments to their work patterns given the proper authority.

- Using Administrative Assignments: Administrative assignments are regular assignments on indirect projects (projects which are non-revenue generating.)

For more information about team roles, requirements, and assignments, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

For more information about administrative requirements, see Creating Administrative Assignments, *Oracle Projects Fundamentals*.

For more information about resource assignments for tasks, see Creating Resource Assignments, *Oracle Project Management User Guide*.

Business Manager

A business manager is primarily associated with a group of projects and is responsible for the financial numbers for these projects. Business managers can track project statuses, perform reporting analysis, and view resource utilization. Business managers can also access financial forecasts for a single project, a group of projects, or an organization.

Typical tasks of a business manager include:

- Viewing the team directory and the role information.
- Generating financial forecasts for one project or multiple projects based on authority.
- Generating financial forecasts for an organization manager's area of responsibility.
- Tracking utilization totals for the organization.
- Viewing balances of unbilled receivables and unearned revenue accounts for a project or a specific cost center in a project.

For more information on team roles, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

You must use Oracle Projects Management in order to generate financial forecasts. For more information, see Generating Forecasts, *Oracle Project Management User Guide*.

For more information on utilization reporting, see the following Discoverer Workbooks , *Oracle Projects Fundamentals*

- Scheduled Resource Hours
- Available Resource Hours
- Overcommitted Resource Hours
- Team Role Details
- Required Project Hours
- Organization Competence Summary
- Resource Competencies

Setup Considerations

Since Oracle Project Resource Management is integrated with applications such as Oracle Human Resources Management System (HRMS), and Oracle CRM, many interdependencies exist. A large portion of the information is loaded through these applications.

Determining the Deployment Method

Prior to implementing Oracle Project Resource Management, you must determine how you want to handle project staffing. You have three possible approaches in addressing who manages the task of project staffing:

• Centralized

  The centralized approach uses staffing analysts (resource analysts.) These analysts are responsible for managing requirements and assignments for all the projects of an organization.

• Decentralized

  The decentralized approach uses project managers, or project assistants, who work with resource managers to fill project requirements.

• Combination

  The combination approach is used by companies who have all these roles interacting in the effort to fill project requirements and to obtain the highest utilization of the available resources.

Creating and Maintaining Project Resources

All organization and people data is stored in Oracle Human Resources Management System (HRMS) tables. As most of these tables are shared, you can enter this information using Oracle HRMS and access the information through other Oracle applications such as Oracle Projects. However, if your business does not currently use Oracle HRMS, you can define people through Oracle Projects. In the context of Oracle HRMS and Oracle Projects, the term *people* refers to *employees* and *contingent workers*.

For information on implementing Oracle Project Resource Management, see Implementing Oracle Project Resource Management,*Oracle Projects Implementation Guide*. For information about contingent workers, see: Support for Contingent Workers, *Oracle Projects Fundamentals*.

Oracle Project Resource Management acquires resource information from the HRMS people tables. The resource information is obtained either through an automated deferred workflow process or by manually running the PRC: Maintain Project Resources process. See, Processes in Oracle Projects, *Oracle Projects Fundamentals*. The automated workflow process synchronizes the Oracle HRMS data with the Project Resource Management data automatically for the following situations:

• Changes are made to the resource profile

• When a person is added as a project member on a project and does not yet exist as a resource in Project Resource Management

The following criteria must be met in order for a person to be acquired from the HRMS system and qualify as a valid resource:

• The resource must have an active and current primary assignment.

• The resource must have a person type of Employee or Contingent Worker, or a person type that maps to the system person type of Employee.

• The end date of the assignment should be later than the current (system) date.

• The primary assignment must have a defined job. This job must be mapped to to a master job group with an associated job level.

- The primary assignment organization must:
    - have a default operating unit; this operating unit must implement Oracle Projects
    - Have a specified default calendar or, the profile option PA: Default Calendar must have a defined value
    - Have the classification of Project Expenditure/Event Organization
    - Belong to the project expenditure hierarchy

  If you have a problem with acquiring information for a particular resource into Project Resource Management and you have verified all of the qualifying criteria, contact your system administrator for assistance.

2

Staffing Project Requirements

This chapter describes the creation and structures of project teams within Oracle Project Resource Management.

This chapter covers the following topics:

- Overview of Staffing Project Requirements
- Competencies
- Advertisements and Advertisement Rules
- Candidates

Overview of Staffing Project Requirements

You can staff project requirements based on competencies, advertisements and advertisement rules, and candidates. A set of competencies is defined for every requirement. The requirements are advertised both inside and outside an organization. Suitable candidates whose competencies match the advertisements, page 2-2 are eligible for filling the requirements.

Competencies

The specified role provides default values for the competencies and associated information. However, you can add, modify, or delete as necessary for the requirement.

If a requirement has assigned competencies, a structure exists in which you can perform competence matching to find potential candidates for requirements.

You define project requirements using the Requirement Detail page. The system copies the competencies of the project role to the requirement to which they can add, modify, or delete as meets their needs. Each competence determined to be mandatory for the requirement must have the required range of proficiency specified in that skill. This range is used for comparison during a resource search.

> **Note:** You can assign global competencies to a requirement, as well as local competencies belonging to the business group of the requirement.

Related Topics

Project Teams and Team Roles, *Oracle Projects Fundamentals*

Defining Scheduled Team Members, *Oracle Projects Fundamentals*

Advertisements and Advertisement Rules

Advertisement rules control the visibility of a requirement both inside and outside an organization. An advertisement rule contains actions that direct the channeling and timing of the requirement advertisement. See also, Auditing Advertisement Rules, page 2-4 and Replacing an Advertisement Rule on a Requirement, page 2-3.

For more information about the creation and maintenance of project requirements, see Defining Scheduled Team Members, *Oracle Projects Fundamentals*.

Advertisement Rule For a Requirement

The requirement uses the default advertisement rule of the project. However, you can add, update, or delete the advertisement rule actions, or replace the rule entirely. You also can stop the rule from further processing, and resume the processing when appropriate.

Each action of the advertisement has a qualifying condition. Therefore, in order for the action to occur, the associated condition must be met. The conditions are either the number of days since the advertisement rule was started on the requirement, the number of days remaining until the start date of the requirement, or a combination of the two.

Oracle Project Resource Management evaluates the open requirements that have an advertisement rule with a status of "Started" and performs all of the actions where the conditions are met. This evaluation process called Perform Action Rules is a concurrent process that is scheduled by your system administrator. See, Project Resource Management Processes, *Oracle Project Fundamentals*.

You can use the advertisement rule to control the escalation of a requirement as the current system date nears the requirement start date. To demonstrate the escalation of a requirement, the following table lists an advertisement rule with various actions:

Condition	Action
Days since started: 0	Publish to staffing managers on East Coast
Days since started: 7	Publish to all resources on East Coast
Days since started: 14 or Days remaining: 14	Update staffing priority to Critical
Days since started: 21 or Days remaining: 7	Send notification to staffing owner of the project
Days since started: 30	Cancel advertisement

As the requirement ages, it becomes visible to more people and the staffing prioirity is set to Critical. As more time passes, the staffing owner of the requirement is alerted that the requirement is still open, and then, finally the advertisement for the requirement is canceled. When you fill a requirement, the advertisement rule on the requirement stops and does not perform any outstanding actions.

Using Advertisement Rules

Each project has a default advertisement rule that is obtained from the project template. You can change this advertisement rule or accept it as is. Subsequently, this advertisement rule becomes the rule for every newly created requirement on the project.

For each requirement, you can either use the predefined actions of the default rule or change the actions to meet your needs. You cannot update performed actions. The actions are as follows:

- **Publish to All**: Make advertisement visible to entire site, across all organizations on the Staffing Home, Requirement List, and Requirement Search Result pages.

- **Publish to Project Authority**: Make requirement visible to people with project authority within a specified organization on the Staffing Home, Requirement List, and Requirement Search Result pages.

- **Publish to Organizations**: Make requirement visible to everyone within a specified organization in a specified organization hierarchy on the Staffing Home, Requirement List, and Requirement Search Result pages.

- **Escalate to Next Level**: Make the requirement visible to everyone in the next level within the organization hierarchy. This action is only valid if the previously defined action is Publish to Organizations.

- **Send Email**: Send an email notice to a specific email address. You can use any external email address. You can also enter multiple email addresses separated by a comma.

- **Send Notification to Person**: Send a notification to a specified person regarding the requirement.

- **Send Notification to Project Role**: Send a notification to a specified role on the requirement-owning project.

- **Update Staffing Priority**: Update the staffing priority of the requirement.

- **Cancel Advertisement**: Remove visibility of the requirement in all pages and searches. This action automatically occurs when a requirement is filled.

You can indicate to either begin the advertisement rule automatically upon the requirement creation, or activate the rule manually for each requirement. You can pause the advertisement rule or resume at any time.

If you change the start date of the requirement or update the advertisement rule, the system re-evaluates and processes all of the advertisement rule actions as follows:

- Reverses any actions that have been performed but do not meet the criteria.

- Initiates any actions that have not been performed and do meet the criteria.

Replacing an Advertisement Rule on a Requirement

You can replace an advertisement rule on a requirement at any time. When you replace a started advertisement rule, Project Resource Management reverses any actions on that rule that have been performed. The system also performs any qualified actions of the new advertisement rule.

For example, you advertise a requirement to a particular division within the organization as a result of an advertisement rule action, and then, you replace the rule on the requirement. The system reverses that action and the requirement is no longer visible in

requirement searches performed within that division. Then, the system evaluates the actions on the new rule and performs those where the conditions are met.

Auditing Advertisement Rules

Every time the system performs an advertisement rule action on a requirement, a recording entry appears in the advertisement audit history of the requirement. The entry provides you with information on the action including the qualifying condition, the date the action was performed, and the result of the action.

Each action can generate multiple transactions, and therefore, cause multiple entries in the audit history . For example, when the action Publish to Organiations occurs, then an entry appears for each organization in the hierarchy under the specified organization. If the specified organization has five suborganizations, then five entries appear.

Each audit entry includes an audit reason. The explanations of the reasons you may see are as follows:

- **Condition Met**: The action was performed because the condition was met.

- **Deleted**: The action was reversed because the action was deleted.

- **Updated**: The action was reversed because the requirement start date was updated.

- **Rule Canceled**: The action was reversed because the advertisement rule was canceled.

- **Rule Cancellation Deleted**: The action is re-activated because the Cancel Advertisement action was deleted.

> **Note:** If the system cannot perform an action, then an error explaining why the action failed appears in the audit history.

Candidates

All active candidates for the requirement appear in the order of ranking value, then score. You can change the weighting values for the score on the Candidate Score and Search Settings page. Any change in these weightings is immediately reflected in the score of the current candidates.

3

Candidate Management

This chapter contains instructions for searching for resources to fill requirements and managing the nomination and tracking process.

This chapter covers the following topics:

- Overview of Candidate Management
- Resource Search
- Candidate Nomination and Approval

Overview of Candidate Management

You use the resource pool to search for eligible candidates. Candidates are the nominated resources for open requirements. After the Oracle workflow approval, candidates work for a project.

Candidate Lifecycle

The candidate life cycle begins with the search for candidates for open requirements. Candidates are nominated for requirements, their qualifications and competencies reviewed, and finally selected and assigned.

The candidates can also be assigned directly to fill the requirement. The team roles and staffing processes have some required and optional predefined behavior. You can define this default behavior through profile options, statuses, and other attributes.

Related Topics

Project Requirements, *Oracle Projects Fundamentals*

Project Assignments, *Oracle Projects Fundamentals*

Implementing Oracle Project Resource Management *Oracle Projects Implementation Guide*

Resource Search

You perform resource searches primarily to fill a resource requirement on a project. They can also be performed independent of filling a specific requirement and to just search the resource repository for having specific resources.

For more information about the creation and maintenance of project requirements and assignments, see Defining Scheduled Team Members, *Oracle Projects Fundamentals*.

When performing a resource search for a requirement, the dates of the requirement are compared with the availability of the resource. If these time periods match, the resource is considered a candidate for the requirement given the other search criteria for the requirement also matches.

Only valid resources (including future-date people) are considered in resource search queries. Valid resources include both employees and contingent workers. In order for a person to be considered a qualified resource within Oracle Project Resource Management, certain criteria must be met. For a complete list of the criteria, see: Processes in Oracle Projects, *Oracle Projects Fundamentals*. For information about contingent workers, see: Support for Contingent Workers, *Oracle Projects Fundamentals*.

A single collection of your resources, their skill sets, and their availability enables you to utilize and manage your resources both effectively and efficiently. To establish such a resource pool, you must understand your enterprise structure, the job groupings, and the required and desired competencies of the resources.

This section describes the resource pool and how to perform resource searches on it.

Resource Pool Definition and Resource Profile Maintenance

The resource pool is the collection of all your valid resources into a single group. Each individual within your resource pool has various attributes defined such as personal information, work patterns, location, and competencies. Through entering this information as accurately as possible, you gain the following benefits:

- Resources with consistent information from which to search

- Secured single-source access to information such as personal information, resume, and competencies

- Precision in matching resources with requirements

- Forecasting based on resource needs

- Resource utilization manageability

Search Criteria

When searching your resource pool for potential matches to requirements you specify certain criteria to limit the search. You can also search for a resource that meets specific criteria outside the context of a project requirement. This search includes all the attributes used for the requirement-based resource search. You can access this search when you login using your responsibility.

> **Note:** The search criteria fields is defaulted from the requirement definition for a requirement-based resource search.

You can refine the search on your resource pool to match resources to a requirement with the following fields:

Organizational Hierarchy

This field value identifies the project expenditure/event organization hierarchy in which to conduct the search for resources. The default hierarchy value is the project expenditure

hierarchy assigned to the operating unit for your current logon responsibility. You can change this value to any project expenditure/event organization hierarchy.

Starting Organization

This field value identifies the organization from which to start the search within the specified project expenditure/event organization hierarchy.

Minimum Availability

The minimum required definite availability match percentage of the resource to be returned as a match, based on the confirmed assignments of the resource.

The availability of a resource is considered from the current system date and does not reflect any past dates. For example, you have a requirement that spans four weeks with the start date that began last week. If a resource is found to have the next three weeks 100% available, then that resource is considered as a 100% match without any regard to the availability of the resource for the first week of the requirement. A resource search will not return results if the end date of the requirement is prior to the current date.

In order for a resource to qualify for the search results, the resource must have availability records for at least a portion of the assignment duration. An availability record represents each day a resource has availability. These records are generated for a specific time period in the future for every resource. The specific time period is determined by the profile option PA: Availability Duration. For example, you have a requirement with a time length of two years but a resource has availability records for only the next year with availability (meaning these records are not used for other confirmed assignments), the resource will still be delivered in the search results as a potential match.

You can view the availability of a resource on the timeline on the Resource Details page. The displayed availability may not be correct if the resource does not have an assigned calendar for the duration of the requirement or the calendar schedules have not been generated or updated for the period. See also, Availability Percentages, page 3-6.

Candidate Score Weightings

The weightings default from the requirement, but can be changed while performing a resource search. For more information, see Candidate Score Weightings, page 3-8.

