Oracle

Project Portfolio Management Cloud

Creating and Administering Analytics and Reports

Release 12

This guide also applies to on-premise implementations

ORACLE

Oracle® Project Portfolio Management Cloud Creating and Administering Analytics and Reports

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Contents

Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon in the global area. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use **Oracle Applications Customer Connect** to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the **Oracle Help Center** to find guides and videos.
- **Training:** Take courses on Oracle Cloud from **Oracle University** .

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the **Oracle Accessibility Program** .

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.

1 Overview

About This Guide

This guide is intended for advanced users and administrators who want to modify and create custom analytics and reports, as well as perform setup and maintenance tasks for business intelligence. The guide contains both conceptual and procedural information intended to help you build and manage analyses, reports, and dashboards that are tailored to the content needs of your line of business or company. You can also use the information in this guide to help you set up business intelligence.

Creating and Administering Project Portfolio Management Analytics and Reports: Overview

Business intelligence involves analyzing data to gain insight into your reporting needs, gathering information to meet specific requirements, and making informed decisions.

Using Analytics and Reports

You can use different types of predefined analytics and reports, or create and edit them, to support your business needs. Oracle Fusion Project Portfolio Management offers predefined analytics and reports across various subject areas. You can use these predefined analytics and reports, or customize them based on your business needs after creating a copy.

You can use Oracle Transactional Business Intelligence to create analytics and Oracle Business Intelligence Publisher to create reports.

> **Note:** Don't edit predefined analytics and reports directly. If you need to customize them, you can create a copy and edit the copy.

This table describes the purpose of analytics and reports.

Type	Description	Purpose
Analytic	Business intelligence object such as analysis or dashboard that provides meaningful data.	To help in business decision making.
Analysis	Interactive display of data, for example in a table or graph. Also referred to as real-time analysis.	To summarize or break down simple, real-time data. To help you make tactical decisions.
Report	Output of data in a predefined format that provides little or no interaction.	To get high-volume data in a high-fidelity output optimized for printing.

Type	Description	Purpose
	Also referred to as predefined report or output report.	For documents to support internal operations, statutory requirements, and other business needs.

Customizing Analytics and Reports

You can create, edit, and customize analytics and reports for yourself and others if you have appropriate access.

For example, you can:

- Add or remove columns from an analysis.
- Change the branding logo on reports.
- Create an analytic dashboard to include your commonly viewed analyses.

Setup and Administration

There are additional tasks that support creating and editing analytics and reports. For example, your implementor or administrator can:

- Configure Oracle Business Intelligence Publisher, the tool used for generating and customizing reports.
- Define flexfields to provide custom attributes that can be used in analyses.
- Archive and move analytics and reports from one environment to another.

Securing Oracle Project Portfolio Management Analytics and Reports: Overview

Users with appropriate roles can create and access analyses and reports based on role access to subject areas and catalog folders.

Analyses and reports are secured by applying job roles with associated duty roles to users. Duty role assignments determine access to subject areas for analyses as well as catalog folders. For information about the job and duty roles provided with Oracle Fusion Project Portfolio Management and how to customize your security model by creating custom job roles and assigning duty roles to them, see Implementing Security in Oracle Fusion Project Portfolio Management in the Securing Oracle ERP Cloud guide.

In addition to folder and object access, duty roles also determine data security. Each of the duty roles that provides access to subject areas and catalog folders is granted one or more data security policies that allow access to the data.

How can I find analytics and reports?

See if the analysis or dashboard already appears on your page, maybe on a separate tab. Or there might be, for example, a link to the report you want to use. Also look for the Reports and Analytics pane, which may appear on your work area as a panel tab or in the regional area. In the pane, you find analytics and reports specific to the work area you're on.

To see all the analytics and reports that you have access to, use the Reports and Analytics work area (**Navigator - Tools - Reports and Analytics**).

Reports and Analytics Pane: Explained

The Reports and Analytics pane is a central place for you to quickly view or run analytics and reports that are related to your work. If you have the permission, you can create and edit analytics and reports here, or add them from the business intelligence (BI) catalog to the pane. You may find this pane in a panel tab or in the regional area on some work areas. In the Reports and Analytics work area (**Navigator - Tools - Reports and Analytics**), the pane appears as the Contents pane.

What's In the Pane

This table describes what's in the top level folders of the Reports and Analytics pane.

Folder	Content
My Folders	Any custom analyses or reports that you saved for your own use only.
Shared Folders	• Any predefined analyses and reports that are relevant to your role. Or, in the Reports and Analytics work area, all the analytics and reports that you have permissions to access. Any shared custom reports and analytics in the Custom subfolder. Place your shared reports and analytics in this folder to protect them during upgrades.

Business Intelligence Catalog: Explained

Reports, analyses, dashboards, and other business intelligence (BI) objects are stored and administered in the business intelligence catalog.

Navigating to the Catalog

To navigate to the catalog:

1. Click **Reports and Analytics** under **Tools** in the Navigator.
2. In the Reports and Analytics pane, click the **Browse Catalog** icon.

Identifying Objects in the Catalog

The catalog stores the BI objects in a directory structure of individual files, organized by product family.

BI objects and reports are organized in the following folder hierarchy:

- Shared Folders (top level)
- Product family (example: Financials)
- Product (example: Payables)
- Report groups (example: Invoices)
- Dashboard reports
- Data Models
- Report Components
- BI Publisher reports
- Prompts

The following table describes the common BI objects that you find in the catalog:

Catalog Object	Description	Location
Analysis	Analyses are used primarily by dashboards.	Report Components folder
Dashboard	Dashboards organize analytical content and catalog objects, and present them in a meaningful way.	Reporting group folder
Dashboard Prompt	Dashboard prompts allow users to filter dashboard content using provided values.	Prompts folder
Filter	Filters are used in dashboards and analyses.	Prompts folder
Report	Reports are operational reports created in Business Intelligence Publisher.	Reporting group folder
Data Model	Subtemplates are used by reports created in Business Intelligence Publisher.	Data Models folder
Subtemplate	Data models are used by reports created in Business Intelligence Publisher.	Reporting group folder

Saving Analytics and Reports: Points to Consider

You can save analyses, dashboards, and reports in the business intelligence (BI) catalog. The catalog has a hierarchy of folders with **My Folders** and **Shared Folders** at the top, and folders like **Custom** under **Shared Folders**.

My Folders

Save your analytics and reports in **My Folders** for personal use. When you save a new analysis, dashboard, or report in this folder, it's available in **My Folders** in the **Reports and Analytics** work area. But you can't view it in **My Folders** in the **Reports and Analytics** pane on any other work area. The only exception is when you create an analysis using the wizard in the **Reports and Analytics** pane, in which case the analysis is available in all work areas.

Shared Folders

Save your custom analytics and reports in **Shared Folders** so that they are available to others. You must save them in the **Custom** folder which has subfolders organized by product family. You can use the **Projects** subfolder for storing these custom analytics.

Edit only copies of your analytics and reports. Directly edit predefined analytics only when necessary and ensure that all references to the analysis or dashboard are functional.

When you create a copy of predefined reports using the **Customize** option, the folder structure and permissions are also copied.

Custom Folder

You must keep all custom objects in the **Custom** folder to:

- Ensure that customized versions of predefined analytics and reports aren't affected when patches are applied.
- Identify and locate custom objects in the **Projects** subfolder.
- Edit objects in the **Custom** folder without compromising security on the original objects.

When you copy an object into the **Custom** folder, the copied object inherits the permission settings of the **Custom** folder. Your administrator must reset the permissions on the object and the folder that it's present in.

What happens to customized analytics and reports when a patch is applied?

All custom analytics and reports are preserved if they're saved in the **Custom** folder (or any subfolder under the Custom folder, for example, **Projects**) within **Shared Folders** in the BI catalog. Changes to predefined analytics and reports outside the Custom folder are preserved if the patch doesn't include a new version of that object. If the patch includes a new version of a predefined object that was edited, then the patch automatically overwrites your changes. If your changes conflict with the new version, the patching process logs the issues and stops. Your administrator must resolve any conflicts manually and then rerun the patch.

Setup and Administration Overview

Define Transactional Business Intelligence Configuration: Overview

Use the Define Transactional Business Intelligence task list in the Setup and Maintenance work area to complete configuration of business intelligence in your application. Some tasks in this task list are performed during Oracle Applications Cloud provisioning and require no further action from you. The Define Transactional Business Intelligence Configuration task list includes the following tasks:

- Optimize Transactional Business Intelligence Repository

  Trim unused projects from the business intelligence repository based on configured Oracle Applications Cloud offerings. This optimization is automated during the provisioning process and requires no further action from you.
- Manage Transactional Business Intelligence Connections

  Review data source connections in the physical layer of the business intelligence repository. Connections are set up and reviewed during the provisioning process, and this task requires no further action from you.
- Manage Security for Transactional Business Intelligence

  Review security for business intelligence users. The default security configuration can be modified. Refer to the security documentation for your cloud services to review or change the default user security model.
- Configure Key Flexfields for Transactional Business Intelligence

  Define the key flexfield segments and validation for use as classification keys. You must define these key flexfields for Oracle Fusion Transactional Business Intelligence to operate correctly.
- Configure Descriptive Flexfields for Transactional Business Intelligence

  Define validation and display properties of descriptive flexfields, which are used to add custom attributes to entities. You enable and import flexfields for use in analyses.
- Import Essbase Cubes into Transactional Business Intelligence Repository for Financials General Ledger

  Import Essbase cubes into the business intelligence repository. You must perform this task if you're using Oracle Fusion General Ledger.
- Manage User Currency Preferences in Transactional Business Intelligence

  Manage user currency preferences, which control regional currency settings, currency used in reports, and corporate currency.

Related Topics

- Essbase Rule File and Cubes: Overview
- Configuring Flexfields for Use in Analyses: Overview
- Configuring Descriptive Flexfields for Transactional Business Intelligence: Overview
- Importing Flexfield Changes: Overview
- Setting Currency Preferences for Analytics

2 Setup and Configuration

Mapping to Work Areas

Setting Up the Reports and Analytics Pane: Procedure

You can find the Reports and Analytics pane in many work areas, and the analytics and reports you see in the pane depends on the work area. You can define what's available for a specific work area, by mapping reports from the business intelligence (BI) catalog to that work area. In this mapping context, reports refer to both analytics and reports. Your changes apply to all users who have access to the work area you're mapping.

Mapping Reports from Your Work Area

To map reports to the work area that you're in:

1. Click the **Edit Settings** icon in the Reports and Analytics pane.

   You see all the reports that are currently mapped to your work area.
2. Click **Select and Add**.
3. Find the report in the catalog and select it.
4. Click **OK**.
5. To remove any mapping, select the report and click **Remove**.
6. Save your work.

Mapping Reports to Any Work Area

To map reports to any work area that you have access to:

1. Go to the Setup and Maintenance work area and open the Map Reports to Work Areas task.
2. Select the application of the work area you want to map to.
3. Select the work area.
4. Click **Search** and see all the reports that are currently mapped to that work area.
5. Click **Select and Add**.
6. Find the report in the catalog and select it.
7. Click **OK**.
8. To remove any mapping, select the report and click **Remove**.

   Tip: Click **Synchronize** to remove all mappings to any reports that are no longer in the catalog. You synchronize all work areas, not just the one you're mapping.
9. Save your work.

Related Topics

- Setting Reports Up for Scheduling in the Reports and Analytics Pane: Procedure
- Reports and Analytics Pane: Explained

Why can't I see reports when mapping reports to work areas for the Reports and Analytics pane?

Either no reports are currently mapped to the work area you select on the Map Reports to Work Areas page, or you don't have access to the reports that are mapped.

Similarly, when you're selecting a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Why can't I see reports when I edit settings for the Reports and Analytics pane?

In the Edit Settings window, you might not see a currently mapped report because you don't have access to it.

Similarly, when you're selecting a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Setting Up Currency

Why don't amounts appear in my analyses?

Your analyses must be set to display amounts in the correct currency, for example, project currency, ledger currency, contract currency, entered currency, and so on. Click the drop-down list next to your name in the global area to open your account. On the Preferences tab, change the currency to the desired currency for amounts to appear on your analysis.

Related Topics

- Overriding the Currency Type in Analyses: Procedure

How can I change the currency in my analysis?

Click the drop-down list next to your name in the global area to open your account. On the Preferences tab, change the currency as required.

You can override the preferred currency at the analysis level to display amounts in a different currency.

Related Topics

- Overriding the Currency Type in Analyses: Procedure

3 Subject Areas

Data Structure for Analytics: Explained

The BI repository defines which columns (or slices of data) are available for you to include in analyses, and where data for each column comes from. The repository is organized into subject areas which contain folders with columns. You can also use the BI repository as a data source for reports.

Columns

The following table describes the three types of columns.

Column Type	Description	Example	Icon for Column Type
Fact	Provides a measure of values that are numbers.	Credit Amount in Contract Currency	Yellow ruler
Attribute	Represents information about a business object with values that are dates, IDs, or text. Attribute columns can be flexfield segments imported into the BI repository.	Contract Association Level	Gray paper
Hierarchy	Holds data values that are organized in a hierarchical manner.	Date - Week To Year hierarchy contains: • Total • Week To Year • Week • Day Detail	Column: Hierarchy of blue squares Sublevel: Blue or white square

Subject Areas

To create an analysis:

1. Select a subject area which contains columns related to a specific business object or business area. For example, **Project Billing - Invoices Real Time**.
2. Open folders within the subject area to find the columns to include in your analysis. For example, you can open the **Project** folder and select the **Project Ledger Currency** column within it.

Folders

Each subject area has one fact folder and a number of dimension folders. Folders can have subfolders. For example, the **Project** folder in **Project Billing - Invoices Real Time** subject area has multiple subfolders like **Project Classification**, **Project Data Attributes**, **Project Record Information**, and so on.

- Fact folders:
  - Contain fact columns.
  - Are usually at the bottom of the list of folders and are usually named after the subject area.
- Dimension folders:
  - Contain attribute and hierarchical columns.
  - Are joined to the fact folder within a subject area.

    For example, if your analysis has Currency attribute from a dimension folder, you see a currency column in the results. If you also add the Total fact, then your analysis includes only those records that have both currency and total amount columns populated. Adding certain columns can reduce the query set for your analysis depending on how you've joined them in the query.

    Note: If you add attributes that don't have a value, you'll see them as null in the results if you've joined them appropriately in the query.
  - Can be common folders or contain common dimensions that appear in more than one subject area. If your analysis has columns from multiple subject areas then you must include:
    - Columns from dimension folders that are common to all those subject areas. At least one such column is mandatory.
    - One column from the fact folder in each of those subject areas.

Subject Areas for Oracle Project Portfolio Management Real-Time Analyses: Overview

You can use multiple subject areas to create real-time analyses and dashboards for Oracle Project Portfolio Management as listed below.

Subject Area	Description	Business Questions
Project Billing - Event Real Time	Analyze real-time information of project contract billing events. View project contract billing events at an individual transaction level and analyze billing events using dimensions such as contract, contract line, project, and task. You can also analyze billing events by event details such as event type, completion date, invoice revenue and status, and reversal indicator.	• Which are the billing events for a project or contract and contract line? • What's the total amount or number of completed billing events which are not invoiced or recognized for revenue for a contract and contract line? • Which billing events are on an invoice hold or a revenue hold?

Subject Area	Description	Business Questions
		• Which billing events are potentially missing an event completion date?
Project Billing - Funding Real Time	Gain insight into project contract funding information to analyze funds consumed for invoice and revenue, and funds remaining by using dimensions such as customer, organization, contract, billing type, project, task, and time.	• Which are the contract lines for a contract? • How much of the contract line amount is invoiced and recognized for revenue? • Which projects are linked to contracts? • Which project contracts are active for a business unit?
Project Billing - Invoices Real Time	Gain insight into real-time project contract invoice information at an individual transaction level and analyze invoicing, concessions, and credits by using dimensions such as customer, organization, contract, billing type, project, task, employee, time, and currency.	• What are the transactions for an invoice line? • Which invoices need attention? • What are the invoice line details for a particular invoice? • Who are the contracted customers for a business unit?
Project Billing - Revenue Real Time	Analyze real-time information on revenue recognized for project contracts. View project contract revenue information at an individual transaction level by using dimensions such as customer, organization, contract, billing type, project, task, employee, time, and currency.	• Which contracts have actual revenue in the current accounting year? • Which contracts have the lowest actual revenue in the current accounting period? • What's the actual revenue trend for accounting periods in the selected accounting year?
Project Control - Budgets Real Time	Analyze project budget data such as raw and burdened cost, planned effort, revenue, and margin for current working, current baseline, and original baseline budget versions. View real-time project budget information by using dimensions such as project, task, employee, time, and planning resource.	• Which projects are under a business unit and what are the statuses of these projects? • What's the budgeted amount for a project for the various budget versions? • What's the planned effort and revenue amount for a project for the various budget versions?
Project Control - Forecasts Real Time	Analyze project forecast data for current, prior, and original forecast versions. View real-time forecast data such as raw and burdened cost, planned effort, revenue, margin, and variance measures such as cost variance, revenue variance, and so on by using dimensions such as project, task, employee, time, and planning resource.	• What are the raw and burdened costs for a project? • What's my cost variance? • What's my margin on a project? • What's the forecasted revenue for a project? • What are the different forecast versions for my project?
Project Control - Progress Real Time	Analyze project progress and view specific progress details such as actual cost, estimated effort to complete, cost percent spent, physical percent complete, and estimated cost at completion. Measure project performance using earned value metrics, including cost variance, cost performance index, and schedule performance index. Analyze performance trends as progress is captured over time and	• What's the latest published physical percent complete for all tasks? • What's the latest published physical percent complete for summary tasks? • What are the planned and actual costs for each task as per the latest published progress? • What are the cost and schedule performance indexes on my project?

Subject Area	Description	Business Questions
	use that information to estimate and control project outcomes.	
Project Costing - Actual Costs Real Time	Analyze actual project costs by viewing supplier, labor, nonlabor, and third-party transaction project costs. View specific costs, associated expenditure items, and distribution line details for a specific project, task, task hierarchy, employee, project organization, and expenditure organization for a specific time period.	• Which capitalizable costs are not yet capitalized? • How much does each transaction source contribute to project costs? • Which transactions contribute to the total cost of my projects?
Project Costing - Assets Real Time	Analyze capital projects and identify possible exceptions by comparing expensed and capitalizable costs. Track capitalizable costs throughout the capitalization process and review asset details, view asset assignments to projects and tasks, analyze amounts charged to different accounts, and drill down to cost distribution lines.	• What's the total capitalized cost of my assets? • How's an expenditure item allocated across assets? • Which cost distributions are included in an asset line? • Which assets are assigned to a task?
Project Costing - Commitments Real Time	Gain insight into project commitment transactions from the procure-to-pay flow. View requisition, purchase order, and supplier invoice measures for a project, task, task hierarchy, project organization, and expenditure organization for a specific time period.	• What are the requisitions and purchase orders that still have commitment costs for my project? • What are the outstanding commitments for my project? • Which commitments are associated with my capital projects?
Project Costing - Expenditure Item Performance - Real Time	Analyze expenditure item performance by gaining insight into project expenditure item costs, and billing and revenue details. View expenditure item type and class information for project, task, task hierarchy, employee, project organization, and expenditure organization for a specific time period.	• What are the billing and revenue details by project? • What was the expenditure incurred on a project in a prior week? • Which expenditure items are associated with my capital projects?
Project Costing - Unprocessed Transactions Real Time	Analyze unprocessed project transactions sourced from Oracle Fusion or third-party applications and view general details about pending, failed, and unprocessed transactions including the original source and processing information. View unprocessed transactions for a project, task, task hierarchy, employee, related expenditure types, project organization, and expenditure organization for a specific time period.	• What unprocessed transactions are waiting to be sent to Oracle Project Portfolio Management? • Which transactions weren't successfully imported to Oracle Project Portfolio Management?
Project Management - Change Management Real Time	Analyze real-time project change order information using dimensions such as change order reason, status, impact, participant, time, and project.	• What's the number of pending change orders grouped by various stages? • What are the reasons for change orders? • What's the estimated cost and revenue for the change order?

Subject Area	Description	Business Questions
		• What's the current stage and status of the change order?
Project Management - Opportunity Integration Real Time	Analyze specific project opportunity details such as status, win probability percentage, deal amounts, and weighted labor bill and cost amounts. View real-time information through opportunity-related project metrics using dimensions such as opportunity, project, and time.	• How many projects are in the pipeline for each customer? • What's the weighted (adjusted) revenue for all projects under this branch of the enterprise project structure? • Which are the projects for this opportunity? • How much did it cost to pursue this deal? • What are the win probabilities for opportunities on a project? • What are the deal and weight labor bill amounts on a project?
Project Management - Planning Real Time	Analyze project plan data and view specific project plan details such as start and finish dates, progress information, planned, actual, and remaining cost, and labor effort. View real-time information through project plan metrics using dimensions such as project, task, employee, progress status, resource, sprint, and time.	• What are the planned billing amounts for my projects? • What are the operating margins for my projects? • What are the planned and actual margins and margin percentages for my projects? • What are the planned and actual costs for my projects? • How much effort is planned per resource role for my projects?
Project Management - Project Issues Real Time	Analyze the issues and related action items that you own or create, or that are related to projects that you manage. View real-time information across different dimensions such as project, owner, issue type, and status.	• Which issues are open for my projects, along with their details? • Which issues are open for an individual owner? • What are my action items? • What patterns are apparent from historic performance on issues? What can we learn from analysis of issues that could help future project performance?
Project Management - Project Hierarchy Real Time	Analyze project plan data such as cost, schedule, effort, and bill amounts rolled up to enterprise project structure. Analyze real-time information through project hierarchy metrics using dimensions such as project hierarchy, resource, employee, task, task hierarchy, progress status, time, project, and sprint.	• What are the actual costs for my EPS elements? • What are the total costs for my EPS elements?
Project Management - Project Resources Real Time	Analyze real-time project resource allocation information, for example, project labor and expense resource allocations using dimensions such as employee, resource class, resource, project role, project resource assignment status, project, and opportunity.	• What are the statuses of the resources currently working on my projects? • Who are the planned resources assigned to my projects? • What are the allocated hours for my project resources?
Project Management - Project Work Items Real Time	Analyze real-time project work item information and view specific project work	• What are the work items for my projects?

Subject Area	Description	Business Questions
	item details such as deliverables, concepts, proposals, requirements specifications, product change orders, items, and negotiations. View real-time information through work item metrics using dimensions such as project, task, priority, and status.	• What are the work item statuses that determine the completion of my project tasks? • Which of my project deliverables are overdue, due soon, and yet to start? • What are the allocated hours for my project resources?
Project Management - Requirements Real Time	Analyze real-time project backlog information for your project backlog items using dimensions such as requirement hierarchy, sprint, product, release, scrum master, backlog owner, project, and task.	• What's the total number of backlog items by status for a product in a given sprint? • What's the total number of story points achieved in each sprint of a release? • Which of my backlog items have exceptions? • What are the planned hours for each backlog item? • What are the backlog items for my projects in a sprint? • What's the remaining effort for my backlog items?
Project Resource Management - Resource Management Real Time	Analyze real-time project resource assignment information, for example, project resource supply, demand (requests and assignments), and utilization using dimensions such as resource, resource pool, role, qualification, time, and project.	• Which requests are in Open or Resource Proposed status? • What's the forecasted revenue and margin for resource requests that are in Open or Resource Proposed status?
Project Resource Management - Resource Pool Real Time	Analyze real-time resource pool information using dimensions such as resource, resource pool, resource pool membership, resource pool hierarchy, department, and location.	• Which resources belong to a resource pool? • What are the dates of pool membership for a resource? • What's a resource's pool membership history since the resource was hired?
Project Management - Task Management Real Time	Analyze the tasks that you own or create, including project tasks, to-do tasks, action items, and milestones.	• Which project tasks are due in 7 days? • In how many days are my project tasks due? • Which project tasks are incomplete? • Which project tasks, milestones, and action items are due?
Projects - Cross Subject Area Analysis - Real Time	Analyze real-time information on project performance, including budgets, forecasts, costs, commitments, revenue, and invoices using dimensions such as award, fiscal calendar, employee, project, task, organizations, and time.	• Is my project profitable? • How much funding has my contract consumed? • How much has been invoiced for my contract? • How does my budgeted cost compare against my actual and forecast costs? • What are my committed costs for a project?

Subject Area	Description	Business Questions
		• How does my budgeted revenue compare against my actual and forecast revenue?
Projects - Grants Management - Award Analysis Real Time	Analyze real-time award information using dimensions such as award, award project, keyword, certification, reference types, and time.	• What are the awards for a specific keyword, for example, awards on diabetes research? • Which award certifications expire in the next 30 days? • What are the proposal numbers for the awards? • Which are the certifications awarded for various projects?
Projects - Grants Management - Award Funding Real Time	Analyze real-time award funding information using dimensions such as award, award project, budget period, funding source, sponsor, personnel, keyword, organization credits, and time.	• Which awards are currently active? • Which awards are past their end dates but weren't closed? • What's the allocated funding amount for each project of an active award? • What's the total funding by department year over year? • What awards have funding unallocated to projects?