Optional Search Criteria

In addition to specific search criteria, you can also search for resources using the following optional search criteria:

Include Provisional Assignments in Availability Calculation

If selected, the Minimum Availability percentage specified above is calculated using both the confirmed and provisional assignments. This means that the resource must have both a definite and potential availability match percentage greater than the minimum availability percentage specified, in order to be returned. For more information, see Availability Percentages, page 3-6.

Minimum and Maximum Job Levels

Each project requirement has defined minimum and maximum job levels for the purpose of resource searching. During a search, the job levels of the resources are compared to the minimum and maximum job levels of the requirement. If the job level of a resource

falls between the minimum and maximum job levels of the requirement, the resource is considered a possible match for the requirement given other search criteria are met.

The default values of the Minimum and Maximum Job Level fields come from the levels defined on the requirement, but you can modify them on the Modify Search Criteria page. Modifying these values on this page does not change the original definition on the requirement. The original definition of the requirement is available on the Requirement Details page.

The minimum and maximum job levels are based on the job levels associated with the job group specified as the value for the profile option PA: Project Resource Job Group. For this profile option, you enter the name of the job group you want used as the collection of jobs included in searches. This profile option is set at the site level only.

You can use the master job group as the value of this profile option, but remember that it includes every job. If you have jobs that you do not want included in job searches such as accounts payable jobs, administrative jobs, and human resource jobs that are not related to staffing projects, then you can set up a separate job group specifically for searching. This job group should include all jobs that you want included in searches.

Competencies

All mandatory and optional competencies of the requirement are compared to those of the resource. Resources with the mandatory competencies and desired competence levels are potential matches given the other search criteria are met. If a competence associated with a resource or requirement has no defined proficiency level, then it is considered to be at the lowest proficiency level.

For each matching resource, the matches between the optional competencies of the requirement and the competencies of the resource display in the following format: 0/2. The first number indicates the number of matches, and the second number refers to the actual number of optional competencies of the requirement. For example, 4/5 means that the resource has four of the five optional competencies at the specified proficiency level for the requirement.

The competencies in the search criteria page default from the competencies defined for the requirement. However, you can modify these competencies and their associated proficiency levels and mandatory flag settings on this page. Your modifications are specific to this search only, and do not change the original definition on the requirement.

In addition to specifying individual competencies, you can also just specify a parent competence, where a parent competence is a rollup of many competencies with the same competence structure. All resources with any competence in that parent competence at the specified proficiency level will be considered as match for the criteria. For example, you can search for resources that have skill in the parent competence "Oracle Technical...", instead of specifying the detailed child competencies within the parent, such as "OracleTechnical: SQL" or "OracleTechnical: PLSQL" or "Oracle Technical: Forms."

To speed up your competence entry in your search criteria, you can copy role competencies predefined roles. For example, if you are searching for a database engineer, instead of entering in each competence for the database engineer, you can copy the already defined competencies associated with the role of the database engineer.

Include Work Preferences

The work preferences are defined by the resources in their Professional Details profile in Self Service Human Resources. If you choose to search based on work specified

preferences, then only the resources that have the matching work preference defined in their profile will be returned. If you do not select any work preference option in the search criteria, then the work preferences are not considered for finding matching resources.

Location

The location refers to the country, state and city of the primary address of the resource. If you specify a location of city, state, or region in the search criteria, the search will return resources who have matching locations, as well as resources who do not have any locations defined in HR.

If the country, state and city of a resource is a valid match to the criteria as of the start date of the requirement, then the location of that resource is a match. For example, if you are searching for resources in a specific country, the search process compares the start date of the requirement to the effective date of the address for each resource to identify potential matches. Therefore, if a resource is moving to the identified location prior to the start of the requirement, the resource may be a potential match for the requirement.

Search Results

The results display all resources that match the mandatory competencies and meet the other defined criteria. For each matching resource, the matches between the optional competencies of the requirement and the competencies of the resource are displayed in the following format: 0/2. The first number indicates the number of matches, and the second number refers to the actual number of optional competencies of the requirement. For example, 4/5 means that the resource has four of the five optional competencies at the specified proficiency level for the requirement.

When a parent competence is part of the search criteria, any resource with at least one competence in that parent is returned and shown to have a match of 1. If no competence is found, the resource will have a match of 0. When a parent competence is specified in association with proficiency levels, only a resource with a competence in the parent competence with a proficiency level equal to or higher than the specified proficiency level is returned. If the parent competence specified is mandatory, then only those resources with at least one competence in that parent competence are returned; if the parent is not mandatory, then it will not be used to filter resources, and will only be used in calculating the competence match and score values.

You can also assign a resource to fill the requirement for the full or partial duration. See also, Assigning Resources to Assignments, *Oracle Projects Fundamentals*.

If you specified a resource and checked the Restrict to Resource's Competencies check box, only those requirements for which the resource meets all the mandatory competencies are returned as results.

If you specified a resource but did not select the Restrict to Resource's Competencies checkbox, then the mandatory competencies are not considered. All requirements matching the search criteria display as your search results. However, a competence comparison match appears for each requirement. This match indicates the total number of competencies, both mandatory and optional, that the resource and requirement have in common. For example, a competence match result of 4/5 means that the resource has four of the five competencies defined for the requirement.

If no resource was specified, competencies are not considered and all requirements matching your specified search criteria display as the search results.

From the results, you can nominate yourself or your resource as a candidate to fill a requirement. For more information on candidate nomination and approval, see Candidate Nomination and Approval, page 3-7.

Availability Percentages

Percentages used in search to compare availability are of two types, depending on the context of your resource search:

- The Availability match percentage is the percentage of time a resource is available to work for a specific project requirement. It is calculated as [resource's (capacity hours - assigned hours)] /requirement hours*100.

- The Availability percentage measures the percentage of time the resource is available to work, simply based on their capacity to work. It is calculated as [resource's (capacity hours - assigned hours/capacity hours)]*100.

Both measure the percentage of the availability of the resource to work. The availability match percentage is to fill a specific requirement, while the availability percentage just measures the availability of the resource and is independent of filling a specific requirement.

Both the availability percentages above have two views, which are displayed in the resources search results.

- Definite availability is based on the confirmed assignments. Therefore

  - Definite availability match percentage is [resource's (capacity hours - confirmed assignment hours)] /requirement hrs)*100]

  - Definite availability percentage is [resource's (capacity hours - confirmed assignment hours/capacity hours)]*100

- Potential availability is based on the confirmed and provisional assignments. Therefore

  - Potential availability match percentage is [resource's (capacity hours - confirmed assignment hours - potential assignment hours)] /requirement hrs)*100]

  - Potential percentage is [resource's (capacity hours-confirmed assignment hours - potential assignment hours/capacity hours)]*100.

  For example, a resource who has a weekly capacity of 40 hours, is confirmed on an assignment for 20 of those hours. If you have a requirement for 20 hours, the resource will show to have a definite availability match percentage of 100% [resource's (capacity hours - confirmed assignment hours)] /requirement hrs)*100 as he is available for the entire required hours. If you simply search for this resource outside the context of filling a requirement, his definite availability percentage is 50% [resource's (capacity hours-confirmed assignment hours/capacity hours)]*100 and he has 50% of his capacity already committed.

If this resource also has a provisional assignment of 10 hours, his potential availability match percentage is 50% [(40 capacity hours-20 confirmed assignment hours - 10 potential assignment hours/20 requirement hours*100], and his availability percentage is 25% [(40 capacity hours - 20 confirmed assignment hours - 10 potential assignment hours)/ 40 capacity hours*100].

The availability percentage of a resource is considered from the current system date and does not reflect any past dates. For example, you have a requirement that spans four

weeks with the start date that began last week. If a resource is found to have the next three weeks 100% available, then that resource is considered as having a 100% available match without any regard to the availability of the resource for the first week of the requirement. A resource search will never return any results when the requirement is completely in the past (when the end date of the requirement is prior to the current date.) In order for a resource to qualify for the search results, the resource must have availability for at least a portion of the assignment duration.

You can view the availability of a resource on the timeline on the Resource Details page.

Qualification of Available Resources

The determination of available resources is based on the setup defined by the implementation team. The setup includes the availability calculation period (daily or weekly), and the minimum available percentage of capacity for a resource to be deemed as available.

A resource is considered available and is shown on the staffing pages as well on timelines based on the following calculations:

1. The available hours of the resource = (capacity hours - confirmed hours) is calculated based on weekly or daily basis, as determined by the setup. For example, consider a resource with capacity of 40 hours (8 hrs over 5 days), if the resource has 40 confirmed hours over 4 days (10 hrs per day), the resource is considered available for 8 hours on one day using the daily basis but not available using the weekly basis.

2. The availability percentage (available hours/capacity hours*100) is then compared to the threshold percentage setup by your implementation team. If the availability percentage is more than the threshold percentage then the resource is considered an available resource. For example, if the minimum threshold percentage specified is 30%, all resources that are available for more than 30% of their capacity are shown as available, starting from the date that they meet this criteria.

Candidate Nomination and Approval

You can nominate candidates for a requirement to track a list of potential people whom you may want to assign to fill the requirement. As the candidates are nominated, an Oracle Workflow process notifies the resource manager, the staffing manager, and the resource of the nomination. This list of notification recipients may vary depending upon the implementation of the workflow processes.

Any project member with the proper authority can view the list of candidates for a given requirement, and review the candidate information on an individual basis. The status indicates where the candidate is in the review process.

If a resource is declined as a candidate on a project, the status of the candidate is changed to Declined. This status initiates another Workflow notification process. This process notifies the candidate, the manager of the resource, and their staffing manager of the change in status and the reason. However, a notification is not sent to the person who declined the candidate, if that person is one of these individuals.

> **Note:** A candidate may withdraw themselves for consideration at any time.

Candidates are assigned a score based on the weightings defined for the requirement. This score helps identify the level of match between the requirement and

candidate. For information on the candidate score and system-nominated candidates, see Candidate Scoring and Automated Nomination process, page 3-8.

Candidate Scoring and Automated Nomination Process

To assist your users in staffing requirements, you can set up an automated search and nomination process to identify and nominate resources as candidates for open requirements automatically. The setup includes definitions for both calculating the candidate score and performing automated searches for candidates. Setup of these features is required only if you choose to use this functionality.

Candidate Score Weightings

Candidate score weightings enable you to define the level of importance of the availability, competencies, and job level of the resource when matched to the specifications of a requirement. These weightings are used to calculate a score for each resource identified by a resource search and for every candidate on your requirements. This score helps you identify the stronger candidates based on the weightings. A high score indicates a better match.

The formula for calculating the scoring percentage is as follows:

[(Competence Match)(Competence Match Weighting) + (Availability Match)(Availability Match Weighting) + (Job Level Match)(Job Level Match Weighting)]

divided by:

[Competence Match Weighting + Availability Match Weighting + Job Level Match Weighting]

You define these weighting values at the Requirement level. Default values appear for your requirement if they have been defined for the project or project template. You can change these values at any of these levels. You can also temporarily change these values when performing a resource search.

Automated Search and Nomination

You can define the candidate score weightings and set up your preferences for the automated candidate nomination process using the Candidate Score and Search Settings option.

This search process identifies resources that meet the specified criteria for the requirement, including the candidate score, and nominates those resources as candidates on the requirement. This search is an automated process that can be implemented to run on a regular frequency, such as, daily or weekly.

All of the requirements for a project are included in the search process if the Enabled Automated Candidate Nomination Requirements check box is selected on the Staffing Information page of the project. However, you can select or de-select this check box for individual requirements.

All candidates nominated by this process have a status of System Nominated. If you find a candidate you want to keep, from the Candidate List page, change the System Nominated status of the candidate to any user-defined status to indicate that the candidate is under review. If you leave the status as System Nominated, then the candidate is re-evaluated the next time the process is run, potentially risking the loss of that candidate to another assignment.

Resources are matched against the search criteria defined in the Automated Search and Nomination fields of the requirement. These fields are:

- Minimum availability

- Organization hierarchy

- Starting organization

- Country

- Minimum candidate score

- Minimum and maximum job levels

- Requirement dates matched to availability dates

- Competencies

All matching resources are nominated as candidates for the requirement and assigned a candidate status of System Nominated. If the user does not change this status, the candidate is re-evaluated to determine if a match still exists for the requirement the next time the automated search process is run. The user can prevent a candidate from being reconsidered by the automated search process by changing the candidate status to any other candidate status. For more information on candidate statuses, see Implementing Oracle Project Resource Management *Oracle Projects Implementation Guide*.

If you do not enable the automated search process for a project or requirement, or if a requirement is excluded from the automated search, the search process still uses the Automated Search and Nomination values to identify qualified requirements for resources. Resources can nominate themselves as candidates from their Candidacy Lists for these requirements.

Related Topics

PRC: Automated Candidate Search Process, *Oracle Projects Fundamentals*

4

Schedule Maintenance

This chapter discusses the assignment approval workflow process and handling overcommitments.

This chapter covers the following topics:

- Overview of Schedule Maintenance
- Assignment Approval
- Overcommitments

Overview of Schedule Maintenance

You can view the stage at which an assignment exists. You approve an assignment using the Oracle Workflow or manually. Approvers can approve or reject an assignment. Rejected assignments can be updated and resubmitted for approval.

You identify the overcommitted hours for a resource and handle it.

Assignment Approval

To view the approval status of an assignment, click on the Team Role in the Resources page. The approval status represents the current stage of approval of the assignment.

If Oracle Workflow is enabled, you can specify a sequential list of approvers. The workflow process automatically forwards the approval forms to the approvers in the specified order. If Oracle Workflow is not enabled, then you must manually contact the listed approvers.

If you have authority to approve the assignment, you can approve it immediately or submit the assignment through the approval process. In either case, you must identify one or more approvers for the assignment confirmation.

During this process, the resources are checked for potential or existing schedule conflicts. If conflicts exist and the resource is overcommitted beyond the defined level of acceptability, then the assignment request is flagged as having conflicts.

Once an assignment is approved, the approval status of the assignment is changed to Approved and the schedule status of the assignment is changed to a confirmed system status. If the assignment is rejected, you can make changes to the assignment and resubmit it through the approval workflow process.

Related Topics

Defining Scheduled Team Members, *Oracle Projects Fundamentals*

Assigning People To Projects, *Oracle Projects Fundamentals*

Approval Process for Updates to Assignments

After you update information for a group of assignments or you add an assignment or an administrative assignment to a select group of resources, you can submit them for approval. If you have approval authority over some of the selected resources, then you can approve the transaction immediately for those resources either individually or all at once by clicking the Automatically Approve check box. If you select this check box, approval of the specified assignments will automatically occur upon submission.

Update requests for all other resources will be forwarded to the appropriate person for approval. The primary contact is by default the first approver and the resource manager is by default the second approver. You can change these approvers as necessary. If a particular transaction does not require approval, then a notification is sent to the approvers for each resource describing the update.

Overcommitments

The determination of overcommitted resources is based on the setup done by the implementation team. The setup includes the same calculation period (daily or weekly) as used for determining available resources, and a separate overcommitment threshold percentage.