The following table lists the currencies supported by each subject area.

Subject Area	Supported Currency
Project Billing - Event Real Time	• Ledger Currency • Entered Currency • Project Currency • Contract Currency
Project Billing - Funding Real Time	Contract Currency
Project Billing - Invoices Real Time	• Ledger Currency • Entered Currency • Project Currency • Contract Currency
Project Billing - Revenue Real Time	• Ledger Currency • Entered Currency • Project Currency • Contract Currency
Project Control - Budgets Real Time	• Ledger Currency • Entered Currency • Project Currency
Project Control - Forecasts Real Time	• Ledger Currency • Entered Currency • Project Currency
Project Control - Progress Real Time	• Ledger Currency

Subject Area	Supported Currency
	• Project Currency
Project Costing - Actual Costs Real Time	• Ledger Currency • Entered Currency • Project Currency The project currency is valid for all measures except for the Transfer Price measures.
Project Costing - Assets Real Time	• Ledger Currency • Entered Currency • Project Currency
Project Costing - Commitments Real Time	• Ledger Currency • Entered Currency • Project Currency
Project Costing - Expenditure Item Performance - Real Time	• Ledger Currency • Entered Currency • Project Currency
Project Costing - Unprocessed Transactions Real Time	• Ledger Currency • Entered Currency • Project Currency
Project Management - Change Management Real Time	Project Currency
Project Management - Opportunity Integration Real Time	Project Currency
Project Management - Planning Real Time	Project Currency
Project Management - Project Issues Real Time	Not Applicable
Project Management - Project Hierarchy Real Time	Project Currency
Project Management - Project Resources Real Time	Not Applicable
Project Management - Project Work Items Real Time	Not Applicable
Project Management - Requirements Real Time	Not Applicable
Project Resource Management - Resource Management Real Time	Project Currency

Subject Area	Supported Currency
Project Resource Management - Resource Pool Real Time	Not Applicable
Project Management - Task Management Real Time	Not Applicable
Projects - Cross Subject Area Analysis - Real Time	• Ledger Currency • Entered Currency • Project Currency • Contract Currency The contract currency is valid only for invoice and revenue related measures.
Projects - Grants Management - Award Analysis Real Time	Not Applicable
Projects - Grants Management - Award Funding Real Time	• Ledger Currency • Entered Currency • Project Currency • Contract Currency

Available Dimensions for Oracle Project Portfolio Management Subject Areas: Overview

Each subject area has a number of dimension folders and one fact folder. The dimension folders contain attribute and hierarchical columns. Dimensions are joined to the fact folder within a subject area. If an analysis you use has the Currency attribute from a dimension folder, you see a currency column in the results. This table describes the dimensions you can use for analyses in Oracle Project Portfolio Management.

Subject Area	Dimensions
Project Billing - Event Real Time	• Billing Event Measures • Currency Exchange Details • Event Details • Event Type • Fiscal Calendar • Organizations • Project • Project Contract Header Details • Project Contract Line Details • Task • Task Hierarchy • Time
Project Billing - Funding Real Time	• Contract Customer Account • Currency Details • Fiscal Calendar

Subject Area	Dimensions
	• Funding Details • Organizations • Project • Project Contract Header Details • Project Contract Line Details • Project Contract Measures • Project Funding Measures • Task • Task Hierarchy • Time
Project Billing - Invoices Real Time	• Award • Bill-to Customer • Bill-to Customer Account • Contract Customer Account • Contract and Project Details • Credits and Write-offs • Currency Exchange Details • Customer Details • Employee • Event Details • Expenditure Item • Expenditure Type • Fiscal Calendar • Institution • Intercompany and Interproject Details • Invoice Calculation • Invoice Details • Invoice Processing • Invoice Transaction Measures • Organizations • Primary Sponsor • Project • Project Contract Header Details • Project Contract Line Details • Receiver Fiscal Calendar • Task • Task Hierarchy • Tax Details • Time
Project Billing - Revenue Real Time	• Accounting Class • Award • Balancing Segment • Contract Customer Account • Contract and Project Details • Cost Center • Currency Exchange Details • Employee • Event Details • Expenditure Item • Fiscal Calendar • GL Accounting Date

Subject Area	Dimensions
	• GL Accounting Date Fiscal Calendar • General Ledger Account • Institution • Intercompany and Interproject Details • Job • Ledger • Legal Entity • Natural Account • Organizations • Primary Sponsor • Project • Project Contract Header Details • Project Contract Line Details • Receiver Fiscal Calendar • Revenue Accounting Details • Revenue Calculation • Revenue Details • Revenue Transaction Measures • Task • Task Hierarchy • Time
Project Control - Budgets Real Time	• Award • Employee • Fiscal Calendar • Institution • Organizations • Primary Sponsor • Project • Project Budget • Project Budget Version • Projects Calendar • Receiver Fiscal Calendar • Resource Class • Task • Task Hierarchy • Time
Project Control - Forecasts Real Time	• Employee • Fiscal Calendar • Forecast Fact • Organizations • Project • Project Forecast Version • Projects Calendar • Receiver Fiscal Calendar • Resource Class • Task • Task hierarchy • Time
Project Control - Progress Real Time	• Organizations • Progress • Progress As Of Date

Subject Area	Dimensions
	• Progress Measures • Project • Project Progress Status • Task
Project Costing - Actual Costs Real Time	• Accounting Class • Adjustment Details • Award • Balancing Segment • Capitalization Details • Cost Accounting Details • Cost Center • Currency Exchange Details • Effort Details • Employee • Expenditure Class • Expenditure Item • Expenditure Item Billing Details • Expenditure Item Revenue Details • Expenditure Item and Cost Distribution Cross-Charge Transaction Details • Expenditure Item and Cost Distribution Details • Expenditure Type • Fiscal Calendar • GL Accounting Date • GL Accounting Date Fiscal Calendar • General Ledger Account • Imported Cost Accounts • Institution • Item • Job • Ledger • Legal Entity • Natural Account • Nonlabor Resource • Organizations • Original Source References • Primary Sponsor • Processing Details • Project • Project Contract Header Details • Project Contract Line Details • Projects Calendar • Receiver Fiscal Calendar • Receiver Ledger Currency Exchange Details • Supplier • Task • Task Hierarchy • Time • Transfer Price Currency Exchange Details • Work Type
Projects Costing - Assets Real Time	• Capital Event • Cost Distribution Line

Subject Area	Dimensions
	• Currency Exchange Details • Expenditure Item • Project • Project Asset • Project Asset Line • Time
Project Costing - Commitments Real Time	• Award • Commitment Details • Currency Details for Commitments • Expenditure Class • Expenditure Type • Institution • Organizations • Primary Sponsor • Project • Projects Calendar • Resource Class • Supplier • Task • Task Hierarchy • Time • Work Type
Project Costing - Expenditure Item Performance - Real Time	• Capitalization Details • Currency Exchange Details • Effort Details • Employee • Expenditure Class • Expenditure Item Billing Details • Expenditure Item Details • Expenditure Item Revenue Details • Expenditure Type • Item • Job • Legal Entity • Nonlabor Resource • Organizations • Original Source References • Processing Details • Project • Project Contract Header Details • Project Contract Line Details • Receiver Ledger Currency Exchange Details • Supplier • Task • Task Hierarchy • Work Type
Project Costing - Unprocessed Transactions Real Time	• Award • Currency Exchange Details for Unprocessed Transactions • Employee • Expenditure Class • Expenditure Type

Subject Area	Dimensions
	• Imported Cost Accounts • Institution • Item • Job • Nonlabor Resources • Organizations • Primary Sponsor • Project • Projects Calendar • Supplier • Task • Task hierarchy • Time • Unprocessed Transactions Adjustment Details • Unprocessed Transactions Details • Unprocessed Transactions Effort Details • Unprocessed Transactions Original Source References • Unprocessed Transactions Processing Details • Work Type
Project Management - Change Management Real Time	• Change Management Measures • Change Order • Project • Time
Project Management - Opportunity Integration Real Time	• Currency Detail • Opportunity • Opportunity Based Measures • Project • Project Plan Dates • Project Planning Measures • Project Progress Status • Time
Project Management - Planning Real Time	• Employee • Milestone • Primary Resource • Primary Task Assignment Resource • Project • Project Plan Dates • Project Plan Details • Project Planning Measures • Project Progress Status • Resource • Resource Class • Sprint • Task • Task Hierarchy • Time
Project Management - Project Issues Real Time	• Action Item Creator • Action Item Details • Action Item Measures • Action Item Owner

Subject Area	Dimensions
	• Action Item Status • Issue Closed Reason • Issue Creator • Issue Details • Issue Measures • Issue Owner • Issue Priority • Issue Status • Issue Type • Project • Time
Project Management - Project Hierarchy Real Time	• Opportunity • Opportunity Based Measures • Project • Project Hierarchy • Project Hierarchy Measures • Project Progress Status • Time
Project Management - Project Resources Real Time	• Employee • Opportunity • Project • Project Resource Details • Project Resource Finish Date • Project Resource Measures • Project Resource Start Date • Project Role • Resource • Resource Assignment Status • Resource Class • Time
Project Management - Project Work Items Real Time	• Project • Task • Task Hierarchy • Time • Work Item Creator • Work Item Details • Work Item Measures • Work Item Owner • Work Item Priority • Work Item Status • Work Item Type
Project Management - Requirements Real Time	• Acceptance Criteria • Backlog Item Details • Backlog Item Measures • Milestone • Owner • Priority • Product • Project • Release

Subject Area	Dimensions
	• Requirement • Requirement Hierarchy • Scrum Master • Spirit • Status • Task • Task Effort Measures
Project Management - Task Management Real Time	• Issue • Milestone • Primary Resource • Project • Project Progress Status • Resource • Tag • Task • Task Creator • Task Dates • Task Follower • Task Management Details • Task Management Measures • Task Owner • Task Type
Project Resource Management - Resource Management Real Time	• Assignment • Project • Project Assignment Dates • Project Request Dates • Project Resource Actuals • Project Resource Assignment • Project Resource Request • Project Resource Supply • Project Resource Utilization • Project Role • Qualification • Request • Resource • Supply • Time
Project Resource Management - Resource Pool Real Time	• Resource • Resource Pool
Projects - Cross Subject Area Analysis - Real Time	• Award • Award Funding Details • Award Funding Measures • Award Project Funding Measures • Bill-to Customer • Budget Transaction Measures • Commitment Transaction Measures • Cost Transaction Measures • Employee • Fiscal Calendar

Subject Area	Dimensions
	• Forecast Transaction Measures • Invoice Transaction Measures • Organizations • Project • Project Contract Header Details • Project Contract Line Details • Reviewer Fiscal Calendar • Resource • Revenue Transaction Measures • Task • Task Hierarchy • Time
Projects - Grants Management - Award Analysis Real Time	• Award • Award Certification Measures • Award Keyword Measures • Award Reference Measures • Certification • Keyword • Project • Reference Type
Projects - Grants Management - Awards Funding Real TIme	• Award • Award Funding Details • Award Funding Measures • Award Keyword Measures • Award Project • Award Project Funding Measures • Fiscal Calendar • Institution • Keyword • Organization Credit • Organizations • Personnel • Primary Sponsor • Project • Project Contract Header Details • Project Contract Line Details • Terms and Conditions • Time

Predefined Analytics for Oracle Project Portfolio Management: Overview

You can use the following predefined analyses and dashboards for your reporting needs. Based on your requirements, you can use these directly or copy and customize them.