A resource is considered overcommitted and shown on the staffing pages as well on the timelines based on the following calculations:

1. The overcommitted hours = (confirmed hours - capacity hours) are calculated based on a weekly or daily basis as determined by the setup. For example, consider a resource with capacity of 40(8 hours * 5 days), if the resource has 40 confirmed hours over 4 days (10 hours per day), the resource is considered overcommitted for 2 hours on 4 days on a daily basis, but not on a weekly basis.

2. The overcommitment percentage(overcommitted hours/capacity * 100) is then compared to the overcommitment threshold percentage setup by your implementation team. If the overcommitment percentage is more than the threshold percentage, then the resource is considered overcommitted. For example, if the minimum threshold percentage specified is 30%, all resources that are overcommitted for more than their 30% of their capacity are shown as overcommitted starting from the date that they meet this criteria.

    > **Note:** Availability and overcommitment is only generated for a resource through a maximum period of time in the future, as defined in the setup. Therefore, if you are looking for available or overcommitted resources beyond this time period (for example beyond two years from today) you may not see accurate data.

Handling Overcommitments

Resources are considered overcommitted when their confirmed assignment hours exceed their capacity by a specific percentage within a given period. If you add an assignment to a resource that is overcommitted, you have the options of either continuing to create

the new assignment with the conflicting assignments or to remove conflicting hours from the confirmed assignments.

If you choose to continue, the new assignment is submitted for approval, and the approver is warned of the overcommitment. If you choose to remove the conflicts, the number of conflicting hours are removed evenly from the conflicting confirmed assignments after the assignment is approved. For example, you have two confirmed assignments on a resource that are scheduled as follows:

• Assignment A: 6 hours

• Assignment B: 2 hours

Assume that the capacity of the resource is 8 hours per day. If you add a third assignment of 2 hours to this resource for the same day, a conflict is created. The resource will have an overcommitment of 2 hours. If you choose to remove the conflict, one hour is removed from both Assignment A and Assignment B. Therefore, your assignment for this resource on this day will look as follows:

• Assignment A: 5 hours

• Assignment B: 1 hour

• Assignment C: 2 hours

Notifications are sent to both the requester and approver of an assignment when an overcommitment case is encountered. The notification to the requester provides a link to handle the conflicts. You have a choice to continue the process by either allowing or removing the conflicts.

The notification provides you with the number of conflicting days. This number reflects the true number of days in conflict. Therefore, if 16 hours are scheduled for the same day on an 8 hour daily capacity schedule, "1" appears as the number of days in conflict.

If you are the approver, you can view the conflicts and select the appropriate approval action for each overcommitment case.

The overcommitment check for a mass submission of assignments is handled through a workflow process. You can select in advance how to handle any encountered overcommitments. If you choose to be notified for each encountered overcommitment, workflow notifications provide you with the necessary information and available options.

5

Staffing Management

This chapter describes the staffing manager, resource manager, and team member activities.

This chapter covers the following topics:

- Overview of Staffing Management
- Staffing Home Page
- Resource Management

Overview of Staffing Management

You can view open requirements, available resources, and overcommitted resources. To perform staffing activities, the privileges are different for a resource manager, a staffing manager, and a team member.

Staffing Home Page

You can use the Staffing Home page to view open notifications, view available resources and match requirements to the available resources. You can also view open requirements and match resources to the open requirements and view overcommitted resources.

You can navigate from the Staffing Home to the My Requirement page from where you can update a schedule for a resource, search and assign resources and update requirements.

You can also navigate from the Staffing Home to the My Resources page from where you can add administrative and delivery assignments.

Resource Management

As a resource and staffing manager you can view resources, manage their assignments, track their schedules, and fill open requirements. This section describes the resources displayed to you based on your role.

As a Resource Manager

If you login using a resource manager responsibility, you can view all resources who report to you directly or indirectly via the HR supervisor hierarchy. No additional setup steps are required to grant this security to any responsibility, user, or person. See, Security in Oracle Projects, *Oracle Projects Fundamentals*.

As a resource manager you can view all the schedules and profiles of your resources, nominate them as candidates, assign them on projects, confirm their resource assignments, and view their utilization.

Resource managers can also maximize the resource utilization by monitoring the utilization for all resource hours for the selected time period for resources currently assigned to the resource manager regardless of organization assignment. The Resource Manager can view the utilization totals through the Resource Utilization by Resource Manager page. For a discussion on how calculations for the totals on this page are defined, see Utilization, *Oracle Projects Fundamentals*.

As a resource manager you need to perform many functions related to your staff; these include:

- Finding project work for your staff
- Reviewing and approving vacation requests
- Planning training
- Updating project assignment
- Reviewing and approving competencies
- Reviewing and approving timecards
- Tracking utilization for yourself and your group

Related Topics

Resource Manager, page 1-7

As a Staffing Manager

If you login using a staffing manager responsibility, you can view all resources over which you have organizational resource authority. You can also view open requirements that have been advertised to you and for your organization.

As a staffing manager you are responsible for matching available resources with requirements and staffing the project with the enterprise resources. Your duties can include the following:

- Assigning a resource
- Fill open requirement by
  - Searching for requirements
  - Analyzing schedules for availability (Timeline)
  - Nominating a candidate
  - Approval workflow and process

  As a staffing manager you can also coordinate staffing for a group of resources. Staffing includes finding and assigning, and getting approval of work assignments for your group of resources.

Related Topics

Staffing Manager, page 1-6

As a Team Member

As a team member, you can view and update your information, and review your personal utilization. You can view and update information for yourself and your resources from the Team Member Home page using the following page selections:

Candidacy List

Track the nomination of the resource on various requirements. You can also go to the Withdraw Candidate page from this page to withdraw a nomination of a candidate from a requirement. For more information on candidates, see Candidate for Requirements, page 3-1.

Qualified Candidates

View requirements for which you are qualified to become a candidate. Nominate yourself as a candidate for those requirements you have interest.

Competencies

View your competencies through this page. You update your own competencies in your Professional Details profile using the Employee Self Service Human Resources responsibility. If you are a manager, you can update competencies for other resources using the Employee Self Service Human Resources Manager responsibility.

Schedule

Use the Schedule page to track your schedule. Given super security, you can assign yourself on administrative and delivery assignments. By default, the schedule list shows all current assignments for the next six months. You can use the search and personalize option to change the schedule assignment shown.

For more information on schedules, see Person Resource Schedules, *Oracle Projects Fundamentals*.

Work Information

Use this page to review your basic information.

- The staffing manager is the person with primary resource authority over the organization to which you belong.

- The calendar determines your capacity, which includes the work pattern and your calendar exceptions, such as holidays.

The Employee Information displays your information as defined in the Human Resources system.

Team members can monitor their personal performances through viewing all their reported and assigned hours for a selected time period through the Personal Utilization page.

For information on the calculations of the utilization totals, see Utilization, *Oracle Projects Fundamentals*.

Glossary

account

The business relationship that a party can enter into with another party. The account has information about the terms and conditions of doing business with the party.

account combination

A unique combination of segment values that records accounting transactions. A typical account combination contains the following segments: company, division, department, account and product.

Account Generator

A feature that uses Oracle Workflow to provide various Oracle Applications with the ability to construct Accounting Flexfield combinations automatically using custom construction criteria. You define a group of steps that determine how to fill in your Accounting Flexfield segments. You can define additional processes and/or modify the default process(es), depending on the application. See also

See also: activity, page Glossary-2, function, page Glossary-20, item type, page Glossary-26, lookup type, page Glossary-29, node, page Glossary-31, process, page Glossary-35, protection level, page Glossary-38, result type, page Glossary-41, transition, page Glossary-49, Workflow Engine, page Glossary-51

Account segment

One of up to 30 different sections of your Accounting Flexfield, which together make up your general ledger account combination. Each segment typically represents an element of your business structure, such as Company, Cost Center or Account.

Account segment value

A series of characters and a description that define a unique value for a particular value set.

account site

A party site that is used within the context of an account, for example, for billing or shipping purposes.

accounting currency

In some financial contexts, a term used to refer to the currency in which accounting data is maintained. In this manual, this currency is called functional currency.

See also: functional currency, page Glossary-21

accounting transaction

A debit or credit to a general ledger account.

Accounting Flexfield

The code you use to identify a general ledger account in an Oracle Financials application. Each Accounting Flexfield segment value corresponds to a summary or rollup account within your chart of accounts.

Accounting Flexfield structure

The account structure you define to fit the specific needs of your organization. You choose the number of segments, as well as the length, name, and order of each segment in your Accounting Flexfield structure.

Accounting Flexfield value set

A group of values and attributes of the values. For example, the value length and value type that you assign to your account segment to identify a particular element of your business, such as Company, Division, Region, or Product.

accrue through date

The date through which you want to accrue revenue for a project. Oracle Projects picks up expenditure items having an expenditure item date on or before this date, and events having a completion date on or before this date, when accruing revenue. An exception to this rule are projects that use cost-to-cost revenue accrual; in this case, the accrue through date used is the PA Date of the expenditure item's cost distribution lines.

accumulation

See: summarization, page Glossary-46

activity

In Oracle Workflow, a unit of work performed during a business process.

activity

In Oracle Receivables, a name that you use to refer to a receivables activity such as a payment, credit memo, or adjustment.

See also: activity attribute, page Glossary-2, function activity, page Glossary-20

activity attribute

A parameter for an Oracle Workflow function activity that controls how the function activity operates. You define an activity attribute by displaying the activity's Attributes properties page in the Activities window of Oracle Workflow Builder. You assign a value to an activity attribute by displaying the activity node's Attribute Values properties page in the Process window.

actual transactions

Recorded project costs. Examples include labor, expense report, usage, burden, and miscellaneous costs.

ad hoc

For the specific purpose, case, or situation at hand and for no other. For example, an ad hoc tax code, report submission, or database query.

administrative assignment

Activity on an administrative project such as personal holiday, sick day, or jury duty. Administrative assignments can also represent administrative work such as duties on an internal project. Such assignments are charged to the administrative project which is determined by the administration flag on the project type.

advance

An amount of money prepaid in anticipation of receipt of goods, services, obligations or expenditures.

advance

In Oracle Payables, an advance is a prepayment paid to an employee. You can apply an advance to an employee expense report during expense report entry, once you fully pay the advance.

agreement

A contract with a customer that serves as the basis for work authorization. An agreement may represent a legally binding contract, such as a purchase order, or a verbal authorization. An agreement sets the terms of payment for invoices generated against the agreement, and affects whether there are limits to the amount of revenue you can accrue or bill against the agreement. An agreement can fund the work of one or more projects.

agreement type

An implementation-defined classification of agreements. Typical agreement types include purchase order and service agreement.

allocation

A method for distributing existing amounts between and within projects and tasks. The allocation feature uses existing project amounts to generate expenditure items for specified projects.

allocation method

An attribute of an allocation rule that specifies how the rule collects and allocates the amounts in the source pool. There are two allocation methods, full allocation and incremental allocation.

See also: full allocation, page Glossary-20, incremental allocation, page Glossary-23

allocation rule

A set of attributes that describes how you want to allocate amounts in a source pool to specified target projects and tasks.

See also: source pool, page Glossary-45

allocation run

The results of the PRC: Generate Allocation Transactions process.

alternative region

An alternative region is one of a collection of regions that occupy the same space in a window where only one region can be displayed at any time. You identify an alternative region by a poplist icon that displays the region title, which sits on top of a horizontal

line that spans the region. This display method has been replaced by tabs in Release 11i and higher.

amount class

The starting point for a time interval. Available options include period-to-date, year-to-date, and project-to-date. Used to define budgetary controls for a project.

analysis workbook

An authorization by a legislative body that permits a government to incur obligations and make payments for specified purposes. An appropriation usually follows enactment of authorizing legislation. Appropriations are limitations on the amounts agencies can obligate during the time specified in the appropriation act.

approved date

The date on which an invoice is approved.

archive

To store historical transaction data outside your database.

asset

An object of value owned by a corporation or business. Assets are entered in Oracle Projects as non-labor resources.

See also: non-labor resource, page Glossary-31, fixed asset, page Glossary-19

assignment forecast item

Assignment Forecast Item is the smallest unit of forecasting information for the assignment. In this entity, the smallest time unit is a day. Forecast items are created for each day of every provisional and confirmed assignment for every billable resource.

attribute

See: activity attribute, item type attribute., page Glossary-2

attribute

In TCA, corresponds to a column in a TCA registry table, and the attribute value is the value that is stored in the column. For example, party name is an attribute and the actual values of party names are stored in a column in the HZ_PARTIES table.

AutoAccounting

In Oracle Projects, a feature that automatically determines the account coding for an accounting transaction based on the project, task, employee, and expenditure information.

AutoAccounting

In Oracle Receivables, a feature that lets you determine how the Accounting Flexfields for your revenue, receivable, freight, tax, unbilled receivable and unearned revenue account types are created.

AutoAccounting function

A group of related AutoAccounting transactions. There is at least one AutoAccounting function for each Oracle Projects process that uses AutoAccounting. AutoAccounting functions are predefined by Oracle Projects.

AutoAccounting Lookup Set

An implementation-defined list of intermediate values and corresponding Accounting Flexfield segment values. AutoAccounting lookup sets are used to translate intermediate values such as organization names into account codes.

AutoAccounting parameter

A variable that is passed into AutoAccounting. AutoAccounting parameters are used by AutoAccounting to determine account codings. Example AutoAccounting parameters available for an expenditure item are the expenditure type and project organization. AutoAccounting parameters are predefined by Oracle Projects.

AutoAccounting Rule

An implementation-defined formula for deriving Accounting Flexfield segment values. AutoAccounting rules may use a combination of AutoAccounting parameters, AutoAccounting lookup sets, SQL statements, and constants to determine segment values.

AutoAccounting Transaction

A repository of the account coding rules needed to create one accounting transaction. For each accounting transaction created by Oracle Projects, the necessary AutoAccounting rules are held in a corresponding AutoAccounting Transaction. AutoAccounting transactions are predefined by Oracle Projects.

autoallocation set

A group of allocation rules that you can run in sequence that you specify (step-down allocations) or at the same time (parallel allocations).

See also: step-down allocation, page Glossary-46, parallel allocation, page Glossary-33

AutoInvoice

A program that imports invoices, credit memos, and on-account credits from other systems to Oracle Receivables.

automatic event

An event with an event type classification of Automatic. Billing extensions create automatic events to account for the revenue and invoice amounts calculated by the billing extensions.

AutoReduction

An Oracle Applications feature in the list window that allows you to shorten a list so that you must scan only a subset of values before choosing a final value. Just as AutoReduction incrementally reduces a list of values as you enter additional character(s), pressing [Backspace] incrementally expands a list.