Subject Area	Title
Project Billing - Event Real Time	• Project Billing Events • Project Billing - Invoiced Transactions This analysis is also listed under the Project Billing - Invoices Real Time subject area. • Project Revenue - Recognized Transactions This analysis is also listed under the Project Billing - Revenue Real Time subject area.
Project Billing - Funding Real Time	• Project Contract Lines • Project Contract List These analyses are also listed under the Project Billing - Invoices Real Time and Project Billing - Revenue Real Time subject areas.
Project Billing - Invoices Real Time	• Project Contract Lines This analysis is also listed under the Project Billing - Funding Real Time and Project Billing - Revenue Real Time subject areas. • Project Contract List This analysis is also listed under the Project Billing - Funding Real Time and Project Billing - Revenue Real Time subject areas. • Project Billing - Invoiced Transactions This analysis is also listed under the Project Billing - Event Real Time subject area. • Project Billing - Invoice Lines • Invoices by Status
Project Billing - Revenue Real Time	• Project Revenue - Recognized Transactions This analysis is also listed under the Project Billing - Event Real Time subject area. • Project Revenue - Contract Lines • Revenue by Contract • Project Income Statement This analysis is also listed under the Project Costing - Actual Costs Real Time subject area. • Project Contract Lines This analysis is also listed under the Project Billing - Invoices Real Time and Project Billing - Funding Real Time subject areas. • Project Contract List This analysis is also listed under the Project Billing - Invoices Real Time and Project Billing - Funding Real Time subject areas.
Project Control - Budgets Real Time	• Budget vs Actual Cost Comparison This analysis is also listed under the Project Costing - Actual Costs Real Time subject area. • Project Tasks

Subject Area	Title
	• Project List
Project Costing - Actual Costs Real Time	• Project Income Statement This analysis is also listed under the Project Billing - Revenue Real Time subject area. • Budget vs Actual Cost Comparison This analysis is also listed under the Project Control - Budgets Real Time subject area. • Project Cost Account Reconciliation • Project Cost by Transaction Source Details • Project Cost by Transaction Source • Project Expenditure Items This analysis is also listed under the Project Costing - Commitments Real Time subject area. • Project Capital Costs This analysis is also listed under the Project Costing - Commitments Real Time subject area.
Project Costing - Assets Real Time	• Capital Expenditures • Uncapitalizable Cost for Capitalizable Tasks • Capital Asset Assignments • Capital Asset Lines • Capital Assets
Project Costing - Commitments Real Time	• Project Expenditure Items • Project Capital Costs These analyses are also listed under the Project Costing - Actual Costs Real Time subject area.
Project Management - Change Management Real Time	• Change Orders by Participant Status • Change Orders by Reason • Change Order Details • Pending Change Orders Summary
Project Management - Planning Real Time	• Tasks Scheduled Outside of Resource Assignment Dates This analysis is also listed under the Project Management - Project Resources Real Time subject area. • Resource Allocation and Task Assignment Comparison by Week This analysis is also listed under the Project Management - Planning Real Time subject area. • Project Cost Variance • Planned and Actual Project Labor Comparison • Actual Project Labor Margin
Project Management - Project Issues Real Time	• Action Item Details • Closed Issue Analysis • Detail of Open Issues • Issue Analysis by Project • Issues Aging • Issues by Type • Issue Details • My Open Action Items • My Open Issues • Open Action Items by Project
Project Management - Project Hierarchy Real Time	• Delegate Access Analysis • Owner Access Analysis • Remaining Project Hours • Total and Actual EPS Node Cost

Subject Area	Title
	• Total Project Hours
Project Management - Project Resources Real Time	• Tasks Scheduled Outside of Resource Assignment Dates This analysis is also listed under the Project Management - Planning Real Time subject area. • Resource Allocation and Task Assignment Comparison by Week This analysis is also listed under the Project Management - Planning Real Time subject area. • Placeholder Resources on My Projects • Resources Currently on My Projects
Project Management - Project Work Items Real Time	• Deliverables Due in My Projects • Deliverables Not Started in My Projects • All Work Items in My Projects
Project Management - Requirements Real Time	• Backlog Completeness Check Analysis • Backlog Item Sprint Velocity Analysis • Backlog Items Status Analysis • Project Hours by Backlog Item Analysis
Project Resource Management - Resource Management Real Time	• Projected Revenue Shortfall by Resource • Requested Resource Forecast Revenue Details • Project Resource Request Forecast Revenue • Resource Pool Projected and Actual Utilization by Resource • Resource Pool Actual Utilization by Resource and Month • Resource Capacity Planning by Project Role
Project Management - Task Management Real Time	• Project Work Coming Due • My Upcoming Tasks
Projects - Cross Subject Area Analysis - Real Time	Actual Cost Analysis by Resource Type
Projects - Grants Management - Award Funding Real Time	• Award Project Funding Details • Award List

Assets

Project Capital Costs Analysis: Explained

This topic provides an overview of the Project Capital Costs analysis.

Overview

The Project Capital Costs analysis displays actual and committed costs for capital projects, including capitalization details. You can drill down to project expenditure items from this analysis.

Key Insights

This report answers the following business questions:

- What are the actual and committed costs incurred by my capital projects?
- How much of this cost is capitalizable?
- How much of this cost is already capitalized?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Project Accountant • Project Manager
When do I use this report?	When you need to know how much of the actual and committed costs for a capital project is capitalizable and how much of these costs is already capitalized.

What can I do with this report?	You can:
	• View the list of projects by:
	  ◦ Project Business Unit
	  ◦ Project Organization
	  ◦ Project Status
	• Drill down to the Project Expenditure Items analysis using the Total Cost column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Costing - Actual Costs Real Time and Project Costing - Commitment Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Business Unit	• "Project"."Project Business Unit" • Excluded from view
Project Organization	• "Project"."Organization Name" • Excluded from view
Project Number	"Project". "Project Number"
Currency Code	"Currency Exchange Details". "Apps Common Currency Code"

Selected Column	Source and Customized Properties
	union joins with "Currency Details for Commitments". "Apps Common Currency Code"
Project Status	• "Project"."Current Project Status Name" • Excluded from view
Enable Capitalization	• "- Project Type Attributes"."Project Capitalizable Flag" • Excluded from view
Template	• "- Project Indicator Attributes"."Template Flag" • Excluded from view
Capitalizable Flag	• "Capitalization Details"."Capitalizable Flag" union joins with "Commitment Details"."Capitalizable Flag" • Excluded from view
Capitalized	• "Capitalization Details"."Expenditure Item Capitalization Distribution Flag" union joins with 'N' • Excluded from view
Transaction Number	• "Expenditure Item"."Expenditure Item" union joins with "Commitment Details"."Commitment Number" • Excluded from view
Total Cost	• "- Expenditure Item and Cost Distribution Measures"."Cost" union joins with "- Commitment Cost Measures"."Total Committed Cost" • Action link to the Project Expenditure Items analysis
Expenditure Item	• "Capitalization Details"."Expenditure Item Capitalizable Flag" union joins with "Commitment Details"."Capitalizable Flag" • Excluded from view
Cost Type	• 'Actuals' union joins with "Commitment Details"."Commitment Type" • Excluded from view
Actual Cost	• Calculated measure • If cost type is actual then equals total cost else 0 • Default sum
Purchase Requisition	• Calculated measure • If cost type is purchase requisition then equals total cost else 0 • Default sum
Purchase Order	• Calculated measure • If cost type is purchase order then equals total cost else 0

Selected Column	Source and Customized Properties
	• Default sum
Supplier Invoice	• Calculated measure • If cost type is supplier invoice then equals total cost else 0 • Default sum
Capitalizable Total Cost	• Calculated measure • If expenditure item is capitalizable then equals total cost else 0 • Default sum
Capitalizable Actual Cost	• Calculated measure • If expenditure item is capitalizable and cost type is actual then equals total cost else 0 • Default sum
Capitalizable Committed Cost	• Calculated measure • Displays the difference between total cost and capitalizable actual cost. • Default sum
Capitalized Cost	• Calculated measure • Displays the difference between total cost and capitalizable total cost. • Default sum

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Business Unit	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Project Organization	Dashboard prompt	• Choice list • Values limited by Project Business Unit • Select multiple values enabled • Default selection: All values
Project Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection specific value: Approved
Enable Capitalization	Filter	Equals 'Y'
Template	Filter	Not 'Y'

The following table lists the views in the report.

View	Displayed Information
View Name	Project Capital Costs
View Sections	None

View	Displayed Information
Table Column and Measures	1. Project a. Project Number b. Currency Code 2. Total Cost 3. Actual Cost 4. Committed Costs a. Purchase Requisition b. Purchase Order c. Supplier Invoice 5. Capitalization Details a. Capitalizable Total Cost b. Capitalizable Actual Cost c. Capitalizable Committed Cost d. Capitalized Cost

Project Expenditure Items Analysis: Explained

This topic provides an overview of the Project Expenditure Items analysis.

Overview

The Project Expenditure Items analysis displays the total cost of a capital project included in the Project Capital Costs analysis by task and expenditure item. You can drill down to the Project Expenditure Items analysis by clicking on the Total Cost column data on the Project Capital Costs analysis.

Key Insights

This report answers the following business question:

Which expenditure items and commitments are associated with my capital projects?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Project Capital Cost
Who uses this report?	• Project Accountant • Project Manager
When do I use this report?	When you need to review the expenditure items and commitments for a capital project.
What can I do with this report?	You can review: • Expenditure items for your capital project.

FAQ	Answer
	• Commitments for your capital project.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Costing - Actual Costs Real Time and Project Costing - Commitment Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Number	"Project". "Project Number"
Project Name	• "Project"."Project Name" • Excluded from view
Transaction Number	cast("Expenditure Item". "Expenditure Item" as char) union joins with "Commitment Details". "Commitment Number"
Cost	"- Expenditure Item and Cost Distribution Measures". "Cost" union joins with "- Commitment Cost Measures". "Total Committed Cost"
Capitalizable	CASE "Capitalization Details". "Expenditure Item Capitalizable Flag" WHEN 'Y' THEN 'Yes' ELSE 'No' END union joins with CASE "Commitment Details". "Capitalizable Flag" WHEN 'Y' THEN 'Yes' ELSE 'No' END
Capitalized	Case "Capitalization Details". "Expenditure Item Capitalization Distribution Flag" WHEN 'Y' THEN 'Yes' ELSE 'No' END union joins with 'No'
Cost Type	'Actuals' union joins with "Commitment Details". "Commitment Type Name"
Currency Code	"Currency Exchange Details". "Apps Common Currency Code" union joins with

Selected Column	Source and Customized Properties
	"Currency Details for Commitments". "Apps Common Currency Code"
Expenditure Type	"Expenditure Type". "Resource Type Name"
Expenditure Item Creation Date	"- Expenditure Item and Cost Distribution Record Information". "Expenditure Item Creation Date" union joins with "- Commitment Record Information". "Creation Date"
Expenditure Organization	"- Expenditure Owning Organization". "Expenditure Organization Name" union joins with "Commitment Details". "Organization Name"
Task Number	"Task"."Task Number"
Task Name	"Task"."Task Name"
Project Manager	"Project". "Current Project Manager"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Prompt	• Prompted • Default value: 001 VKD Capital Project

The following table lists the views in the report.

View	Displayed Information
View Name	Project Expenditure Items
View Sections	Currency Code
Table Column and Measures	1. Project Number 2. Project Manager 3. Task Number 4. Task Name 5. Transaction Number 6. Cost 7. Cost Type 8. Capitalizable 9. Capitalized 10. Expenditure Type 11. Expenditure Item Creation Date

View	Displayed Information
	12. Expenditure Organization

Capital Asset Assignments Analysis: Explained

This topic provides an overview of the Capital Asset Assignments analysis.

Overview

The Capital Asset Assignments analysis displays how your assets and asset costs are assigned to your projects and tasks.

Key Insights

This report answers the following business questions:

- What's the total cost of assets assigned at the project level?
- Which assets are assigned to a task?
- Which assets aren't assigned?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Accountant
When do I use this report?	When you need to: • Review how assets are assigned to projects and tasks. • Group your assets by asset type and category.

What can I do with this report?	You can view:
	• Assets grouped by
	    ◦ Asset type
	    ◦ Asset category
	• Costs for these asset groups.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Assets Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Number	"Project". "Project Number"
Project Name	"Project". "Project Name"
Asset Task - Task Number	"Asset Task"."Asset Task - Task Number"
Asset Task - Task Name	"Asset Task"."Asset Task - Task Name"
Grouping Level Type	"Project Asset"."Asset Grouping Level Type"
Asset Number	"Project Asset"."Asset Number"
Asset Name	"Project Asset"."Asset Name"
Asset Key	"Project Asset"."Asset Id"
Asset Category	"Project Asset"."Asset Category"
Asset Type	"Project Asset"."Asset Type"
Estimated Units	• "Asset Measures"."Estimated Asset Units" • Value suppression: Repeat
Actual Units	• "Asset Measures"."Actual Asset Units" • Value suppression: Repeat
Estimated Asset Cost	• "Asset Measures"."Estimated Asset Cost" • Value suppression: Repeat
Asset Cost	• "Asset Line Measures"."Rounded Grouped Cost" • Value suppression: Repeat
Currency	"Currency Exchange Details". "Apps Common Currency Code"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection SQL:

Filter on Column	Type	Rules
		select min("Project"."Project Number") from "Project Costing - Assets Real Time"
Asset Category	Dashboard prompt	• Choice list • Select multiple values enabled
Task Number	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Task Name	Dashboard prompt	• Choice list • Select multiple values enabled
Grouping Level Type	Dashboard prompt	• Choice list • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Capital Asset Assignments
View Sections	None
Table Column and Measures	1. Project Number 2. Project Name 3. Asset Category 4. Asset Type 5. Grouping Level Type 6. Asset Number 7. Asset Name 8. Asset Key 9. Currency 10. Estimated Units 11. Actual Units 12. Estimated Asset Cost 13. Asset Cost 14. Asset Task - Task Number 15. Asset Task - Task Name

Capital Asset Lines Analysis: Explained

This topic provides an overview of the Capital Asset Lines analysis.