AutoSelection

A feature in the list window that allows you to choose a valid value from the list with a single keystroke. When you display the list window, you can type the first character of

the choice you want in the window. If only one choice begins with the character you enter, AutoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

AutoSkip

A feature specific to flexfields where Oracle Applications automatically moves your cursor to the next segment as soon as you enter a valid value into a current flexfield segment. You can turn this feature on or off with the user profile option Flexfields:AutoSkip.

availability

Availability of a resource for a specified duration is presented in the form of a percentage calculated as follows:

(capacity minus the number of confirmed assignments hours)100 / capacity

availability match

See: availability

balancing segment

An Accounting Flexfield segment that you define so that General Ledger automatically balances all journal entries for each value of this segment. For example, if your company segment is a balancing segment, General Ledger ensures that, within every journal entry, the total debits to company 01 equal the total credits to company 01.

baseline

To approve a budget for use in reporting and accounting.

baseline budget

The authorized budget for a project or task which is used for performance reporting and revenue calculation.

basis method

How an allocation rule is used to allocate the amounts from a source pool to target projects. The basis methods include options to spread the amounts evenly, allocate by percentage, or prorate amounts based on criteria you specify. Also referred to as the basis.

batch source

A source you define in Oracle Receivables to identify where your invoicing activity originates. The batch source also controls invoice defaults and invoice numbering. Also known as a transaction batch source.

bill rate

A rate per unit at which an item accrues revenue and/or is invoiced for time and material projects. Employees, jobs, expenditure types, and non-labor resources can have bill rates.

bill rate schedule

A set of standard bill rates that maintains the rates and percentage markups over cost that you charge clients for your labor and non-labor expenditures.

bill site

The customer address to which project invoices are sent.

bill through date

The date through which you want to invoice a project. Oracle Projects picks up revenue distributed expenditure items having an expenditure item date on or before this date, and events having a completion date on or before this date, when generating an invoice.

billable resource

A resource that has a current billable job assignment. Billable jobs are defined in the job definition screen where the Job Billability flag is set to Y.

billing

The functions of revenue accrual and invoicing.

billing cycle

The billing period for a project. Examples of billing cycles you can define are: a set number of days, the same day each week or month, or the project completion date. You can optionally use a client extension to define a billing cycle.

billing title

See: employee billing title, page Glossary-16

billing title

See: job billing title, page Glossary-26

block

Every Oracle Applications window (except root and modal windows) consists of one or more blocks. A block contains information pertaining to a specific business entity Generally, the first or only block in a window assumes the name of the window. Otherwise, a block name appears across the top of the block with a horizontal line marking the beginning of the block.

borrowed and lent

A method of processing cross charge transactions that generates accounting entries to pass cost or share revenue between the provider and receiver organizations within a legal entity.

See also: Intercompany Billing, page Glossary-23

boundary code

The end point for a time interval. Available options include period, year, and project. Used to define budgetary controls for a project.

budget

Estimated cost, revenue, labor hours or other quantities for a project or task. Each budget may optionally be categorized by resource. Different budget types may be set up to classify budgets for different purposes. In addition, different versions can exist for each user-defined budget type: current, original, revised original, and historical versions. The current version of a budget is the most recently baseline version.

See also: budget line, page Glossary-8, resource, page Glossary-41

budgetary controls

Control settings that enable the system to monitor and control project-related commitment transactions.

budget line

Estimated cost, revenue, labor hours, or other quantity for a project or task categorized by a resource.

burden cost code

An implementation-defined classification of overhead costs. A burden cost code represents the type of burden cost you want to apply to raw cost. For example, you can define a burden cost code of G&A to burden specific types of raw costs with General and Administrative overhead costs.

burden costs

Burden costs are legitimate costs of doing business that support raw costs and cannot be directly attributed to work performed. Examples of burden costs are fringe benefits, office space, and general and administrative costs.

burden multiplier

A numeric multiplier associated with an organization for burden schedule revisions, or with burden cost codes for projects or tasks. This multiplier is applied to raw cost to calculate burden cost amounts. For example, you can assign a multiplier of 95% to the burden cost code of Overhead.

burden schedule

An implementation-defined set of burden multipliers that is maintained for use across projects. Also referred to as a *standard burden schedule*. You may define one or more schedules for different purposes of costing, revenue accrual, and invoicing. Oracle Projects applies the burden multipliers to the raw cost amount of an expenditure item to derive an amount; this amount may be the total cost, revenue amount, or bill amount. You can override burden schedules by entering negotiated rates at the project and task level.

See also: firm schedule, page Glossary-19, provisional schedule, page Glossary-38, burden schedule revision, page Glossary-8, burden schedule override, page Glossary-8

burden schedule override

A schedule of negotiated burden multipliers for projects and tasks that overrides the schedule you defined during implementation.

burden schedule revision

A revision of a set of burden multipliers. A schedule can be made of many revisions.

burden structure

A burden structure determines how cost bases are grouped and what types of burden costs are applied to the cost bases. A burden structure defines relationships between cost bases and burden cost codes and between cost bases and expenditure types.

burdened cost

The cost of an expenditure item, including raw cost and burden costs.

business entity

A person, place, or thing that is tracked by your business. For example, a business entity can be an account, a customer, or a part.

business group

The highest level of organization and the largest grouping of employees across which a company can report. A business group can correspond to an entire company, or to a specific division within the company.

Each installation of Oracle Projects uses one business group with one hierarchy.

business view

Component of the application database that sorts underlying applications data into an understandable and consolidated set of information. By masking the complexity of the database tables, Business Views provide a standard set of interfaces to any tool or application that retrieves and presents data to the user.

button

You choose a button to initiate a predefined action. Buttons do not store values. A button is usually labeled with text to describe its action or it can be an icon whose image illustrates its action.

calendar

Working capacity defined by work patterns and calendar exceptions.

capacity

Capacity is the total number of hours a resource can be scheduled based on the calendar of the resource. In the case of Labor, capacity is defined in work hours. The capacity of an Organization is the sum total of the capacity of assigned resources.

capital project

A project in which you build one or more depreciable fixed assets.

chart of accounts

The account structure your organization uses to record transactions and maintain account balances.

chart of accounts structure

See: Accounting Flexfield structure, page Glossary-2

check box

You can indicate an on/off or yes/no state for a value by checking or unchecking its check box. One or more check boxes can be checked since each check box is independent of other check boxes.

child request

A concurrent request submitted by another concurrent request (a parent request.) For example, each of the reports and/or programs in a report set are child requests of that report set.

CIP asset

See: construction-in-process (CIP) asset, page Glossary-11

chargeable project

For each expenditure, a project to which the expenditure can be charged or transferred.

claim

A discrepancy between the billed amount and the paid amount. Claims are often referred to as deductions, but a claim can be positive or negative.

class category

An implementation-defined category for classifying projects. For example, if you want to know the market sector to which a project belongs, you can define a class category with a name such as *Market Sector.* Each class category has a set of values (class codes) that can be chosen for a project.

See also: class code, page Glossary-10

class code

An implementation-defined value within a class category that can be used to classify a project.

See also: class category, page Glossary-10

clearing account

An account used to ensure that both sides of an accounting transaction are recorded. For example, Oracle General Ledger uses clearing accounts to balance intercompany transactions.

When you purchase an asset, your Pyables group creates a journal entry to the asset clearing account. When your fixed assets group records the asset, they create an offset journal entry to the asset clearing account to balance the entry from the payables group.

combination block

A combination block displays the fields of a record in both multi-record (summary) and single-record (detail) formats. Each format appears in its own separate window that you can easily navigate between.

combination query

See: Existing Combinations, page Glossary-17

comment alias

A user-defined name for a frequently used line of comment text, which can be used to facilitate online entry of timecards and expense reports.

commitment transactions

Anticipated project costs. Examples include purchase requisitions and purchase orders, provisional and confirmed contract commitments, and supplier invoices.

competence

A technical skill or personal ability such as JAVA programming, customer relations, and project billing.

competence match

A numerical comparison of the competence of a resource to the mandatory and optional competencies of a requirement. In the candidate score calculation, this number is converted to a percentage.

complete matching

A condition where the invoice quantity matches the quantity originally ordered, and you approve the entire quantity.

See also: matching, page Glossary-30, partial matching, page Glossary-33

construction-in-process (CIP) asset

A depreciable fixed asset you plan to build during a capital project. The costs associated with building CIP assets are referred to as CIP costs. You construct CIP assets over a period of time rather than buying a finished asset. Oracle Assets lets you create, maintain, and add to your CIP assets as you spend money for material and labor to construct them. When you finish the assets and place them in service (capitalize them), Oracle Assets begins depreciating them.

See also: capital project, page Glossary-9

concurrent manager

A unique facility that manages many time-consuming, non-interactive tasks within Oracle Applications. When you submit a request that does not require your interaction, such as releasing shipments or running a report, the Concurrent Manager does the work for you, letting you complete multiple tasks simultaneously.

concurrent process

A non-interactive task that you request Oracle Applications to complete. Each time you submit a non-interactive task, you create a new concurrent process. A concurrent process runs simultaneously with other concurrent processes (and other interactive activities on your computer) to help you complete multiple tasks at once.

concurrent queue

A list of concurrent requests awaiting completion by a concurrent manager. Each concurrent manager has a queue of requests waiting to be run. If your system administrator sets up your Oracle Application to have simultaneous queuing, your request can wait to run in more than one queue.

concurrent request

A request to Oracle Applications to complete a non-interactive task for you, such as releasing a shipment, posting a journal entry, or running a report. Once you submit a request, Oracle Applications automatically completes your request.

contact

In Oracle Projects, a customer representative who is involved with a project. For example, a contact can be a billing contact, the customer representative who receives project invoices.

contact point

A means of contacting a party other than postal mail, for example, a phone number, e-mail address, fax number, and so on.

contact type

An implementation-defined classification of project contacts according to their role in the project. Typical contact types are Billing and Shipping.

context field prompt

A question or prompt to which a user enters a response, called a context field value. When Oracle Applications displays a descriptive flexfield popup window, it displays your context field prompt after it displays any global segments you have defined. Each descriptive flexfield can have up to one context prompt.

context field value

A response to your context field prompt. Your response is composed of a series of characters and a description. The response and description together provide a unique value for your context prompt, such as 1500, Journal Batch ID, or 2000, Budget Formula Batch ID. The context field value determines which additional descriptive flexfield segments appear.

context response

See: context field value, page Glossary-12

context segment value

A response to your context-sensitive segment. The response is composed of a series of characters and a description. The response and description together provide a unique value for your context-sensitive segment, such as Redwood Shores, Oracle Headquarters, or Minneapolis, Merrill Aviation's Hub.

context-sensitive segment

A descriptive flexfield segment that appears in a second pop-up window when you enter a response to your context field prompt. For each context response, you can define multiple context segments, and you control the sequence of the context segments in the second pop-up window. Each context-sensitive segment typically prompts you for one item of information related to your context response.

contingent worker

A non-employee people resource who works for your enterprise, and for whom your enterprise is responsible for their costs and expenses. Contingent workers are frequently referred to as contract employees and temporary labor.

contract employee

See: contingent worker, page Glossary-12

contract project

A project for which you can generate revenue and invoices. Typical contract project types include Time and Materials and Fixed Price. Formerly known as a *direct project*.

control level

The level of control to impose on project transactions during a funds check. Available options are absolute, advisory, and none. Used to define budgetary controls for a project.

controlled budget

A budget for which budgetary controls have been enabled.

conversion

A process that converts foreign currency transactions to your functional currency.

See also: foreign currency conversion., page Glossary-20

corporate exchange rate

An exchange rate you can optionally use to perform foreign currency conversion. The corporate exchange rate is usually a standard market rate determined by senior financial management for use throughout the organization. You define this rate in Oracle General Ledger.

cost base

A cost base refers to the grouping of raw costs to which burden costs are applied. Examples of cost bases are Labor and Materials.

cost budget

The estimated cost amounts at completion of a project. Cost budget amounts can be summary or detail, and can be burdened or unburdened.

cost burden schedule

A burden schedule used for costing to derive the total cost amount. You assign the cost burden schedule to a project type that is burdened; this default cost burden schedule defaults to projects that use the project type; and then from the project to the tasks below the project. You may override the cost burden schedule for a project or a task if you have defined the project type option to allow overrides of the cost burden schedule.

cost distribution

The act of calculating the cost and determining the cost accounting for an expenditure item.

cost rate

The monetary cost per unit of an employee, expenditure type, or resource.

cost-to-cost

A revenue accrual method that calculates project revenue as budgeted revenue multiplied by the ratio of actual cost to budgeted cost. Also known as *percentage of completion method or percentage spent method*.

credit memo

In Oracle Payables and Oracle Projects, a document that partially or fully reverses an original invoice.

In Oracle Receivables, a document that partially or fully reverses an original invoice. You can create credit memos in the Receivables Credit Transactions window or with AutoInvoice.

Cross Business Group Access (CBGA)

The ability to view data in operating units that are not associated with the current operating unit's business group.

Cross Business Group Access mode (CBGA mode)

An installation that has selected CBGA in the profile options is operating in *CBGA mode.*

cross charge

To charge a resource to a project owned by a different operating unit.

credit receiver

A person receiving credit for project or task revenue. One project or task may have many credit receivers for one or many credit types.

credit type

An implementation-defined classification of the credit received by a person for revenue a project earns. Typical credit types include Quota Credit and Marketing Credit.

Cross-Project responsibility

A responsibility that permits users to view and update any project.

cross charge transactio

An expenditure item whose provider operating unit is different from the receiver operating unit, the provider organization is different from the receiver organization, or both.

cross charge project

A project that can receive transactions from an operating unit or organization that is different from the operating unit or organization that owns the project.

cross charge type

One of the three types of cross charge transactions: intercompany, inter-operating unit, and intra-operating unit.

cross-project user

A user who is logged into Oracle Projects using a Cross-Project responsibility.

current budget

The most recently baseline budget version of the budget.

current record indicator

Multi-record blocks often display a current record indicator to the left of each record. A current record indicator is a one character field that when filled in, identifies a record as being currently selected.

customer agreement

See: agreement, page Glossary-3

database table

A basic data storage structure in a relational database management system. A table consists of one or more units of information (rows), each of which contains the same kind of values (columns). Your application's programs and windows access the information in the tables for you.

deferred revenue

An event type classification that generates an invoice for the amount of the event, and has no immediate effect on revenue. The invoice amount is accounted for in an unearned revenue account that will be offset as the project accrues revenue.

delivery assignment

Filled work position on a project that is not an administrative project.

denomination currency

In some financial contexts, a term used to refer to the currency in which a transaction takes place. In this manual, this currency is called transaction currency.

See also: transaction currency, page Glossary-48

depreciate

To depreciate an asset is to spread its cost over the time you use it. You charge depreciation expense for the asset each period. The total depreciation taken for an asset is stored in the accumulated depreciation account.