Overview

The Capital Asset Lines analysis displays the expenditure items and cost distributions that are allocated and assigned to an asset in a given period.

Key Insights

This report answers the following business questions:

- Which asset lines contribute to my assets?
- What's the total capitalized cost of my assets?
- How's an expenditure item allocated across assets?
- Which cost distributions are included in an asset line?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Accountant
When do I use this report?	When you need to: • Perform detailed analysis to determine which expenditure items and cost distribution lines are allocated and assigned to an asset in a given period. • Review how expenditure items are grouped into asset lines.
What can I do with this report?	You can review and analyze: • The asset lines that contribute to your total assets. • You total capitalized and CIP cost.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Assets Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Capital Event Number	"Capital Event". "Capital Event Number"
Asset Line Number	"Project Asset Line". "Project Asset Line Id#1"
Asset Period	"Project Asset Line"."FA Period Name"
Asset Number	"Project Asset"."Asset Number"

Selected Column	Source and Customized Properties
Asset Name	"Project Asset"."Asset Name"
Asset Category	"Project Asset"."Asset Category"
Asset Line Task Number	"Asset Line Task"."Asset Line Task - Task Number"
Asset Line Task Name	"Asset Line Task"."Asset Line Task - Task Name"
Expenditure Organization	"Expenditure Item". "Expenditure Organization"
Transaction Number	"Expenditure Item". "Expenditure Item"
Transaction Date	"Expenditure Item". "Expenditure Item Date"
Expenditure Type	"Expenditure Type". "Resource Type Name"
Distribution Line Number	"Cost Distribution Line". "Distribution Line Num"
Currency	"Currency Exchange Details". "Apps Common Currency Code"
Capitalized Cost	• "Asset Line Measures"."Rounded Capitalized Cost" • Value suppression: Repeat
CIP Cost	• "Asset Line Measures"."Rounded Grouped CIP Cost" • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection SQL: select min("Project"."Project Number") from "Project Costing - Assets Real Time"
Capital Event Number	Dashboard prompt	• Choice list • Select multiple values enabled
Transaction Number	Dashboard prompt	• Choice list • Select multiple values enabled
Asset Number	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Asset Line Number	Dashboard prompt	• Choice list

Filter on Column	Type	Rules
		• Select multiple values enabled
Accounting Period	Dashboard prompt	• Choice list • Required • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Capital Asset Lines
View Sections	None
Table Column and Measures	1. Asset Category 2. Capital Event Number 3. Asset Number 4. Asset Name 5. Asset Line Number 6. Asset Line Task Number 7. Asset Line Task Name 8. Expenditure Organization 9. Asset Period 10. Transaction Number 11. Transaction Date 12. Expenditure Type 13. Distribution Line Number 14. Currency 15. Capitalized Cost 16. CIP Cost

Capital Assets Analysis: Explained

This topic provides an overview of the Capital Assets analysis.

Overview

The Capital Assets analysis displays the details of your capital assets.

Key Insights

This report answers the following business questions:

- Which assets are built and placed in service?
- Which assets don't have a complete asset definition?
- What's the total cost of each asset?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Accountant
When do I use this report?	When you need to: • Review the assets created for a project. • Ensure that all assets are defined and that the asset attributes are correct.
What can I do with this report?	You can review: • Actual asset in-service date • Number of asset units • Total asset cost
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Assets Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Asset Number	"Project Asset"."Asset Number"
Asset Name	"Project Asset"."Asset Name"
Asset Key	"Project Asset"."Asset Id"
Asset Category	"Project Asset"."Asset Category"
Asset Book	"Project Asset"."Asset Book Name"
Book Currency	"Project Asset"."Asset Book Currency"
Standard Unit Cost	"Project Asset"."Asset Category Standard Unit Cost"
Asset Type	"Project Asset"."Asset Type"

Selected Column	Source and Customized Properties
Estimated In-Service Date	"Project Asset". "Estimated In Service Date"
Actual In-Service Date	"Project Asset". "Placed in Service Date"
Estimated Units	• "Asset Measures"."Estimated Asset Units" • Value suppression: Repeat
Actual Units	• "Asset Measures"."Actual Asset Units" • Value suppression: Repeat
Estimated Asset Cost	• "Asset Measures"."Estimated Asset Cost" • Value suppression: Repeat
Currency	"Currency Exchange Details". "Apps Common Currency Code"
Total Asset Cost	• "Asset Line Measures"."Rounded Grouped Cost" • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection SQL: select min("Project"."Project Number") from "Project Costing - Assets Real Time"
Task Number	Dashboard prompt	• Choice list • Select multiple values enabled
Task Name	Dashboard prompt	• Choice list • Select multiple values enabled
Asset Category	Dashboard prompt	• Choice list • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Capital Assets
View Sections	None
Table Column and Measures	1. Asset Category 2. Asset Type 3. Asset Number

View	Displayed Information
	4. Asset Key 5. Asset Name 6. Estimated In-Service Date 7. Actual In-Service Date 8. Asset Book 9. Book Currency 10. Estimated Units 11. Actual Units 12. Currency 13. Standard Unit Cost 14. Estimated Asset Cost 15. Total Asset Cost

Noncapitalizable Cost for Capitalizable Tasks Analysis: Explained

This topic provides an overview of the Noncapitalizable Cost for Capitalizable Tasks analysis.

Overview

The Noncapitalizable Cost for Capitalizable Tasks analysis displays the noncapitalizable cost for your capitalizable project tasks.

Key Insights

This report answers the following business questions:

- What are the total costs for my capitalizable tasks?
- What percentage of my task costs is not capitalizable?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Accountant
When do I use this report?	When you need to: • Review charges that are expensed for capitalizable tasks. • Ensure that costs are classified correctly and that expenses charged to the task are appropriate.
What can I do with this report?	You can review: • Total costs for your project tasks. • Percentage of total task costs that's not capitalizable.

FAQ	Answer
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Assets Real Time subject area.

Report Details

The following table lists the selected columns underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Expenditure Task Number	"Task"."Task Number"
Expenditure Task Name	"Task"."Task Name"
Task Manager	"Task"."Task Manager Name"
Expenditure Type	"Expenditure Type". "Resource Type Name"
Currency	"Currency Exchange Details". "Apps Common Currency Code"
Expense Cost	• "Cost Distribution Measures"."Noncapitalizable Cost" • Value suppression: Repeat
Total Task Cost	• "Cost Distribution Measures"."Cost" • Value suppression: Repeat
Percent of Total Cost	• Formula customized as: "Cost Distribution Measures"."Noncapitalizable Cost"/"Cost Distribution Measures"."Cost" • Value suppression: Repeat • Data format: Percentage
Expenditure Organization	"Expenditure Item". "Expenditure Organization"
Transaction Number	"Expenditure Item". "Expenditure Item"
Transaction Date	• "Expenditure Item"."Expenditure Item Date" • Custom date format: d-MMM-yyyy h:mm t

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection SQL:

Filter on Column	Type	Rules
		select min("Project"."Project Number") from "Project Costing - Assets Real Time" • Default value: Burd_2701Proj
Expenditure Organization	Dashboard prompt	• Choice list • Select multiple values enabled
Project Accounting Period	Dashboard prompt	• Choice list • Required • Select multiple values enabled
Project Name	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Noncapitalized Cost for Capitalizable Tasks
View Sections	None
Table Column and Measures	1. Transaction Date 2. Expenditure Organization 3. Task Manager 4. Expenditure Task Number 5. Expenditure Task Name 6. Transaction Number 7. Expenditure Type 8. Currency 9. Expense Cost 10. Total Task Cost 11. Percent of Total Cost

Capital Expenditures Analysis: Explained

This topic provides an overview of the Capital Expenditures analysis.

Overview

The Capitalizable Expenditures analysis displays the capital expenditure items for your assets.

Key Insights

This report answers the following business questions:

- What's the total capitalized cost of my assets?
- How's an expenditure item allocated across assets?

- Which cost distributions are included in an asset line?
- Which assets are assigned to a task?
- Which assets aren't assigned?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to: • View and understand where expenditures are in the capitalization process. • Identify activities that must be performed or issues that must be addressed.
What can I do with this report?	You can review the following for your assets: • Ungrouped cost • Unassigned cost • Assigned cost • Transferred cost • Capitalized cost
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Assets Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Expenditure Task Number	"Task"."Task Number"
Expenditure Task Name	"Task"."Task Name"
Expenditure Type	"Expenditure Type". "Resource Type Name"
Transaction Number	"Expenditure Item". "Expenditure Item"
Distribution Line Number	"Cost Distribution Line". "Distribution Line Num"

Selected Column	Source and Customized Properties
Capital Event Number	"Capital Event". "Capital Event Number"
Asset Line Number	"Project Asset Line". "Project Asset Line Id#1"
Asset Period	"Project Asset Line"."FA Period Name"
Asset Number	"Project Asset"."Asset Number"
Currency	"Currency Exchange Details". "Apps Common Currency Code"
Ungrouped Cost	• "Cost Distribution Measures"."Common Capitalizable Cost" • Value suppression: Repeat
Unassigned Cost	• "Asset Line Measures"."Unrounded Unassigned CIP Cost" • Value suppression: Repeat
Assigned Cost	• "Asset Line Measures"."Unrounded Assigned CIP Cost" • Value suppression: Repeat
Transferred Cost	• "Asset Line Measures"."Unrounded Transferred CIP Cost" • Value suppression: Repeat
Capitalized Cost	• "Asset Line Measures"."Unrounded Capitalized Cost" • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection SQL select min("Project"."Project Number") from "Project Costing - Assets Real Time"
Project Name	Filter	Prompted
Task Number	Dashboard prompt	• Choice list • Select multiple values enabled
Task Name	Dashboard prompt	• Choice list • Select multiple values enabled
Project Accounting Period Name	Dashboard prompt	• Choice list • Required • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Capital Expenditures
View Sections	None
Table Column and Measures	1. Expenditure Task Number 2. Expenditure Task Name 3. Expenditure Type 4. Transaction Number 5. Distribution Line Number 6. Capital Event Number 7. Asset Line Number 8. Asset Period 9. Asset Number 10. Currency 11. Ungrouped Cost 12. Unassigned Cost 13. Assigned Cost 14. Transferred Cost 15. Capitalized Cost

CIP Account Analysis: Explained

This topic provides an overview of the Construction-In-Process Account Analysis.

Overview

The CIP Account Analysis displays capitalizable costs by the construction-in-process account. You can use this analysis to reconcile costs with the general ledger.

Key Insights

The report answers the following business questions:

- Do the capitalizable costs in Oracle Fusion Project Costing reconcile with the account balances in the general ledger?
- What are the CIP assets assigned to a project?
- What's the total cost of the CIP assets?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics pane - Shared Folders - Projects - Project Financial Sample Reports
Who uses this report?	Project Accountant

FAQ	Answer
When do I use this report?	When you need to view the details of the construction-in-process assets.
What can I do with this report?	You can: • View all project costs charged to a CIP account. • Reconcile CIP balances with the general ledger. • Investigate discrepancies within a CIP account. • Provide supporting documentation of CIP accounts to internal and external auditors.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Assets Real Time subject area.

Report Details

The following table lists the selected columns, underlying formula, and customized column properties for the report.

Selected Column	Source and Customized Properties
CIP Balancing Segment	"Balancing Segment". "Balancing Segment Code"
CIP Cost Center	"Cost Center"."Cost Center Code"
CIP Natural Account	"Natural Account". "Account Code"
CIP Account	"General Ledger Account". "Concatenated Segments"
Legal Entity	"Expenditure Item". "Expenditure Item Provider Legal Entity Name"
Transaction Number	"Expenditure Item". "Expenditure Item"
Transaction Date	"Expenditure Item". "Expenditure Item Date"
Project Number	"Project". "Project Number"
Project Name	"Project". "Project Name"
Task Number	"Task"."Task Number"
Task Name	"Task"."Task Name"
Cost Distribution Line	• "Cost Distribution Line"."Distribution Line Num" • Value Suppression: Repeat
Asset Number	"Project Asset"."Asset Number"

Selected Column	Source and Customized Properties
Currency	• "Currency Exchange Details"."Apps Common Currency Code" • Value Suppression: Repeat
Cost	• IFNULL("Asset Line Measures"."Unrounded Grouped Cost",0) • Value Suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Expenditure Business Unit	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT MIN("Expenditure Item"."Expenditure Business Unit Name") FROM "Project Costing - Assets Real Time" FETCH FIRST 65001 ROWS ONLY
Project Number	Dashboard prompt	• Choice list • Select multiple values enabled
CIP Account	Dashboard prompt	• Choice list • Select multiple values enabled
CIP Company	Dashboard prompt	• Choice list • Select multiple values enabled
CIP Cost Center	Dashboard prompt	• Choice list • Select multiple values enabled
CIP Natural Account	Dashboard prompt	• Choice list • Select multiple values enabled
Accounting Period	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT MAX("Projects Calendar"."Project Period")FROM "Project Costing - Assets Real Time" FETCH FIRST 65001 ROWS ONLY

The following table lists the views in the report.