Descriptive Flexfield

A field that your organization can extend to capture extra information not otherwise tracked by Oracle Applications. A descriptive flexfield appears in your window as a single character, unnamed field. Your organization can customize this field to capture additional information unique to your business.

direct project

See: contract project, page Glossary-12

dimension

An Oracle Financial Analyzer database object used to organize and index the data stored in a variable. Dimensions are used in Oracle Project to calculate and monitor performance measures. Dimensions answer the following questions about data: "What?" "When?" and "Where?" For example, a variable called Units Sold might be associated with the dimensions Product, Month, and District. In this case, Units Sold describes the number of products sold during specific months within specific districts.

discount rate

The minimum acceptable rate of return on an investment. Can also be described as the expected return for an investment of comparable risk. Also called required rate of return, hurdle rate, or opportunity cost of capital. You can specify annual discount rate to be used for calculating net present value and payback period for each portfolio planning cycle and scenario.

distribution line

In Oracle Payables and Oracle Projects, a line corresponding to an accounting transaction for an expenditure item on an invoice, or a liability on a payment.

distribution line

In Oracle Assets, information such as employee, general ledger depreciation expense account, and location to which you have assigned an asset. You can create any number of distribution lines for each asset. Oracle Assets uses distribution lines to allocate depreciation expense and to produce your Property Tax and Responsibility Reports.

distribution rule

See: revenue distribution rule, page Glossary-42

draft budget

A preliminary budget which may be changed without affecting revenue accrual on a project.

draft invoice

A potential project invoice that is created, adjusted, and stored in Oracle Projects. Draft invoices require approval before they are officially accounted for in other Oracle Applications.

draft revenue

A project revenue transaction that is created, adjusted, and stored in Oracle Projects. You can adjust draft revenue before you transfer it to other Oracle Applications.

drilldown

A software feature that allows you to view the details of an item in the current window via a window in a different application.

duration

The total number of days between the start date and end date of a team role.

dynamic insertion

An optional Accounting Flexfields feature that allows you to create new account combinations during data entry in Oracle Applications. By enabling this feature, it prevents having to define every possible account combination that can exist. Define cross-validation rules when using this feature.

effort

The total number of hours of a team role.

employee billing title

An employee title, which differs from a job billing title, that may appear on an invoice. Each employee can have a unique employee billing title.

employee organization

The organization to which an employee is assigned.

encumbrance

A journal entry to reserve funds for anticipated project costs (commitments). The primary purpose for posting encumbrances is to avoid overspending a budget.

End User Layer

Component of Discoverer that translates business view column names into industry standard terminology and provides links between related data tables. Discoverer accesses information through the End User Layer (EUL).

estimate to complete

The expected additional cost to complete a project.

In the forecast generation process, estimate to complete is calculated by multiple methods, including: remaining plan, plan to complete, and earned value.

In Oracle Project Portfolio Planning, estimate to complete is used to evaluate and select projects into a portfolio. It is the sum of costs that occur between the Funding Period From and Effective Period To dates.

euro

A single currency adopted by the member states of the European Union. The official abbreviation, EUR, is used for all commercial, business, and financial purposes, and has been registered with the International Standards Organization (ISO).

event

In Oracle Projects, a summary level transaction assigned to a project or top task that records work completed and generates revenue and/or billing activity, but is not directly related to any expenditure items. For example, unlike labor costs or other billable expenses, a bonus your business receives for completing a project ahead of schedule is not attributable to any expenditure item, and would be entered as an event.

event type

An implementation-defined classification of events that determines the revenue and invoice effect of an event. Typical event types include Milestones, Scheduled Payments, and Write-Offs.

exchange rate

A rate that represents the amount one currency can be exchanged for another at a specific point in time. Oracle Applications can access daily, periodic, and historical rates. These rates are used for foreign currency conversion, revaluation, and translation.

exchange rate type

The source of an exchange rate. For example, user defined, spot, or corporate rate.

See also: corporate exchange rate, page Glossary-13, spot exchange rate, page Glossary-45

Existing Combinations

A feature specific to key flexfields in data entry mode that allows you to enter query criteria in the flexfield to bring up a list of matching predefined combinations of segment values to select from.

expenditure

A group of expenditure items incurred by an employee or an organization for an expenditure period. Typical expenditures include Timecards and Expense Reports.

expenditure (week) ending date

The last day of an expenditure week period. All expenditure items associated with an expenditure must be on or before the expenditure ending date, and must fall within the expenditure week identified by the expenditure week ending date.

expenditure category

An implementation- defined grouping of expenditure types by type of cost. For example, an expenditure category with a name such as *Labor* refers to the cost of labor.

expenditure comment

Free text that can be entered for any expenditure item to explain or describe it in further detail.

expenditure cost rate

The monetary cost per unit of a non-labor expenditure type.

expenditure cycle

A weekly period for grouping and entering expenditures.

expenditure group

A user-defined name used to track a group of pre-approved expenditures, such as Timecards, or Expense Reports.

expenditure item

The smallest logical unit of expenditure you can charge to a project and task. For example, an expenditure item can be a timecard item or an expense report item.

expenditure item date

The date on which work is performed and is charged to a project and task.

expenditure operating unit

The operating unit in which an expenditure is entered and processed for project costing.

expenditure organization

For timecards and expense reports, the organization to which the incurring employee is assigned, unless overridden by organization overrides. For usage, supplier invoices, and purchasing commitments, the incurring organization entered on the expenditure.

expenditure type

An implementation-defined classification of cost that you assign to each expenditure item. Expenditure types are grouped into cost groups (expenditure categories) and revenue groups (revenue categories).

expenditure type class

An additional classification for expenditure types that indicates how Oracle Projects processes the expenditure types. For example, if you run the Distribute Labor Costs process, Oracle Projects will calculate the cost of all expenditure items assigned to the Straight Time expenditure type class. Formerly known as *system linkage*.

expense report

In Oracle Payables, a document that details expenses incurred by an employee for the purpose of reimbursement. You can enter expense reports online in Payables, or employees enter them online in Internet Expenses. You can then submit Expense Report Import to import these expense reports and expense reports from Projects. The import program creates invoices in Payables from the expense report data.

expense report

In Oracle Projects, a document that, for purposes of reimbursement, details expenses incurred by an employee. You can set up expense report templates to match the format of your expense reports to speed data entry. You must create invoices from Payables expense reports using Expense Report Import before you can pay the expense reports.

Expense Report Import

An Oracle Payables process you use to create invoices from Payables expense reports. You can also use Expense Report Import to create invoices from expense reports in Oracle Projects.

When you initiate Expense Report Import, Payables imports the expense report information and automatically creates invoices with invoice distribution lines from the information. Payables also produces a report for all expense reports it could not import.

external organization

See: organization, page Glossary-32

feeder program

A custom program you write to transfer your transaction information from an original system into Oracle Application interface tables. The type of feeder program you write depends on the environment from which you are importing data.

field

A position on a window that you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field, or alternatively, what kind of information you should enter in the field.

financial percentile

The percentile rank of the investment on the financial metric. This value is calculated by (1) ranking the projects, highest to lowest, by net present value (NPV), then (2) performing this calculation: percentile = (((A-B)/A)* 100), where A represents the total number of projects and B represents the project ranking.

firm schedule

A burden schedule of burden multipliers that will not change over time. This is compared to provisional schedules in which actual multipliers are mapped to provisional multipliers after an audit.

first bill offset days

The number of days that elapse between a project start date and the date that the project's first invoice is issued.

fixed asset

An item owned by your business and used for operations. Fixed assets generally have a life of more than one year, are acquired for use in the operation of the business, and are not intended for resale to customers. Assets differ from inventory items since you use them rather than sell them.

fixed date

See: schedule fixed date, page Glossary-44

flat file

A file whose data is not formatted for a specific application.

flexfield

An Oracle Applications field made up of segments. Each segment has an assigned name and a set of valid values. Oracle Applications uses flexfields to capture information about your organization. There are two types of flexfields: key flexfields and descriptive flexfields.

flexfield segment

One of the sections of your key flexfield, separated from the other sections by a symbol that you define (such as -,/, or \). Each segment typically represents an element of your business, such as cost center, product, or account.

folder

A customizable window located in Oracle Applications. Folders allow you to: change the display of a window by resizing or reordering columns, hide or display columns, and change field names to best fit the needs of each user's working style.

foreign currency

In Oracle Applications, a currency that is different from the functional currency you defined for your set of books in Oracle General Ledger. When you enter and pay a foreign currency invoice, Payables automatically converts the foreign currency into your functional currency at the rate you define. General Ledger automatically converts foreign currency journal entries into your functional currency at the rate you define.

See also: exchange rate, page Glossary-17, functional currency, page Glossary-21

foreign currency conversion

A process in Oracle Applications that converts a foreign currency transaction into your functional currency using and exchange rate you specify.

form

A window that contains a logical collection of fields, regions, and blocks that appear on a single screen. You enter data into forms.

See also: window, page Glossary-51

full allocation

An allocation method that distributes all the amounts in the specified projects in the specified amount class. The full allocation method is generally suitable if you want to process an allocation rule only once in a run period.

See also: incremental allocation, page Glossary-23

function

A PL/SQL stored procedure referenced by an Oracle Workflow function activity that can enforce business rules, perform automated tasks within an application, or retrieve application information. The stored procedure accepts standard arguments and returns a completion result.

See also: function activity, page Glossary-20

function activity

An automated Oracle Workflow unit of work that is defined by a PL/SQL stored procedure.

function security

An Oracle Applications feature that lets you control user access to certain functions and windows. By default, access to functionality is *not* restricted; your system administrator customizes each responsibility at your site by including or excluding functions and menus in the Responsibilities window.

functional currency

The principal currency you use to record transactions and maintain accounting data for your set of books.

In cross charge transactions, the functional currency, as defined in the set of books, is the currency associated with a project transaction. For example, the cost functional currency is the functional currency for both the project expenditure item and the set of books of the expenditure operating unit.

For project summary reporting, the functional currency is the currency in which project amounts are summarized.

The invoice functional currency is the functional currency for both the project revenue and the set of books of the project operating unit.

funding

In Oracle Project Portfolio Planning, the process of allocating available funds to projects for the specified funding periods. The purpose of the funding process is to identify projects that can be executed using available funds. Funding in Oracle Project Portfolio Planning considers only the costs that will occur during the funding periods, and does consider revenue amounts. Oracle Project Portfolio Planning does not require that the funds allocated be within the baseline budget amount, and does not do a funds check.

funding periods

In Oracle Project Portfolio Planning, the range of periods during which funds available and funds required are considered. The funding periods are configured on a planning cycle, with the parameters Funding Period From and Funding Period To. For projects that run beyond the funding periods, only costs that are scheduled to occur within the funding periods are considered when calculating Funds Required.

funding variance

Net funds needed to spend for a specified duration. Funding variance represent the pool of money required minus available funds within the funding periods for a portfolio plan. The system recalculates funding variance for a scenario as well as for each investment class code in the scenario, based on the set of projects that have been recommended.

Funding variance is a tool for scenario development. If the funding variance is a positive amount, funds are overspent (the approved projects require more funds than the amounts available). If the funding variance is negative, then there are available funds to spend.

funds allocated

A system-defined indicator that shows if there is money available from the pool to allocate to all projects in a scenario. Users can specify any metric as a parameter to rank the projects for allocations of funds. Funds allocated is determined by (1) ranking all approved projects, highest to lowest, by the metric specified, then (2) performing

funds allocation from the pool of money available by the funds required, in the order of the project ranking.

funds available

Funds available to spend for a specified duration for a portfolio plan. You enter funds available for the portfolio plan and the percentage of funds available for each investment class code. You can adjust and compare funds available for each scenario in the plan. Funds available is used calculate funds allocated.

funds check

A fiscal and accounting entity with a self-balancing set of accounts in which cash and other financial resources, all related liabilities and residual equities or balances and changes to these balances are recorded. A fund is segregated to carry on specific activities or attain certain objectives in accordance with special regulations, restrictions, or limitations. When you implement Oracle Public Sector Financials, Fund is typically the balancing segment of your Accounting Flexfield.

funds required

Funds needed for a specified duration. Funds required represents the pool of money needed within the funding periods for a portfolio plan. Funds required for a project is calculated as the sum of project cost scheduled within the funding periods. Funds required does not include cost outside the funding periods. The system recalculates funds required for a scenario as well as each investment class code in the scenario, based on the set of projects that have been recommended.

GL Date

The date, referenced from Oracle General Ledger, used to determine the correct accounting period for your transactions. In Oracle Projects, the end date of the GL Period in which costs or revenue are transferred to Oracle General Ledger. This date is determined from the open or future GL Period on or after the Project Accounting Date of a cost distribution line or revenue. For invoices, the date within the GL Period on which an invoice is transferred to Oracle Receivables.

global hierarchy

An organization hierarchy that includes one or more business groups. A global hierarchy can be used by installations that are in CBGA mode.

global security profile

An HR security profiles that is not associated with a business group. A global security profile can secure organizations and people throughout a global (cross business group) organization hierarchy.

global segment prompt

A non-context-sensitive descriptive flexfield segment. Each global segment typically prompts you for one item of information related to the zone or form in which you are working.

global segment value

A response to your global segment prompt. Your response is composed of a series of characters and a description. The response and description together provide a unique value for your global segment, such as J. Smith, Financial Analyst, or 210, Building C.

hard limit

An option for an agreement that prevents revenue accrual and invoice generation beyond the amount allocated to a project or task by the agreement. If you do not impose a hard limit, Oracle Projects automatically imposes a soft limit of the same amount.

See also: soft limit, page Glossary-44

HR job

In HRMS, the HR job for a resource (person) is the job linked to the primary assignment of the person.

incremental allocation

An allocation method that creates expenditure items based on the difference between the transactions processed from one allocation to the next. This method is generally suitable if you want to use an allocation rule in allocation runs several times in a given run period.

See also: full allocation, page Glossary-20

indirect project

A project used to collect and track costs for overhead activities, such as administrative labor, marketing, and bid and proposal preparation. You can also define indirect projects to track time off such as sick leave, vacation, and holidays. You cannot generate revenue or invoices for indirect projects.

inter-operating unit cross charge transaction

An expenditure item for which the provider and receiver operating units are different, but both operating units are associated with the same legal entity.

intercompany billing

A method of internally billing work performed by a provider operating unit and charged to a project owned by a receiver operating unit. The provider operating unit creates a Receivables invoice, which is interfaced as a Payables invoice to the receiver operating unit. See: *Borrowed and Lent*.

intercompany billing project

A contract project set up in the provider operating unit to process intercompany billing. The provider operating unit must create one intercompany billing project for each receiver operating unit it wants to charge.

intercompany cross charge transaction

An expenditure item that crosses legal entity boundaries, which means that the provider and receiver operating units are different and are associated with different legal entities.

intercompany invoice base amount

The sum of the amounts in the provider's transfer price functional currency.

intercompany invoice currency

The transaction currency of an intercompany invoice. You can specify the invoice currency attributes for each intercompany billing project to convert the intercompany invoice base amount to the intercompany invoice amount

intermediate value

The parameter value, constant, or SQL statement result that is determined during the first step in the execution of an AutoAccounting rule.

internal billing

Intercompany billing for work performed between two organizations or projects. The process creates the appropriate documents so the provider operating unit can bill the receiver operating unit.

internal organization

See: organization, page Glossary-32

internal rate of return

The discount rate at which the present value of future revenues of a project, investment class code, or scenario is equal to the present value of future costs of that project, investment class code, or scenario. The net present value of the project, investment code, or scenario would be zero, using the internal rate of return as the discount rate.

internal requisition

See: internal sales order, page Glossary-24, purchase requisition, page Glossary-39

internal sales order

A request within your company for goods or services. An internal sales order originates from an employee or from another process as a requisition, such as inventory or manufacturing, and becomes an internal sales order when the information is transferred from Purchasing to Order Management. Also known as *internal requisition* or *purchase requisition.*

intra-operating unit cross charge transaction

An cross charge expenditure item charged entirely within an operating unit. The provider and receiver organizations are different, but the provider and receiver operating units are the same.

investment class category

A class category used to analyze and balance the distribution of cost and benefit for a scenario among the class codes for that category. A project must have a class code value for the investment class category in order to be collected into a planning cycle. The aggregate net present value, return on investment, internal rate of return, and payback period are calculated for each investment class code.

investment class code

A class code defined in the investment class category.

investment index

The overall percentile rank of the project investment. This value is calculated using the following formula: (% strategic weight)*(strategic percentile) + (% financial weight)*(financial percentile).

investment mix

The funds allocated to a project portfolio, shown by percentage allocated to each investment class code.

invoice

In Oracle Projects, a summarized list of charges, including payment terms, invoice item information, and other information that is sent to a customer for payment.