View	Displayed Information
View Name	CIP Account Analysis
View Sections	None
Table Column and Measures	1. CIP Balancing Segment

View	Displayed Information
	2. CIP Cost Center 3. CIP Natural Account 4. CIP Account 5. Legal Entity 6. Project Name 7. Project Number 8. Task Number 9. Task Name 10. Transaction Number 11. Transaction Date 12. Cost Distribution Line 13. Asset Number 14. Currency 15. Cost

Project Costing - Assets Real Time Measures: Explained

This topic provides an overview of the measures available in the Project Costing - Assets Real Time subject area. The measures are populated when accounting currency is set as the preferred currency in Oracle Transactional Business Intelligence.

Cost Distribution Line Measures

The following measures appear in the ledger currency. Similar measures are available for the transaction currency.

Measure	Description
Cost	Raw cost if raw cost is capitalized. Total burdened cost if burdened cost is capitalized.
Raw Cost	Raw cost of the cost distribution.
Burden Cost	Burden cost of the cost distribution.
Noncapitalizable Cost	Raw cost if the expenditure item is noncapitalizable and raw cost is capitalized. Total burdened cost if the expenditure item is noncapitalizable and burdened cost is capitalized.
Capitalizable Cost	Raw cost if the expenditure item is capitalizable and raw cost is capitalized. Total burdened cost if the expenditure item is capitalizable and burdened cost is capitalized.
Common Capitalizable Cost	Capitalizable cost that's charged to a task or project where the asset grouping level type is Common Costs.
Ungrouped Capitalizable Cost	Capitalizable cost that's not grouped into an asset line. The total noncapitalized or CIP amount of a cost distribution line is the sum of the cost distribution Ungrouped Capitalizable Cost and the asset line Grouped CIP Cost.

Asset Line Measures

The following measures appear in the ledger currency. Measures are available for both rounded and unrounded costs. The rounded amounts are rounded to 2 decimal places.

Measure	Description
Original Asset Cost	Cost of the asset line before it's split.
Grouped Cost	Current cost of the asset line after it's split. This measure includes CIP and capitalized costs.
Grouped CIP Cost	Current cost of the asset line that's not capitalized in Oracle Fusion Assets. This measure includes amounts that are transferred to Oracle Fusion Assets but aren't capitalized. The total CIP amount of a cost distribution line is the sum of the cost distribution Ungrouped Capitalizable Cost and the asset line Grouped CIP Cost.
Unassigned CIP Cost	Current cost of a common cost asset line that's not allocated to an asset.
Assigned CIP Cost	Current cost of the asset line that's assigned to an asset but not transferred to Oracle Fusion Assets.
Transferred CIP Cost	Current cost of the asset line that's transferred to Oracle Fusion Assets but not capitalized.
Rejected CIP Cost	Current cost of the asset line that was transferred to Oracle Fusion Assets but rejected.
Capitalized Cost	Current cost of the asset line that's transferred and capitalized in Oracle Fusion Assets.

Project Billing

Invoices by Status Analysis: Explained

This topic provides an overview of the Invoices by Status analysis.

Overview

The Invoices by Status analysis displays invoices for the selected billing type, accounting period, and invoice status. Results are ordered by invoice date, contract number, and invoice number. You can drill down to the invoice lines and invoiced transactions from this analysis.

Key Insights

This report answers the following business questions:

- Which invoices need attention?
- What are the invoice line details for a particular invoice?

- Which transactions are included in the invoice?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Grants Accountant • Project Billing Specialist
When do I use this report?	When there's an invoice which needs attention.

What can I do with this report?	You can:
	• View invoices in this analysis by:
	  ◦ Accounting Period
	  ◦ Billing Type
	  ◦ Invoice Status
	• Drill down to the:
	  ◦ Project Billing - Invoice Lines analysis using the Invoice Amount column.
	  ◦ Project Billing - Invoiced Transactions analysis using the Invoice Amount column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Billing - Invoices Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Invoice Date	"- Invoice Dates". "Invoice Date"
Contract Number	"Project Contract Header Details". "Contract Number"
Invoice Number	• "Invoice Details"."Invoice Number" • Action link to the Project Billing - Invoice Lines analysis
Invoice Status	"Invoice Details". "Invoice Status"
Receivables Invoice Number	"Invoice Details"."AR Invoice Number"

Selected Column	Source and Customized Properties
Bill-to Customer	"- Bill-to Customer Details". "Billed Account Name"
Invoice Type	"Invoice Details". "Invoice Type"
Credit Invoice Number	Formula customized as: IFNULL("Credits and Write-offs". "Header Credit Invoice Number", '')
Invoice Amount	• Formula customized as: IFNULL("Invoice Transaction Measures"."External Project Invoice Amount in Invoice Currency", IFNULL("Invoice Transaction Measures"."Intercompany Invoice Amount in Invoice Currency", IFNULL("Invoice Transaction Measures"."Interproject Invoice Amount in Invoice Currency", 0))) • Action link to the: ◦ Project Billing - Invoice Lines analysis ◦ Project Billing - Invoiced Transactions analysis
Invoice Currency	"Currency Exchange Details". "Apps Document Currency Code"
Billing Type	• "Invoice Details"."Project Billing Type Code" • Excluded from view
Accounting Period Name	• "Fiscal Calendar"."Fiscal Period" • Excluded from view

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Billing Type	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Accounting Period	Dashboard prompt	• Choice list • Values limited by All Prompts • Select multiple values enabled • Default selection: All values
Invoice Status	Dashboard prompt	• Choice list • Values limited by All Prompts • Select multiple values enabled • Default selection: All values

The following table lists the views in the report.

View	Displayed Information
View Name	Project Billing - Invoices by Status

View	Displayed Information
View Sections	None
Table Column and Measures	1. Invoice Date 2. Contract Number 3. Invoice Number 4. Invoice Status 5. Receivables Invoice Number 6. Bill-to Customer 7. Invoice Type 8. Credit Invoice Number 9. Invoice Amount 10. Invoice Currency

Project Billing Events Analysis: Explained

This topic provides an overview of the Project Billing Events analysis.

Overview

The Project Billing Events analysis displays the project contract billing events at an individual transaction level.

Key Insights

This report answers the following business questions:

- Which are the billing events for a project or contract and contract line?
- Which billing events are missing an event completion date?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know the details of the billing events for a project or contract.
What can I do with this report?	You can: • View the billing event details for different invoice and revenue statuses. • View the billing details based on the billing event completion date. • Drill down to the Project Billing - Invoiced Transactions Analysis using the Invoiced Amount column. • Drill down to the Project Revenue - Recognized Transactions Analysis using the Recognized Amount column.
What type of report is this?	Oracle Transactional Business Intelligence

FAQ	Answer

Related Subject Area

This report uses the Project Billing - Event Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Event Completion Date	• "Event Details"."Completion Date" • Column data displayed in custom date format as M/d/yy h:mm t
Event Type	"Event Details". "Event Type"
Revenue Status	"Event Details". "Event Revenue Status"
Invoice Status	"Event Details". "Event Invoice Status"
Project Number	"Project". "Project Number"
Contract Number	"Project Contract Header Details". "Contract Number"
Event Amount	• Formula customized as: IFNULL("Billing Event Measures"."Event Amount", 0) • Value suppression: Repeat • Column data displayed in number format with negative values allowed
Invoiced Amount	• Formula customized as: IFNULL("Billing Event Measures"."Invoiced Amount in Contract Currency", 0) • Value suppression: Repeat • Column data displayed in number format with negative values allowed • Action link to the Project Billing - Invoiced Transactions Analysis using the Invoiced Amount column.
Recognized Amount	• Formula customized as: IFNULL("Billing Event Measures"."Recognized Revenue in Contract Currency", 0) • Value suppression: Repeat • Column data displayed in number format with negative values allowed • Action link to the Project Revenue - Recognized Transactions Analysis using the Recognized Amount column.
Unbilled Amount	• Formula customized as: IfNull("Billing Event Measures"."Unbilled Event Amount in Contract Currency",0) • Value suppression: Repeat • Column data displayed in number format with negative values allowed
Unrecognized Amount	• Formula customized as: IfNull("Billing Event Measures"."Unrecognized Event Amount in Contract Currency",0)

Selected Column	Source and Customized Properties
	• Value suppression: Repeat • Column data displayed in number format with negative values allowed
Contract Currency	"Currency Exchange Details". "Apps Common Currency Code"
Contract Line Number	"Project Contract Line Details". "Contract Line Number"
Task Number	"Task"."Task Number"
Use for Invoices	"Event Type"."Event Type Invoice Flag"
Use for Revenue	"Event Type"."Event Type Revenue Flag"

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Business Unit	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Event Usage	Dashboard prompt	• Choice list • Default selection: Custom Values
Invoice Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Revenue Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Completion Date On or Before	Dashboard prompt	• Calendar • Default selection SQL Results: SELECT MAX("Event Details"."Completion Date") FROM "Project Billing - Event Real Time"

The following table lists the views in the report.

View	Displayed Information
View Name	Project Billing Events Analysis
View Sections	None
Table Column and Measures	1. Contract Number 2. Contract Line Number 3. Project Number

View	Displayed Information
	4. Task Number 5. Use for Invoices 6. Use for Revenue 7. Revenue Status 8. Event Type 9. Event Completion Date 10. Event Amount 11. Contract Currency 12. Invoiced Amount 13. Unbilled Amount 14. Recognized Amount 15. Unrecognized Amount

Project Billing - Invoiced Transactions Analysis: Explained

This topic provides an overview of the Project Billing - Invoiced Transactions analysis.

Overview

The Project Billing - Invoiced Transactions analysis lists invoiced transactions for an invoice line in the Invoice Lines analysis. The results are ordered by contract line number and transaction number. You can drill down to the Project Billing - Invoiced Transactions analysis by clicking on the Invoice Amount column data on the Invoices by Status analysis.

Key Insights

This report answers the following business question:

What are the transactions for an invoice line?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Invoices by Status
Who uses this report?	• Grants Accountant • Project Billing Specialist
When do I use this report?	When you need to review the transactions for an invoice line.
What can I do with this report?	Review invoiced transactions.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Billing - Invoices Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Contract Number	"Project Contract Header Details". "Contract Number"
Invoice Number	"Invoice Details". "Invoice Number"
Invoice Line Number	"Invoice Details". "Invoice Line Number"
Contract Line Number	"Project Contract Line Details". "Contract Line Number"
Transaction Type	"Invoice Calculation". "Distribution Bill Transaction Type Name"
Event Number	"Invoice Calculation". "Event Number"
Expenditure Type	"Expenditure Type". "Resource Type Name"
Person	"Employee". "Employee Name"
Bill Rate	"Invoice Calculation". "Distribution Bill Rate"
Project Number	"Project". "Project Number"
Task Number	"Task"."Task Number"
Invoice Amount	Formula customized as: IFNULL("Invoice Transaction Measures". "External Project Invoice Amount in Invoice Currency",0)+ IFNULL("Invoice Transaction Measures". "Intercompany Invoice Amount in Invoice Currency",0)+ IFNULL("Invoice Transaction Measures". "Interproject Invoice Amount in Invoice Currency",0)
Invoice Currency	"Currency Exchange Details". "Apps Document Currency Code"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Contract Number	Filter	Prompted
Billing Type	Filter	Prompted

Filter on Column	Type	Rules
Accounting Period Name	Filter	Prompted
Invoice Status	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Invoiced Transactions
View Sections	None
Table Column and Measures	1. Contract Number 2. Contract Line Number 3. Invoice Number 4. Invoice Line Number 5. Transaction Type 6. Event Number 7. Expenditure Type 8. Person 9. Bill Rate 10. Project Number 11. Task Number 12. Invoice Amount 13. Invoice Currency

Project Billing - Invoice Lines Analysis: Explained

This topic provides an overview of the Project Billing - Invoice Lines analysis.

Overview

The Project Billing - Invoice Lines analysis lists the invoice lines for an invoice included in the Invoices by Status analysis, ordered by invoice line number. You can drill down to the Project Billing - Invoice Lines analysis by clicking on the Invoice Amount column data on the Invoices by Status analysis.