In Oracle Receivables and Oracle Cash Management, a document that you create in Receivables that lists amounts owed for the purchases of goods or services. This document also lists any tax, freight charges, and payment terms.

In Oracle Payables and Oracle Assets, a document you receive from a supplier that lists amounts owed to the supplier for purchased goods or services. In Payables, you create an invoice online using the information your supplier provides on the document, or you import an invoice from a supplier. Payments, inquiries, adjustments and any other transactions relating to a supplier's invoice are based upon the invoice information you enter.

invoice burden schedule

A burden schedule used for invoicing to derive the bill amount of an expenditure item. This schedule may be different from your revenue burden schedule, if you want to invoice at a different rate at which you want to accrue.

invoice currency

The currency in which an Oracle Projects invoice is issued.

invoice date

In Oracle Assets and Oracle Projects, the date that appears on a customer invoice. This date is used to calculate the invoice due date, according to the customer's payment terms.

In Oracle Receivables, the date an invoice is created. This is also the date that Receivables prints on each invoice. Receivables also uses this date to determine the payment due date based on the payment terms you specify on the invoice.

In Oracle Payables, the date you assign to an invoice you enter in Payables. Payables uses this date to calculate the invoice due date, according to the payment terms for the invoice. The invoice date can be the date the invoice was entered or it can be a different date you specify.

invoice distribution line

A line representing an expenditure item on an invoice. A single expenditure item may have multiple distribution lines for cost and revenue. An invoice distribution line holds an amount, account code, and accounting date.

invoice format

The columns, text, and layout of invoice lines on an invoice.

invoice item

A single line of a project's draft invoice, formatted according to the project invoice formats.

invoice set

For each given run of invoice generation for a project, if multiple agreements exist and multiple invoices are created, Oracle Projects creates the invoices within a unique set ID. You approve, release, and cancel all invoices within an invoice set.

invoice transaction type

An Oracle Receivables transaction type that is assigned to invoices and credit memos that are created from Oracle Projects draft invoices.

invoice write-off

A transaction that reduces the amount outstanding on an invoice by a given amount and credits a bad debt account.

See also: revenue write-off, page Glossary-43

invoicing

The function of preparing a client invoice. Invoice generation refers to the function of creating the invoice. Invoicing is broader in the terms of creating, adjusting, and approving an invoice.

item type

A term used by Oracle Workflow to refer to a grouping of all items of a particular category that share the same set of item attributes, used as a high level grouping for processes. For example, each Account Generator item type (e.g. FA Account Generator) contains a group of processes for determining how an Accounting Flexfield code combination is created.

See also: item type attribute, page Glossary-26

item type attribute

A feature of a particular Oracle Workflow item type, also known as an item attribute. An item type attribute is defined as a variable whose value can be looked up and set by the application that maintains the item. An item type attribute and its value is available to all activities in a process.

item validation organization

The organization that contains your master list of items.

You must define all items and bills in your Item Validation Organization, but you also need to maintain your items and bills in separate organizations if you want to ship them from other warehouses. Oracle Order Management refers to organizations as warehouses on all Order Management forms and reports.

See also: organization, page Glossary-32

job

A name for a set of duties to which an employee may be assigned. You create jobs in Oracle Projects by combining a job level and a job discipline using your job key flexfield structure. For example, you can combine the job level *Staff* with the job discipline *Engineer* to create the job *Staff Engineer*.

job billing title

A job billing title, which differs from a job title, that may appear on an invoice.

job discipline

A categorization of job vocation, used with Job Level to create a job title. For example, a job discipline may be Engineer, or Consultant.

job group

A collection of jobs defined for a specific purpose. Jobs in a job group have the same key flexfield structure.

job level

A categorization of job rank, used with *job discipline* to create a job title. For example, a job level may be Staff, or Principal.

In Oracle Project Resource Management, a numeric value associated to the job of the Project Resource Job Group. Each resource has a job and an associated job level that either belongs to or is mapped to the Project Resource Job Group. The level provides a basis for searching for potential resource matches. See *job level match.*

job level match

A numeric value of 0% or 100%. If the job level of the resource is within the range of specified job levels for the search, then the job level match for the resource is 100, otherwise, it is 0. This percentage is used by the calculation for determining the candidate score.

job title

In Oracle Projects, a unique combination of job level and job discipline that identifies a particular job.

In Oracle Receivables, a brief description of your customer contact's role within their organization.

journal entry category

A category to indicate the purpose or nature of a journal entry, such as Adjustment or Addition. Oracle General Ledger associates each of your journal entry headers with a journal category. You can use one of General Ledger's predefined journal categories or define your own.

For Oracle Payables, there are three journal entry categories in Oracle Projects if you use the accrual basis accounting method: Invoices, Payments, and All (both Invoices and Payments). If you use the cash basis accounting method, Oracle Projects only assigns the Payment journal entry category to your journal entries.

journal entry header

A method used to group journal entries by currency and journal entry category within a journal entry batch. When you initiate the transfer of invoices or payments to your general ledger for posting, Oracle Payables transfers the necessary information to create journal entry headers for the information you transfer. Journal Import in General Ledger uses the information to create a journal entry header for each currency and journal entry category in a journal entry batch. A journal entry batch can have multiple journal entry headers.

journal entry lines

Each journal entry header contains one or more journal entry lines. The lines are the actual journal entries that your general ledger posts to update account

balances. The number and type of lines in a journal entry header depend on the volume of transactions, frequency of transfer from Oracle Payables, and your method of summarizing journal entries from Oracle Payables.

journal entry source

Identifies the origin of journal entries from Oracle and non-Oracle feeder systems. General Ledger supplies predefined journal sources or you can create your own.

Journal Import

A General Ledger program that creates journal entries from transaction data stored in the General Ledger GL_INTERFACE table. Journal entries are created and stored in GL_JE_BATCHES, GL_JE_HEADERS, and GL_JE_LINES.

key flexfield

An intelligent key that uniquely identifies an application entity. Each key flexfield segment has a name you assign, and a set of valid values you specify. Each value has a meaning you also specify. You use this Oracle Applications feature to build custom fields used for entering and displaying information relating to your business. Oracle Projects uses the following Key Flexfields: Accounting, Category Flexfield, Location, and Asset Key.

key flexfield segment

One of up to 30 different sections of your key flexfield. You separate segments from each other by a symbol you choose (such as -, / or \.). Each segment can be up to 25 characters long. Each key flexfield segment typically captures one element of your business or operations structure, such as company, division, region, or product for the Accounting Flexfield and item, version number, or color code for the Item Flexfield.

key flexfield segment value

A series of characters and a description that provide a unique value for this element, such as 0100, Eastern region, or V20, Version 2.0.

key member

An employee who is assigned a role on a project. A project key member can view and update project information and expenditure details for any project to which they are assigned. Typical key member types include Project Manager and Project Coordinator.

labor cost

The cost of labor expenditure items.

labor cost rate

The hourly raw cost rate for an employee. This cost rate does not include overhead or premium costs.

labor costing rule

An implementation-defined name for an employee costing method. Also known as pay type. Typical labor costing rules include *Hourly* and *Exempt*.

labor invoice burden schedule

A burden schedule used to derive invoice amounts for labor items.

labor multiplier

A multiplier that is assigned to a project or task, and is used to calculate the revenue and/or bill amount for labor items by applying the multiplier to the raw cost of the labor items.

labor revenue burden schedule

A burden schedule used to derive revenue amounts for labor items.

legal entity

An organization that represents a legal company for which you prepare fiscal or tax reports. You assign tax identifiers and other relevant information to this entity.

lifecycle

A collection of sequential project phases.

liquidation

The process of relieving an encumbrance.

listing

An organized display of Oracle Applications information, similar to a report, but usually showing setup data as opposed to transaction data.

Logical Data Model

A representation of the End User Layer. Available in a readable format, the Logical Data Model gives the relationship between folders, allowing a Discoverer user to determine the data elements needed for a specific analysis.

lookup code

The internal name of a value defined in an Oracle Workflow lookup type.

See also: lookup type, page Glossary-29

lookup type

An Oracle Workflow predefined list of values. Each value in a lookup type has an internal and a display name.

See also: lookup code, page Glossary-29

lowest task

A task that has no child tasks.

master-detail relationship

An association between two blocks-a master block and its detail block. When two blocks are linked by a master-detail relationship, the detail block displays only those records that are associated with the current (master) record in the master block, and querying between the two blocks is always coordinated. Master and detail blocks can often appear in the same window or they can each appear in separate windows.

master job

A job in a master job group.

master job group

The job group that is used as an intermediate mapping group between other job groups.

match rule

A set of rules that determines which records are matches for an input record. A match rule consists of an acquisition portion to determine potential matches, a scoring portion to score the potential matches, and thresholds that the scores are compared against to determine actual matches.

matching

In Oracle Cash Management, the process where batches or detailed transactions are associated with a statement line based on the transaction number, amount, currency and other variables, taking Cash Management system parameters into consideration. In Cash Management, matching can be done manually or automatically.

In Oracle Payables and Oracle Assets, the process of comparing purchase order, invoice, and receiving information to verify that ordering, billing, and receiving information is consistent within accepted tolerance levels. Payables uses matching to control payments to suppliers. You can use the matching feature in Payables if you have Purchasing or another purchasing system. Payables supports two-, three-, and four-way matching.

measure

A pre-seeded or user-defined criterion for performance or schedule that is used to determine if a project is on track.

message line

A line on the bottom of a window that displays helpful hints or warning messages when you encounter an error.

mid task

A task that is not a top task or a lowest task.

multi-org

See: multiple organizations, page Glossary-30

multiple organizations

The ability to define multiple organizations and the relationships among them within a single installation of Oracle Applications. These organizations can be sets of books, business groups, legal entities, operating units, or inventory organizations.

Multiple Reporting Currencies

A unique set of features embedded in Oracle Applications that allows you to maintain and report accounting records at the transaction level in more than one functional currency.

net present value

The present value of the future net cash flow of a project, investment class code, or scenario using the discount rate defined. Net present value of a project is calculated by discounting all future revenues and costs for the project to the present point in time, and discounting their value based on the discount rate. Net present value for an investment

class code or a scenario is calculated by discounting all future revenues and costs for all approved projects in the investment class code or scenario.

node

An instance of an activity in an Oracle Workflow process diagram as shown in the Process window of Oracle Workflow Builder. See also

non-capacity work type

Work types assigned to forecast assignment items or actual expenditure items reduce the total capacity of a given resource for the specified time period.

non-invoice related claim

A claim that is due to a discrepancy between the billed amount and the paid amount, and cannot be identified with a particular transaction.

non-labor invoice burden schedule

A burden schedule used to derive invoice amounts for non-labor items.

non-labor resource

An implementation-defined asset or pool of assets. For example, you can define a non-labor resource with a name such as *PC* to represent multiple personal computers your business owns.

non-labor revenue burden schedule

A burden schedule used to derive revenue amounts for non-labor items.

non-project budget

A budget defined outside Oracle Projects. Examples include organization-level budgets defined in Oracle General Ledger, and budgets defined in Oracle Contract Commitments.

non-revenue sales credit

Sales credit you assign to your salespeople that is not associated with your invoice lines. This is sales credit given in excess of your revenue sales credit.

See also: revenue sales credit, page Glossary-43

offsets

Reversing transactions used to balance allocation transactions with the source or other project.

one-time billing hold

A type of hold that places expenditure items and events on billing hold for a particular invoice; when you release that invoice, the items are billed on the next invoice.

operating unit

An organization that partitions data for subledger products (AP, AR, PA, PO, OE). An operating unit is roughly equivalent to a single pre-Multi-Org installation.

operator

A mathematical symbol you use to indicate the mathematical operation in your calculation.

option group

A set of option buttons. You can choose only one option button in an option group at a time, and the option group takes on that button's value after you choose it. An option button or option group is also referred to as a radio button or radio group, respectively.

Oracle Discoverer

An Oracle tool that enables users to retrieve data from a database. Oracle Discoverer provides a user friendly method for creating database queries and displaying information.

organization

A business unit such as a company, division, or department. Organization can refer to a complete company, or to divisions within a company. Typically, you define an organization or a similar term as part of your account when you implement Oracle Financials.

Internal organizations are divisions, groups, cost centers or other organizational units in a company. External organizations can include the contractors your company employs. Organizations can be used to demonstrate ownership or management of functions such as projects and tasks, non-labor resources, and bill rate schedules.

See also: business group, page Glossary-9, item validation organization, page Glossary-26

organization hierarchy

An organizational hierarchy illustrates the relationships between your organizations. A hierarchy determines which organizations are subordinate to other organizations. The topmost organization of an organization hierarchy is generally the business group.

organization structure

See: organization hierarchy, page Glossary-32

original budget

The budget amounts for a project at the first successful baseline of the project.

Overtime Calculation Program

A program that Oracle Projects provides to determine which kind of overtime to award an employee based on the employee's labor costing rule and hours worked. If your company uses this automatic overtime calculation feature, you may need to modify the program based on the overtime requirements of your business.

overtime cost

The currency amount over straight time cost that an employee is paid for overtime hours worked. Also referred to as *premium cost*.

PA Date

The end date of the PA Period in which costs are distributed, revenue is created, or an invoice is generated. This date is determined from the open or future PA Period on or after the latest date of expenditure item dates and event completion dates included in a cost distribution line, revenue, or an invoice.

PA Period

See: project accounting period, page Glossary-36

PA Period Type

The Period Type as specified in the PA implementation options for Oracle Projects to copy project accounting periods. Oracle Projects uses the periods in the PA Period Type to populate each Operating Unit's PA periods. PA periods are mapped to GL periods which are used when generating accounting transactions. PA periods drive the project summary for Project Status Inquiry. You define your accounting periods in the Operating Unit's Set of Books Calendar.

parallel allocation

A set of allocation rules that carries out the rules in an autoallocation set without regard to the outcome of the other rules in the set. See also

See also: autoallocation set, page Glossary-5

parent request

A concurrent request that submits other concurrent requests (child requests). For example, a report set is a parent request that submits reports and/or programs (child requests).

partial matching

A condition where the invoice quantity is less than the quantity originally ordered, in which case you are matching only part of a purchase order shipment line.

See also: complete matching, page Glossary-11, matching, page Glossary-30

pay type

See: labor costing rule, page Glossary-28

payback period

The length of time it takes to recoup the initial net dollars invested, without regard to the time value of money. Payback period of a project, investment class code, or scenario is calculated as the number of months it takes to recoup total cost.

percentile

The percentage of scores in a distribution that a specific equals or exceeds. Percentile is always a number between 1 and 100. A percentile conveys the rank of a score, rather than its value. For example, if Student A achieves a score of 88% on a test, and 95% of the other students receive the same score or a lower score, Student A's percentile rank is 95 (Student A scored in the 95th percentile).

Oracle Project Portfolio Planning uses the following percentile measures: financial percentile, strategic percentile, risk percentile, and investment index. You cannot roll up the percentiles of projects to the scenario level.

performance rule

Defines conditions or thresholds to help determine project performance for a measure.

See also: threshold, page Glossary-11

phase

A collection of logically related project activities, usually culminating in the completion of a major deliverable.

planned benefit

The estimated revenue amounts at the completion of a project. Planned benefit is defined at the project level and can be rolled up to the investment class and scenario levels for approved projects. Planned benefit amounts do not include funding outside the funding period.

pop-up window

An additional window that appears on an Oracle Applications form when your cursor enters a field.

poplist

A poplist, when selected by your mouse, lets you choose a single value from a predefined list.

portfolio plan

A set of one or more scenarios for a portfolio. At the end of a planning cycle, a portfolio analyst chooses one or more scenarios to recommend and then submits the plan for approval. A portfolio approver chooses which scenario to approve and then approves the overall plan.

portfolio planning cycle

A series of activities to examine proactively active projects and new project proposals, to select projects to fund, based on alignment with organizational strategic objectives and financial and resource constraints. A portfolio planning cycle begins when a portfolio analyst initiates the planning cycle, and ends when the plan is approved and closed.

portfolio selection classification

A class category that is selected as a profile option by the implementation team to select projects into different portfolios.

posting

The process of updating account balances in Oracle General Ledger from journal entries. Payables uses the term posting to describe the process of transferring accounting entries to General Ledger. Payables transfers your invoice and payment accounting entries and sets the status of the payments and invoices to posted. You must then complete the process by creating and posting the journal entries in General Ledger.

Note that Oracle Applications sometimes use the term posting to describe the process of transferring posting information to your general ledger.

See also: journal import, page Glossary-28

premium cost

See: overtime cost, page Glossary-32

primary contact

A person in the organization with resource authority.

primary set of books

The set of books you use to manage your business. You can choose accrual or cash basis as the accounting method for your primary set of books.

process

A set of Oracle Workflow activities that need to be performed to accomplish a business goal.

See also: Account Generator, page Glossary-1, process activity, page Glossary-35, process definition, page Glossary-35

process activity

An Oracle Workflow process modelled as an activity so that it can be referenced by other processes; also known as a subprocess.

See also: process, page Glossary-35

process cycle

The planned schedule for batch processing of costs, revenue, and invoices, according to your company's scheduling requirements.

See also: streamline request, page Glossary-46

process definition

An Oracle Workflow process as defined in the Oracle Workflow Builder.

See also: process, page Glossary-35

process responsibility type

An implementation-defined name to which a group of reports and processes are assigned. This group of reports and processes is then assigned to an Oracle Projects responsibility. A process responsibility type gives a user access to Oracle Projects reports and programs appropriate to that user's job. For example, the process responsibility type Data Entry could be a set of reports used by data entry clerks.

See also: responsibility, page Glossary-41

product lifecycle management

A process for guiding products from their birth through their completion. The lifecycle management process adds business value to an enterprise by using product information to support planning, monitoring, and execution of vital activities.

profile option

A set of options that control access to certain features throughout Oracle Applications and determines how data is processed. Generally, profile options can be set at the Site, Application, Responsibility, and User levels. For more information, see the user guide for your specific Oracle Application.

See also: user profile, page Glossary-50

project

A unit of work that requires resources to produce measurable results. A project can be broken down into one or more tasks. A project is the unit of work for which you specify revenue and billing methods, invoice formats, a managing organization and

project manager, and bill rate schedules. You can charge costs to a project, and you can generate and maintain revenue, invoice, unbilled receivable, and unearned revenue information for a project.

Project Accounting Period

An implementation-defined period against which project performance may be measured. Also referred to as *PA Periods*. You define project accounting periods to track project accounting data on a periodic basis by assigning a start date, end date, and closing status to each period. Typically, you define project accounting periods on a weekly basis, and your general ledger periods on a monthly basis.

project burdening organization hierarchy

The organization hierarchy version that Oracle Projects uses to compile burden schedules. Each business group must designate one and only one version of an organization hierarchy as its Project Burdening Organization Hierarchy. (Note: In Oracle Projects Implementation Options, each operating unit is associated with an organization hierarchy and version for project setup, invoice level processing, and project reporting. The Project Burdening Organization Hierarchy selected for the business group does not have to match the hierarchy version in the Implementation Options.)

project chargeable employees

In a multiple organization installation, employees included as labor resource pool to a project. This includes all employees, as defined in Oracle Human Resources, who belong to the business group associated with the project operating unit.

project currency

The user-defined project currency. This currency can differ from the functional currency of the operating unit that owns the project. You can select any active currency defined in Oracle General Ledger.

project funding

An allocation of revenue from an agreement to a project or task.

project funding approval status

A system-defined, project-level status (distinct from project status). Project funding approval status represents the decision that was made about a project in the approved scenario in the most recently approved plan. The project funding approval statuses, which are system-defined, include: Proposed, Approved, On Hold, Rejected, and Null (funding not required).

Users can manually change a project to Proposed or Null status on the project setup page. All other status changes are driven by plan approval actions.

project operating unit

The operating unit within which the project is created, and in which the project customer revenue and receivable invoices are processed.

project portfolio

A collection of projects that are grouped together to facilitate effective analysis, funding, and management. The projects can be related or independent of each other. The projects typically share the same strategic objectives and the same scarce resources.

project resource group

The job group used to identify appropriate roles for use within Project Resource Management.

project/task organization

The Organization that owns the project or task. This can be any organization in the LOV (list of values) for the project setup. The Project/Task Organization LOV contains organizations of the Project/Task Organization Type in the Organization Hierarchy and Version below the Start Organization. You specify your Start Organization and Version in the Implementation Options window.

project role

An implementation-defined classification of the relationship that an employee has to a project. You use project roles to define an employee's level of access to project information.

project status

An implementation-defined classification of the status of a project. Typical project statuses are Active and Closed.

project template

A standard project you create for use in creating other projects. You set up project templates that have features common in the projects you want to create.

project type

A template defined for your implementation. The template consists of project attributes such as the project type class (contract, indirect, or capital), the default revenue distribution rule and bill rate schedules, and whether the project burdens costs. For example, you can define a project type with a name such as *Time and Materials* for all projects that are based on time and materials contracts.

project type class

An additional classification for project types that indicates how to collect and track costs, quantities, and, in some cases, revenue and billing. Oracle Projects predefines three project type classes: *Indirect*, *Contract*, or *Capital*. For example, you use an Indirect project type to collect and track project costs for overhead activities, such as administrative and overhead work, marketing, and bid and proposal preparation.

project/customer relationship

An implementation-defined classification of the relationship between a project and a customer. Project/Customer Relationships help you manage projects that involve multiple clients by specifying the various relationships your customers can have with a project. Typical relationships include Primary or Non-Paying.

project/task alias

A user-defined short name for a project or project/task combination used to facilitate online timecard and expense report entry.

project/task organization

The organization that owns the project or task.

protection level

In Oracle Workflow, a numeric value ranging from 0 to 1000 that represents who the data is protected from for modification. When workflow data is defined, it can either be set to customizable (1000), meaning anyone can modify it, or it can be assigned a protection level that is equal to the access level of the user defining the data. In the latter case, only users operating at an access level equal to or lower than the data's protection level can modify the data.

See also: Account Generator, page Glossary-1

provider operating unit

The operating unit whose resources provide services to another project or organization. For cross charge transactions, the provider operating unit is the expenditure operating unit; the project operating unit owns the intercompany billing project.

provider organization

For cross charge transactions, the organization that provides resources to another organization. The default is the expenditure organization or the non-labor resource organization, which can be overridden using the Provider and Receiver Organization Override client extension.

provider project

The contract project that performs work on behalf of another (receiver) project.

provider transfer price functional currency

The functional currency of the set of books for the *provider operating unit*.

provider transfer price functional currency amount

The currency amount calculated by applying the transfer price currency conversion attributes (as specified by the implementation options for the provider operating unit) to the transfer price base currency amount.

provisional schedule

A burden schedule of estimated burden multipliers that are later audited to determine the actual rates. You apply actual rates to provisional schedules by replacing the provisional multipliers with actual multipliers. Oracle Projects processes adjustments that account for the difference between the provisional and actual calculations.

purchase order (PO)

In Oracle General Ledger and Oracle Projects, a document used to buy and request delivery of goods or services from a supplier.

purchase order (PO)

In Oracle Assets, the order on which the purchasing department approved a purchase.

purchase order distribution

Each purchase order shipment consists of one or more purchase order distributions. A purchase order distribution consists of the Accounting Flexfield information Payables uses to create invoice distributions.

purchase order line

An order for a specific quantity of a particular item at a negotiated price. Each purchase order in Purchasing can consist of one or more purchase order lines.

purchase order requisition line

Each purchase order line is created from one or more purchase order requisition lines. Purchasing creates purchase order requisition lines from individual requisitions.

purchase requisition

An internal request for goods or services. A requisition can originate from an employee or from another process, such as inventory or manufacturing. Each requisition can include many lines, generally with a distinct item on each requisition line. Each requisition line includes at least a description of the item, the unit of measure, the quantity needed, the price per item, and the Accounting Flexfield you are charging for the item. Also known as *internal requisition*.

See also: internal sales order, page Glossary-24

purchasing site

A supplier site from which you order goods or services. You must enter at least one purchasing site before Purchasing will allow you to enter a purchase order.

query

A search for applications information that you initiate using an Oracle Applications window.

raw costs

Costs that are directly attributable to work performed. Examples of raw costs are salaries and travel expenses.

receipt currency

The currency in which an expense report item originates.

record

A record is one occurrence of data stored in all the fields of a block. A record is also referred to as a row or a transaction, since one record corresponds to one row of data in a database table or one database transaction.

receiver operating unit

An operating unit whose projects receive services from another project or organization. For inter-project billing , the receiver operating unit is the project operating unit that owns the receiver project.

receiver organization

The operating unit whose projects receive services from another project or organization. For cross charged transactions, the receiver operating unit is the project operating unit that owns

receiver project

A project for which work is performed by another (provider) project. In inter-project billing, the receiver project incurs costs from a Payables invoice generated by the Receivables tieback process performed by the provider project.

receiver task

A task in the receiver project to which costs are assigned on the Payables invoice.

recommended funding approval status

A recommendation for the decision that is made about a project in a scenario.

region

A collection of logically-related fields set apart from other fields by a dashed line that spans a block. Regions help to organize a block so that it is easier to understand. Regions in Release 11i and higher are defined by Tabs.

reimbursement currency

The currency in which an employee chooses to be reimbursed for an expense report.

See also: transaction currency, page Glossary-48

related transaction

Additional transactions that are created for labor transactions using the Labor Transaction Extension. All related transactions are associated with a *source transaction* and are attached to the expenditure item ID of the source transaction. You can identify and process the related transactions by referring to the expenditure item ID of the source transaction. Using labor transaction extensions, you can create, identify, and process the related transactions along with the source transaction.

released date

The date on which an invoice and its associated revenue is released.

remit to addresses

The address to which your customers remit their payments.

report

an organized display of information drawn from Oracle Applications that can be viewed online or printed. Most applications provide standard and customizable reports. Oracle General Ledger's Financial Statement Generator lets you build detailed financial reports and statements based on your business needs.

report headings

A descriptive section found at the top of each report detailing general information about the report such as set of books and date.

report option

See: report parameter, page Glossary-41

report parameter

Submission options in Oracle Applications that allow you to enter date and account ranges. You can also sort, format, select, and summarize the information displayed in your reports. Most standard reports require you enter report parameters.

report security group

A feature that helps your system administrator control your access to reports and programs. Your system administrator defines a report security group which consists of a group of reports and/or programs and assigns a report security group to each responsibility that has access to run reports using Standard Report Submission. When you submit reports using Standard Report Submission, you can only choose from those reports and programs in the report security group assigned to your responsibility.

report set

A group of reports that you submit at the same time to run as one transaction. A report set allows you to submit the same set of reports regularly without having to specify each report individually. For example, you can define a report set that prints all of your regular month-end management reports.

requirement

Unfilled work position on a project.

resource

A user-defined group of employees, organizations, jobs, suppliers, expenditure categories, revenue categories, expenditure types, or event types for purposes of defining budgets or summarizing actuals.

responsibility

A level of authority set up by your system administrator in Oracle Applications. A responsibility lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

responsibility type

See: process responsibility type, page Glossary-35

result code

In Oracle Workflow, the internal name of a result value, as defined by the result type.

See also: result type, page Glossary-41, result value, page Glossary-41

result type

In Oracle Workflow, the name of the lookup type that contains an activity's possible result values.

See also: result code, page Glossary-41, result value, page Glossary-41

result value

In Oracle Workflow, the value returned by a completed activity, such as *Approved*.

See also: result code, page Glossary-41, result type, page Glossary-41

return on investment

An index used to evaluate projects for which net present values have been determined. The higher the number, the more financially attractive the projects are. Return on investment of a project, investment class code, or scenario is determined by dividing net present value of the project, investment class code or scenario by its total cost.

revenue

In Oracle Projects, the amounts recognized as income or expected billing to be received for work on a project.

revenue accrual

The function of calculating and distributing revenue.

revenue authorization rule

A configurable criterion that, if enabled, must be met before a project can accrue revenue. For example, an active mandatory revenue authorization rule states that a project manager must exist on a project before that project can accrue revenue. Revenue authorization rules are associated with revenue distribution rules.

See also: revenue distribution rule, page Glossary-42

revenue budget

The estimated revenue amounts at completion of a project. Revenue budget amounts can be summary or detail.

revenue burden schedule

A burden schedule used for revenue accrual to derive the revenue amount for an expenditure item. This schedule may be different from your invoice burden schedule, if you want to accrue revenue at a different rate than you want to invoice.

revenue category

An implementation-defined grouping of expenditure types by type of revenue. For example, a revenue category with a name such as *Labor* refers to labor revenue.

revenue credit

Credit that an employee receives for project revenue.

See also: revenue sales credit, page Glossary-43

revenue distribution rule

A specific combination of revenue accrual and invoicing methods that determine how Oracle Projects generates revenue and invoice amounts for a project.

See also: revenue authorization rule, page Glossary-42

revenue item

A single line of a project's revenue, containing event or expenditure item revenue summarized by top task and revenue category or event.

revenue sales credit

Sales credit you assign to your salespeople that is based on your invoice lines. The total percentage of all revenue sales credit must be equal to 100% of your invoice lines amount. Also known as *quota sales credits*.