Key Insights

This report answers the following business question:

What are the invoice lines for a particular invoice?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Invoices by Status
Who uses this report?	• Grants Accountant • Project Billing Specialist
When do I use this report?	When you need to review the invoice lines for an invoice.
What can I do with this report?	Review the invoice lines for an invoice.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Billing - Invoices Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Contract Number	"Project Contract Header Details". "Contract Number"
Invoice Number	"Invoice Details". "Invoice Number"
Line Number	"Invoice Details". "Invoice Line Number"
Line Description	"Invoice Details". "Invoice Line Description"
Line Type	"Invoice Details". "Invoice Line Type"
Invoice Amount	Formula customized as: IFNULL("Invoice Transaction Measures". "External Project Invoice Amount in Invoice Currency", IFNULL("Invoice Transaction Measures". "Intercompany Invoice Amount in Invoice Currency", IFNULL("Invoice Transaction Measures". "Interproject Invoice Amount in Invoice Currency", 0)))
Invoice Currency	"Currency Exchange Details". "Apps Document Currency Code"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Contract Number	Filter	Prompted
Accounting Period Name	Filter	Prompted

Filter on Column	Type	Rules
Billing Type	Filter	Prompted
Invoice Status	Filter	Prompted

The following table lists the views in the report.

Views	Name
View Name	Invoice Lines
View Sections	None
Table Column and Measures	1. Contract Number 2. Invoice Number 3. Line Number 4. Line Description 5. Line Type 6. Invoice Amount 7. Invoice Currency

Project Contracts

Project Contract List Analysis: Explained

This topic provides an overview of the Project Contract List analysis.

Overview

The Project Contract List analysis displays project contracts and contract status for a business unit grouped by customer. You can drill down to project contract lines from this analysis.

Key Insights

This report answers the following business questions:

- Which project contracts are active for a business unit?
- Which projects are linked to these contracts?
- What is the total amount of consumed and remaining contract funds?
- Who are the contracted customers for a business unit?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Contract Administrator • Grants Accountant • Project Accountant • Project Billing Specialist • Project Team Member
When do I use this report?	When you need to view the transactions that contribute to contract funds consumption and the contract line amounts that are invoiced and recognized for revenue.

What can I do with this report?	You can:
	• View contracts in this analysis by:
	  ◦ Contract Business Unit
	  ◦ Contract Status
	• Drill down to the Project Contract Lines analysis using the Contract Number column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Billing - Funding Real Time, Project Billing - Invoices Real Time, and Project Billing - Revenue Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Contract Business Unit	Project Billing - Funding Real Time - Organizations: "- Contract Business Unit". "Contract Business Unit Name"
Contract Customer Account Name	"Contract Customer Account". "Contract Customer Account Name"
Contract Number	• "Project Contract Header Details"."Contract Number" • Action link to the Project Contract Lines analysis
Contract Status	"Project Contract Header Details". "Contract Status Name"
Contract Start Date	"- Contract Header Dates". "Contract Start Date"
Contract End Date	"- Contract Header Dates". "Contract End Date"
Project Number	"Project". "Project Number"

Selected Column	Source and Customized Properties
Contract Header Currency Code	"Project Contract Header Details". "Contract Header Currency Code"
Contract Amount in Contract Currency	Formula customized as: IFNULL("Project Contract Measures". "Contract Amount", 0)
Revenue in Contract Currency	• Formula customized as: IFNULL("Project Billing - Revenue Real Time"."Revenue Transaction Measures"."Revenue Amount in Contract Currency", 0) • Action link to the Project Revenue - Recognized Transactions analysis
Revenue Amount Remaining	• Calculated measure • Formula customized as: IFNULL("Project Contract Measures"."Contract Amount", 0)-IFNULL("Project Billing - Revenue Real Time"."Revenue Transaction Measures"."Revenue Amount in Contract Currency", 0) • Column data displayed in currency format with 2 decimal places, the 1000s separator enabled, and negative values shown in red.
Invoiced Amount in Contract Currency	• Formula customized as: IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."External Project Invoice Amount in Contract Currency",0)+ IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Intercompany Invoice Amount in Contract Currency", 0)+ IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Interproject Invoice Amount in Contract Currency", 0) • Action link to the Project Billing - Invoiced Transactions analysis
Contract Funds Available for Invoicing	• Calculated measure • Formula customized as: IFNULL("Project Contract Measures"."Contract Amount", 0)- IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."External Project Invoice Amount in Contract Currency", 0)+ IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Intercompany Invoice Amount in Contract Currency", 0)+ IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Interproject Invoice Amount in Contract Currency", 0)

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Contract Business Unit	Dashboard prompt	• Choice list • Default selection SQL: SELECT MIN("- Contract Business Unit"."Contract Business Unit Name") FROM "Project Billing - Funding Real Time"
Contract Status	Dashboard prompt	• Choice list • Default selection specific value: ACTIVE

The following table lists the views in the report.

View	Displayed Information
View Name	Project Contracts
View Sections	None
Table Column and Measures	1. Contract Customer Account Name 2. Contract Business Unit 3. Contract Status 4. Contract Number 5. Contract Start Date 6. Contract End Date 7. Project Number 8. Contract Header Currency Code 9. Contract Amount in Contract Currency 10. Revenue in Contract Currency 11. Revenue Amount Remaining 12. Invoiced Amount in Contract Currency 13. Contracts Funds Available for Invoicing

Project Contract Lines Analysis: Explained

This topic provides an overview of the Project Contract Lines analysis.

Overview

The Project Contract Lines analysis displays a list of all project contract lines for a contract grouped by the customer. You can drill down to the Project Contract Lines analysis by clicking on the Contract Number column data on the Project Contract List analysis.

Key Insights

This report answers the following business questions:

- Which are the contract lines for a contract?
- How much of the contract line amount is invoiced and recognized for revenue?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Project Contract List - Project Contract Lines
Who uses this report?	• Contract Administrator • Grants Accountant • Project Accountant • Project Billing Specialist

FAQ	Answer
	• Project Team Member
When do I use this report?	When you need to review contract lines.
What can I do with this report?	Review contract lines, and invoiced and revenue recognized amounts.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Billing - Funding Real Time, Project Billing - Invoices Real Time, and Project Billing - Revenue Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Contract Business Unit Name	• "- Contract Business Unit"."Contract Business Unit Name" • Excluded from view
Contract Number	"Project Contract Header Details". "Contract Number"
Contract Line Type Name	"Project Contract Line Details". "Contract Line Type Name"
Contract Line Status Name	"Project Contract Line Details". "Contract Line Status Name"
Contract Line Number	"Project Contract Line Details". "Contract Line Number"
Contract Line Name	"Project Contract Line Details". "Contract Line Name"
Contract Line Description	"Project Contract Line Details". "Contract Line Description"
Contract Line Start Date	"- Contract Line Dates". "Contract Line Start Date"
Contract Line End Date	"- Contract Line Dates". "Contract Line DateTerminated"
Project Number	"Project". "Project Number"
Contract Header Currency Code	"Project Contract Header Details". "Contract Header Currency Code"
Contract Amount	• Formula customized as: IFNULL("Project Contract Measures"."Contract Amount", 0)

Selected Column	Source and Customized Properties
	• Column data displayed in currency format with 2 decimal places, the 1000s separator enabled and negative values shown in red.
Revenue Amount in Contract Currency	• Formula customized as: IFNULL("Project Billing - Revenue Real Time"."Revenue Transaction Measures"."Revenue Amount in Contract Currency", 0) • Action link to the Project Revenue - Recognized Transactions analysis
Revenue Amount Remaining	• Calculated Measure • Formula customized as: IFNULL("Project Contract Measures"."Contract Amount", 0)-IFNULL("Project Billing - Revenue Real Time"."Revenue Transaction Measures"."Revenue Amount", 0)
Invoice Amount in Contract Currency	• Formula customized as: IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."External Project Invoice Amount in Contract Currency",IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Intercompany Invoice Amount in Contract Currency", IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Interproject Invoice Amount in Contract Currency", 0))) • Action link to the Project Billing - Invoiced Transactions analysis
Invoice Amount Remaining	• Calculated Measure • Formula customized as: IFNULL("Project Contract Measures"."Contract Amount", 0)-IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."External Project Invoice Amount in Contract Currency",IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Intercompany Invoice Amount in Contract Currency", IFNULL("Project Billing - Invoices Real Time"."Invoice Transaction Measures"."Interproject Invoice Amount in Contract Currency", 0)))

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Contract Number	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Project Contract Lines
View Sections	None
Table Column and Measures	1. Contract Number 2. Contract Line Number 3. Contract Line Name 4. Contract Line Status Name 5. Contract Line Type Name 6. Project Number 7. Contract Line Start Date 8. Contract Line End Date

View	Displayed Information
	9. Contract Line Description 10. Contract Header Currency Code 11. Contract Amount 12. Invoice Amount in Contract Currency 13. Invoice Amount Remaining 14. Revenue Amount in Contract Currency 15. Revenue Amount Remaining

Project Costs

Project Cost by Transaction Source Analysis: Explained

This topic provides an overview of the Project Cost by Transaction Source analysis.

Overview

The Project Cost by Transaction Source analysis displays project cost transactions grouped by transaction source. You can drill down to project cost transaction source details from this analysis.

Key Insights

This report answers the following business question:

How much does each transaction source contribute to project costs?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Grants Accountant • Project Accountant
When do I use this report?	When you need to determine the contribution of each transaction source to the project cost.
What can I do with this report?	You can: • View project cost transactions by: ◦ Expenditure Category ◦ Expenditure Item Dates ◦ Project Business Unit ◦ Project Name

FAQ	Answer
	◦ Transaction Source • Drill down to the Project Cost by Transaction Source Details analysis using the Cost column.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Actual Costs Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Business Unit	"Project". "Project Business Unit"
Project Number	Formula customized as: TRIM(BOTH FROM "Project". "Project Number")
Project Name	• Formula customized as: TRIM(BOTH FROM "Project"."Project Name") • Excluded from view
Project Status	• "Project"."Current Project Status Name" • Excluded from view
Transaction Source	"Original Source References". "Transaction Source Name"
Currency Type	Formula customized as: CASE WHEN VALUEOF(NQ_ SESSION. PREFERREDCURRENCY) = 'Local Currency' THEN 'Ledger Currency' WHEN VALUEOF(NQ_ SESSION. PREFERREDCURRENCY) = 'Document Currency' THEN 'Transaction Currency' ELSE VALUEOF(NQ_ SESSION. PREFERREDCURRENCY) END
Currency Code	"Currency Exchange Details". "Apps Common Currency Code"
Total Burdened Cost	• "- Expenditure Item and Cost Distribution Measures"."Cost" • Action link to the Project Cost by Transaction Source Details analysis

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Business Unit	Dashboard prompt	• Choice list • Select multiple values enabled

Filter on Column	Type	Rules
		• Default selection: All values
Project Number	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Transaction Source	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Expenditure Category	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Expenditure Item Date	Dashboard prompt	Is between calendar

The following table lists the views in the report.

View	Displayed Information
View Name	Project Cost by Transaction Source Summary
View Type	Pivot table
Pivot Column	Transaction Source
Table Column and Measures	1. Project Business Unit 2. Project Name 3. Project Currency 4. Cost

Project Cost by Transaction Source Details Analysis: Explained

This topic provides an overview of the Project Cost by Transaction Source Details analysis.

Overview

The Project Cost by Transaction Source Details analysis displays individual transactions that add up to the project summary cost amounts and pertinent transaction information that helps you to make informed analyses. You can drill down to the Project Cost by Transaction Source Details analysis by clicking on the Cost column data on the Project Cost by Transaction Source analysis.

Key Insights

This report answers the following business question:

Which transactions contribute to the total cost of my projects?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Project Cost by Transaction Source
Who uses this report?	• Grants Accountant • Project Accountant
When do I use this report?	When you need to determine the contribution of each transaction source to the project cost.
What can I do with this report?	Review individual cost transactions that contribute to your project cost.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Actual Costs Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Business Unit	• "Project"."Project Business Unit" • Excluded from view
Project Number	Formula customized as: TRIM(BOTH FROM "Project". "Project Number")
Project Name	• "Project"."Project Name" • Excluded from view
Task Number	"Task Hierarchy". "Base Task Number"
Task Name	• Formula customized as: IFNULL("Task Hierarchy"."Base Level Task Name", '') • Excluded from view
Transaction Source	"Original Source References". "Transaction Source Name"
Transaction Number	"Expenditure Item". "Expenditure Item"
Expenditure Type	"Expenditure Type". "Resource Type Name"

Selected Column	Source and Customized Properties
Expenditure Category	"Expenditure Type". "Expenditure Category Name"
Document	"Original Source References". "Document"
Document Entry	"Original Source References". "Document Entry"
Expenditure Item Date	"Expenditure Item and Cost Distribution Details". "Expenditure Item Date"
Currency Code	"Currency Exchange Details". "Apps Common Currency Code"
Burdened Cost	"- Expenditure Item and Cost Distribution Measures". "Cost"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
TRIM(BOTH FROM Project Number)	Filter	Prompted
Transaction Source	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Project Cost by Transaction Source Details Drilldown
View Type	Table
Table Column and Measures	1. Project Number 2. Task Number 3. Transaction Source 4. Document 5. Document Entry 6. Expenditure Category 7. Expenditure Type 8. Transaction Number 9. Expenditure Item Date 10. Currency Code 11. Burdened Cost

Project Cost Account Reconciliation Analysis: Explained

This topic provides an overview of the Project Cost Account Reconciliation analysis.