See also: non-revenue sales credit, page Glossary-31, sales credit, page Glossary-43

revenue write-off

An event type classification that reduces revenue by the amount of the write-off. You cannot write-off an amount that exceeds the current unbilled receivables balance on a project.

See also: invoice write-off, page Glossary-26

risk percentile

The percentile rank of the investment on the risk metric. This value is calculated by (1) ranking the projects, highest to lowest, by risk score, then (2) performing this calculation: percentile = $(((A-B)/A)*100)$, where A represents the total number of projects and B represents the project ranking.

risk score

The weighted strategic score measured against risk. You can define and nominate a group of strategic objectives to measure risk.

root window

The root window displays the main menu bar and tool bar for every session of Oracle Applications. In Microsoft Windows, the root window is titled *Oracle Applications* and contains all the Oracle Applications windows you run. In the Motif environment, the root window is titled *Toolbar* because it displays just the toolbar and main menu bar.

row

One occurrence of the information displayed in the fields of a block. A block may show only one row of information at a time, or it may display several rows of information at once, depending on its layout. The term *row* is synonymous with the term *record*.

sales credit

Credits that you assign to your salespeople when you enter orders, invoices, and commitments. Credits can be either quota or non-quota and can be used in determining commissions.

See also: non-revenue sales credit, page Glossary-31, revenue sales credit, page Glossary-43

sales tax

A tax collected by a tax authority on purchases of goods and services. The supplier of the good or service collects sales taxes from its customers (tax is usually included in the invoice amount) and remits them to a tax authority. Tax is usually charged as a percentage of the price of the good or service. The percentage rate usually varies by authority and sometimes by category of product. Sales taxes are expenses to the buyer of goods and services.

salesperson

A person who is responsible for the sale of products or services. Salespeople are associated with orders, returns, invoices, commitments, and customers. You can also assign sales credits to your salespeople.

schedule

The working hours defined by the calendar and schedule exceptions.

schedule fixed date

The date used to freeze bill rate or burden schedules for a project or task. You enter a fixed date to specify that you want to use particular rates or multipliers as of that date. You do not use schedule fixed dates if you want to use the current effective rates or multipliers for a particular schedule.

scrollable region

A region whose contents are not entirely visible in a window. A scrollable region contains a horizontal or vertical scroll bar so that you can scroll horizontally or vertically to view additional fields hidden in the region.

scenario

A set of projects considered for funding, typically modeled to examine a potential business scenario. A scenario is a planning instance for a portfolio planning cycle to support funding approval decisions. You can model multiple scenarios simultaneously during a portfolio planning cycle.

scenario project

A project that is being considered as part of a scenario. A scenario includes or excludes a project by adding or removing a scenario project. The same project can be included in multiple scenarios.

segment

A single sub-field within a flexfield. You define the structure and meaning of individual segments when customizing a flexfield.

service type

An implementation-defined classification of the type of work performed on a task.

set of books

Defined in Oracle General Ledger, an organization or group of organizations that share a common chart of accounts, calendar, and currency. A set of books is associated with one or more responsibilities.

To use Multiple Reporting Currencies, you must create a primary set of books and separate reporting sets of books for each reporting currency.

soft limit

The default option for an agreement that generates a warning when you accrue revenue or generate invoices beyond the amount allocated to a project or task by the agreement, but does not prevent you from running these processes.

See also: hard limit, page Glossary-23

shorthand flexfield entry

A quick way to enter key flexfield data using shorthand aliases (names) that represent valid flexfield combinations or patterns of valid segment values. Your organization can specify flexfields that will use shorthand flexfield entry and define shorthand aliases for these flexfields that represent complete or partial sets of key flexfield segment values.

shorthand window

A single-segment customizable field that appears in a pop-up window when you enter a key flexfield. The shorthand flexfield pop-up window only appears if you enable shorthand entry for that particular key flexfield.

sign-on

An Oracle Applications user name and password that allows you to gain access to Oracle Applications. Each sign-on is assigned one or more responsibilities.

Single Business Group Access mode (SBGA mode)

An installation that has selected No for the profile option *HR: Cross Business Group* is operating in *SBGA mode.*

source pool

The combination of all the source amounts defined by an allocation rule.

See also: allocation rule, page Glossary-3, target, page Glossary-47

source transaction

For related transactions, the identifying source transaction from which the related items are created.

spot exchange rate

A daily exchange rate you use to perform foreign currency conversions. The spot exchange rate is usually a quoted market rate that applies to the immediate delivery of one currency for another.

standard bill rate schedule currency

The functional currency of the operating unit in which the standard bill rate schedule is maintained.

standard request submission

A standard interface in Oracle Applications in which you run and monitor your application's reports and other processes.

start organization

An organization that defines a set which includes itself and all subordinate organizations in the organization hierarchy. When you choose a start organization as a report parameter, all organizations below the start organization are included in the report.

status line

A status line appearing below the message line of a root window that displays status information about the current window or field. A status line can contain the following: **^** or **v** symbols indicate previous records before or additional records following the current record in the current block; *Enter Query* indicates that the current block is in Enter Query

mode, so you can specify search criteria for a query; *Count* indicates how many records were retrieved or displayed by a query (this number increases with each new record you access but does not decrease when you return to a prior record); the *<Insert>* indicator or *lamp* informs you that the current window is in insert character mode; and the *<List>* lamp appears when a list of values is available for the current field.

step-down allocation

In Oracle Projects, a set of allocation rules that carries out the rules (steps) an autoallocation set serially, in the sequence specified in the set. Usually the result of each step will be used in the next step. Oracle Workflow controls the flow of the autoallocations set. See also

See also: autoallocation set, page Glossary-5

straight time cost

The monetary amount that an employee is paid for straight time (regular) hours worked.

strategic percentile

The percentile rank of the investment on the strategic metric. This value is calculated by ranking the projects, highest to lowest, by weighted strategic score, then performing the following calculation: percentile = (((A-B)/A)* 100), where A represents the total number of projects and B represents the project ranking.

streamline process

See: streamline request, page Glossary-46

streamline request

A process that runs multiple Oracle Projects processes in sequence. When using streamline processing, you can reschedule your streamline requests by setting rescheduling parameters. Rescheduling parameters allow you to configure your processes to run automatically, according to a defined schedule. When you reschedule a process, the concurrent manager submits another concurrent request with a status of *Pending*, and with a start date according to the parameters you define.

structure

A structure is a specific combination of segments for a key flexfield. If you add or remove segments, or rearrange the order of segments in a key flexfield, you get a different structure.

subtask

A hierarchical unit of work. Subtasks are any tasks that you create under a parent task. Child subtasks constitute the lowest level of your work breakdown structure; where Oracle Projects looks when processing task charges and for determining task revenue accrual amounts.

See also: task, page Glossary-47

summarization

Processing a project's cost, revenue, commitment, and budget information to be displayed in the Project, Task, and Resource Project Status windows. You must distribute costs for any expenditure items, accrue and release any revenue, create any

commitments, and baseline a budget for your project before you can view summary project amounts. Formerly known as *accumulation*.

sunk cost

Investment of capital and efforts before a decision is made to undertake or continue a project. Both actual costs and committed costs of a project are included in sunk cost. The sum of costs that occur before the Funding Period From date are sunk cost. Sunk cost is included in total cost.

supplier

A business or individual that provides goods or services or both in return for payment.

supplier invoice

An external supplier's invoice entered into Oracle Payables.

system linkage

See: expenditure type class, page Glossary-18

tablespace

The area in which an Oracle database is divided to hold tables.

target

A project, task, or both that receives allocation amounts, as specified by an allocation rule.

task

A subdivision of project work. Each project can have a set of top tasks and a hierarchy of subtasks below each top task.

See also: work breakdown structure, page Glossary-51, subtask, page Glossary-46

task organization

The organization that is assigned to manage the work on a task.

task service type

See: service type, page Glossary-44

tax authority

A governmental entity that collects taxes on goods and services purchased by a customer from a supplier. In some countries, there are many authorities (e.g. state, local, and federal governments in the U.S.), while in others there may be only one. Each authority may charge a different tax rate. You can define a unique tax name for each tax authority. If you have only one tax authority, you can define a unique tax name for each tax rate that it charges.

In Oracle Receivables, tax authority consists of all components of your tax structure. For example: California. San Mateo. Redwood Shores for State. County. City. Oracle Receivables adds together the tax rates for all of these locations to determine a customer's total tax liability for an invoice

tax codes

Codes to which you assign sales tax or value-added tax rates, tax type, taxable basis, tax controls, and tax accounting. You can define a tax code for inclusive or exclusive tax

calculation. Oracle Receivables lets you choose state codes as the tax code when you define sales tax rates for the United States. (Receivables Lookup)

team role

Specific position on a project representing either requirements or assignments.

temporary labor

See: contingent worker, page Glossary-12

Time and Materials (T&M)

A revenue accrual and billing method that calculates revenue and billings as the sum of the amounts from each individual expenditure item. The expenditure item amounts are calculated by applying a rate or markup to each item.

time intervals

The units that define how budget amounts are accumulated to determine the available funds for a transaction. Used to define budgetary controls for a project.

timecard

A weekly submission of labor expenditure items. You can enter timecards online, or as part of a pre-approved batch.

toolbar

The toolbar is a collection of iconic buttons that each perform a specific action when you choose it. Each toolbar button replicates a commonly-used menu item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. You can display a hint for an enabled toolbar button on the message line by holding your mouse steadily over the button. The toolbar generally appears below the main menu bar in the root window.

top task

A task whose parent is the project.

total cost

In Oracle Project Portfolio Planning, the sum of estimate to complete plus sunk cost. Total cost disregards any cost after the Effective Period To date.

Total cost is defined at the project level and can be rolled up to the investment class code and scenario levels.

Total cost of an investment class code or scenario is the sum of total cost for all projects whose recommended funding approval status is set to Approved.

transaction currency

The currency in which a transaction originally takes place. For processing purposes, the reimbursement currency in an expense report is the transaction currency.

transfer price

The price agreed upon by the provider and receiver organizations in a cross charged transaction.

transfer price base currency

The transfer price basis determines the currency. For a basis of raw or burdened cost, the transfer price base currency is the transaction currency of the cross charged transaction. For a basis of revenue, the transfer price base currency is the functional currency of the set of books for the receiver operating unit. For a basis calculated using the bill rate schedule, the transfer price base currency is the standard bill rate schedule currency.

transferred date

The date on which you transfer costs, revenue, and invoices to other Oracle Applications.

transformation function

A seeded or user-defined rule that transforms and standardizes TCA attribute values into representations that can assist in the identification of potential matches.

transition

In Oracle Workflow, the relationship that defines the completion of one activity and the activation of another activity within a process. In a process diagram, the arrow drawn between two activities represents a transition.

See also: activity, page Glossary-2, Workflow Engine, page Glossary-51

unassigned time

The net amount of hours for a given period for which a resource does not have any scheduled assignments (capacity hours minus scheduled hours.)

unbilled receivables

The amount of open receivables that have not yet been billed for a project.Oracle Projects calculates unbilled receivables using the following formula: *(Unbilled Receivables = Revenue Accrued - Amount Invoice)*

unearned revenue

Revenue received and recorded as a liability or revenue before the revenue has been earned by providing goods or services to a customer. Oracle Projects calculates unearned revenue using the following formula: *(Unearned Revenue = Amount Invoiced - Revenue Accrued)*

unit of measure

A classification created in Oracle General Ledger that you assign to transactions in General Ledger and subledger applications. Each unit of measure belongs to a unit of measure class.

For example, if you specify the unit of measure Miles when you define an expenditure type for personal car use, Oracle Projects calculates the cost of using a personal car by mileage. Or, in Oracle Payables, you define square feet as a unit of measure. When you enter invoices for office rent, you can track the square footage addition to the dollar amount of the invoice.

In Oracle Assets, unit of measure is a label for the production quantities for a unit of production asset.

UOM

See: unit of measure, page Glossary-49

usage

See: non-labor resource, page Glossary-31

usage cost rate override

The cost rate assigned to a particular non-labor resource and non-labor organization which overrides the rate assigned to its expenditure type.

usage logs

Usage logs record the utilization of company assets on projects as the asset is used.

user profile

A set of changeable options that affect the way your applications run. You can change the value of a user profile option at any time.

See also: profile option, page Glossary-35

utilization

A measure of how effectively a resource was used or is projected to be used.

utilization method

Capacity Utilization Method compares the actual (productive) work performed and forecasted (productive) work to be performed by the resource to the capacity of a resource.

Worked Hours Utilization Method compares the actual (productive) work performed and forecasted (productive) work to be performed by the resource to the total number of hours recorded (actuals) or assigned (forecasted) of a resource.

utilization category

An implementation-defined category used for utilization reporting. This reporting grouping combines one or more work types for organization and resource utilization views.

utilization view

Utilization views enable you to measure a resource or organization utilization percentage based on different groupings of work types.

value

Data you enter in a parameter. A value can be a date, a name, or a code, depending on the parameter.

value set

A group of values and related attributes you assign to an account segment or to a descriptive flexfield segment. Values in each value set have the same maximum length, validation type, alphanumeric option, and so on.

vendor

See: supplier, page Glossary-47

weighted strategic score

The score for a project, investment class code, or scenario when compared with a set of strategic groups. Weighted Strategic Score of a project is weighted by the percentages

defined for the strategic objectives and groups during planning cycle setup. At the investment class code and scenario levels, the weighted strategic score is calculated as the average weighted score across all approved projects within the scenario or investment class code, weighted by the planned costs of those projects.

window

A box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.

window title

A window title at the top of each window indicates the name of the window, and occasionally, context information pertinent to the content of the window. The context information, contained in parentheses, can include the organization, set of books, or business group associated with the window contents.

WIP

See: work in process., page Glossary-51

word replacement

A word mapping that is used to create synonyms which are treated as equivalents for searching and matching.

work breakdown structure (WBS)

The breakdown of project work into tasks. These tasks can be broken down further into subtasks, or hierarchical units of work.

work in process

An item in various phases of production in a manufacturing plant. This includes raw material awaiting processing up to final assemblies ready to be received into inventory.

work site

The customer site where project or task work is performed.

work type

Work types are an implementation-defined classification of work performed. Work types are used to classify both actual and forecast amounts. Examples are Billable, Non-Billable, Training, and Personal. Work types are grouped together by Utilization Categories.

worksheet

A specific grouping of information within an Analysis Workbook. A workbook is composed of one or more worksheets, each with its own set of data and graphs. Conceptually, this is similar to the ''sheets" and ''workbook" concept within a spreadsheet application.

Workflow Engine

The Oracle Workflow component that implements a workflow process definition. The Workflow Engine manages the state of all activities, automatically executes functions, maintains a history of completed activities, and detects error conditions and

starts error processes. The Workflow Engine is implemented in server PL/SQL and activated when a call to an engine API is made.

See also: Account Generator, page Glossary-1, activity, page Glossary-2, function, page Glossary-20, item type, page Glossary-26

write-off

See: invoice write-off, page Glossary-26, revenue write-off, page Glossary-43

write-on

An event type classification that causes revenue to accrue and generates an invoice for the amount of the write-on.

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