Overview

The Project Cost Account Reconciliation analysis displays the expenditure items that are posted to the selected GL accounts. This analysis helps to reconcile account balance discrepancies between Oracle Fusion General Ledger and Oracle Fusion Project Costing.

Key Insights

This report answers the following business question:

How can I view project cost reconciliation with GL accounts and investigate reconciliation issues?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Grants Accountant • Project Accountant
When do I use this report?	When account balance discrepancies exist between General Ledger and Project Costing.
What can I do with this report?	You can view specific or financially material transactions by: • Account • Accounting Class • Accounting Period • Event Class • Ledger Name • Project Number • Range of Debit Amount • Range of Credit Amount • Task Number • Transaction Number
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Costing - Actual Costs Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Ledger	"Ledger". "Ledger Name"
Accounting Period	"GL Accounting Date Fiscal Calendar". "Accounting Period"
Account	"General Ledger Account". "Concatenated Segments"
Event Class	"Cost Accounting Details". "Event Class Name"
Accounting Class	"Accounting Class". "Accounting Class Meaning"
Project Number	"Project". "Project Number"
Task Number	"Task"."Task Number"
Transaction Number	"Expenditure Item". "Expenditure Item"
Distribution Line Number	"Expenditure Item and Cost Distribution Details". "Distribution Line Num"
Ledger Currency	• "Ledger"."Ledger Currency" • Value suppression: Repeat
Debit Amount	• "- Cost Accounting Transaction Measures"."Unrounded Accounted Debit Amount" • Value suppression: Repeat
Credit Amount	• "- Cost Accounting Transaction Measures"."Unrounded Accounted Credit Amount" • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Ledger Name	Dashboard prompt	• Choice list • Required • Default selection SQL: SELECT MIN("Ledger"."Ledger Name") FROM "Project Costing - Actual Costs Real Time"
Accounting Period	Dashboard prompt	• Choice list • Required • Values limited by Ledger Name
Account	Dashboard prompt	• Choice list • Select multiple values enabled

Filter on Column	Type	Rules
		• Values limited by Ledger Name
Accounting Class	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by Ledger Name
Event Class	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by Ledger Name
Project Number	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by Ledger Name
Task Number	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by Project Number
Transaction Number	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by Task Number
Debit Amount	Dashboard prompt	Is between text field
Credit Amount	Dashboard prompt	Is between text field

The following table lists the views in the report.

View	Displayed Information
View Name	Project Cost Account Reconciliation
View Sections	None
Table Column and Measures	1. Ledger 2. Accounting Period 3. Account 4. Event Class 5. Accounting Class 6. Project Number 7. Task Number 8. Transaction Number 9. Distribution Line Number 10. Ledger Currency 11. Debit Amount 12. Credit Amount

Project Definition

Project List Analysis: Explained

This topic provides an overview of the Project List analysis.

Overview

The Project List analysis displays the projects for a business unit and organization. You can navigate to the Project Tasks analysis from this report.

Key Insights

This report answers the following business questions:

- Which projects are under a business unit and what are the statuses of these projects?
- What are the associated tasks for a project?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Administrator
When do I use this report?	When you need to review projects under a business unit and tasks for a project.

What can I do with this report?	You can:
	• View projects and project statuses by:
	    ◦ Project Business Unit
	    ◦ Project Organization
	    ◦ Project Status
	• Navigate to the Project Tasks analysis.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Control - Budgets Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Business Unit	• "Project"."Project Business Unit" • Excluded from view
Project Organization	• "Project"."Organization Name" • Excluded from view
Project Number	"Project". "Project Number"
Project Name	"Project". "Project Name"
Project Manager	"Project". "Current Project Manager" The "Project". "Current Project Manager" source column exists as "Project". "Project Manager" in the BI catalog.
Project Status	"Project". "Current Project Status Name" The "Project". "Current Project Status Name" source column exists as "Project". "Project Status" in the BI catalog.
Project Type	"-Project Type Attributes". "Project Type Name" The "-Project Type Attributes". "Project Type Name" source column exists as "-Project Type Attributes". "Project Type" in the BI catalog.
Project Start Date	"-Project Date Attributes". "Project Start Date"
Project Finish Date	"-Project Date Attributes". "Completion Date" The "-Project Date Attributes". "Completion Date" source column exists as "-Project Date Attributes". "Project Finish Date" in the BI catalog.
Template	• "-Project Indicator Attributes"."Template Flag" The "Project Indicator Attributes"."Template Flag" source column exists as "Project Indicator Attributes"."Template" in the BI catalog. • Hidden in view

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Business Unit	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Project Organization	Dashboard prompt	• Choice list

Filter on Column	Type	Rules
		• Values limited by Project Business Unit • Select multiple values enabled • Default selection: All values
Project Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Project Number	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Template	Filter	Equals 'N'
Project Type	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Project List
View Sections	Project Tasks
Table Column and Measures	1. Project Number 2. Project Name 3. Project Status 4. Project Manager 5. Project Type 6. Project Start Date 7. Project Finish Date

Project Tasks Analysis: Explained

This topic provides an overview of the Project Tasks analysis.

Overview

The Project Tasks analysis displays the list of tasks for projects. You can navigate to the Project Tasks analysis from the Project List analysis.

Key Insights

This report answers the following business question:

Which tasks are associated to a project?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Project List
Who uses this report?	Project Administrator
When do I use this report?	When you need to review the tasks for a project.
What can I do with this report?	Review project tasks and task dates.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Control - Budgets Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Number	"Project". "Project Number"
Task Number	"Task"."Task Number"
Task Name	"Task"."Task Name"
Task Description	"Task"."Task Description"
Planned Start Date	"Task"."Task Start Date"
Planned Finish Date	"Task"."Task Completion Date"
Actual Start Date	"Task"."Actual Start Date"
Actual Finish Date	"Task"."Actual Finish Date"
Estimated Finish Date	"Task". "Estimated Finish Date"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Filter	• Prompted • Default value: 0001 PJS CDRM AM

The following table lists the views in the report.

View	Displayed Information
View Name	Project Tasks
View Sections	None
Table Column and Measures	1. Project Number 2. Task Number 3. Task Name 4. Task Description 5. Planned Start Date 6. Planned Finish Date 7. Actual Start Date 8. Actual Finish Date 9. Estimated Finish Date

Project Performance

Budget vs Actual Cost Comparison Analysis: Explained

This topic provides an overview of the Budget vs Actual Cost Comparison analysis.

Overview

The Budget vs Actual Cost Comparison analysis displays the comparison of budget and actual costs to analyze variances. Results are grouped by business unit and project currency.

Key Insights

This report answers the following business question:

How do my actual costs compare to my budget costs?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to compare the budget and actual costs of a project.
What can I do with this report?	You can view the list of projects by: • Project Business Unit • Project Manager
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Costing - Actual Costs Real Time and Project Control - Budgets Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Business Unit	"Project". "Project Business Unit"
Currency	"Currency Exchange Details". "Apps Common Currency Code"
Project Manager	• "Project"."Current Project Manager" • Ascending sort
Project Number	"Project". "Project Number"
Budget Cost	Formula customized as: IFNULL("Project Control - Budgets Real Time"."- Budget Cost Measures". "Current Budget Cost", 0)
Actual Cost	Formula customized as: IFNULL("- Expenditure Item and Cost Distribution Measures". "Cost" 0)
Variance	• Calculated measure • Formula customized as: IFNULL("Project Control - Budgets Real Time"."- Budget Cost Measures"."Current Budget Cost",0) - IFNULL("- Expenditure Item and Cost Distribution Measures"."Cost",0) • Conditional formatting: ◦ If Current Budget Cost < 0, then column data is displayed in number format with 2 decimal places, the 1000s separator enabled, and negative values shown in red. ◦ If Current Budget Cost > 0, then column data is displayed in number format with 2 decimal places and the 1000s separator enabled.

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Business Unit	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection SQL: SELECT MIN("Project"."Project Business Unit") FROM "Project Costing - Actual Costs Real Time"
Project Manager	Dashboard prompt	• Choice list • Values limited by Project Business Unit • Select multiple values enabled • Default selection: All values

The following table lists the views in the report.

View	Displayed Information
View Name	Budget vs Actual Cost Comparison by Business Unit
View Sections	• Project Business Unit • Currency
Table Column and Measures	1. Project Manager 2. Project Number 3. Budget Cost 4. Actual Cost 5. Variance

Project Income Statement Analysis: Explained

This topic provides an overview of the Project Income Statement analysis.

Overview

The Project Income Statement analysis displays the comparison of revenue and costs to calculate the net income or loss for a project. This analysis groups revenue by revenue category and expenses by expenditure category.

Key Insights

This report answers the following business questions:

- Is my project profitable?
- Can I view my project expense and revenue grouped by expense and revenue categories?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to determine if a project is making profit or incurring loss.
What can I do with this report?	You can: • Review project expenses and revenue by expense and revenue categories • Gain insight into the consolidated financial picture of your project. • View income statements by project number
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Billing - Revenue Real Time and Project Costing - Actual Costs Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	• "Project"."Project Name" • Excluded from view
Project Number	"Project". "Project Number"
Category	"Revenue Details". "Revenue Category" union joins with "Expenditure Type". "Expenditure Category Name"
Amount	"Project Billing - Revenue Real Time". "Revenue Transaction Measures". "Revenue Amount" union joins with "- Expenditure Item and Cost Distribution Measures". "Cost" * -1
Type	'Revenue' union joins with 'Expenses'

Selected Column	Source and Customized Properties
Income	'Net Income/Loss'
Transaction Number	• Formula customized as: cast("Expenditure Item"."Expenditure Item" as char) • Excluded from view
Income Category	• 'Revenue' union joins with 'Expenses' • Descending sort
Amount	"Project Billing - Revenue Real Time". "Revenue Transaction Measures". "Revenue Amount" union joins with "- Expenditure Item and Cost Distribution Measures". "Cost"
Currency Code	"Currency Exchange Details". "Apps Common Currency Code"
Currency Type	• Formula customized as: CONCAT(CONCAT(CONCAT(CONCAT ('All amounts displayed in ',CASE WHEN VALUEOF (NQ_SESSION.PREFERRED_CURRENCY) = 'Local Currency' THEN 'Ledger Currency' WHEN VALUEOF (NQ_SESSION.PREFERRED_CURRENCY) = 'Document Currency' THEN 'Transaction Currency' ELSE VALUEOF (NQ_SESSION.PREFERRED_CURRENCY) END),' ('),"Currency Exchange Details"."Apps Common Currency Code"),')') • Currency format customized as: Currency Type value (Currency Code value)

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Number	Dashboard prompt	• Choice list • Required • Default selection SQL: SELECT MIN("Project"."Project Number") FROM "Project Billing - Revenue Real Time"
Project Number	Filter	• Prompted • Default value: PJS CPBF Flow

The following table lists the views in the report.

View	Displayed Information
View Name	• Revenue and Expense • Net Income

View	Displayed Information
	• Currency Note
View Sections	Income Category (Revenue and Expense)
Table Column and Measures	1. Revenue and Expense a. Category b. Amount 2. Net Income a. Net Income/Loss 3. Currency Note a. Currency Type

Project Revenue

Revenue by Contract Analysis: Explained

This topic provides an overview of the Revenue by Contract analysis.

Overview

The Revenue by Contract analysis displays actual revenue for contracts for a specified billing type, contract business unit, and accounting year ordered by contract number. You can drill down to contract lines and revenue recognized transactions from this analysis using the Revenue in Ledger Currency column.

Key Insights

This analysis answers the following business questions:

- Which contracts have actual revenue in the current accounting year?
- Which contracts have the lowest actual revenue in the current accounting period?
- What is the actual revenue trend for accounting periods in the selected accounting year?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Grants Accountant • Project Accountant • Project Manager • Project Team Member
When do I use this report?	When you need to view contracts listed by their actual revenue values.

FAQ	Answer

What can I do with this report?	You can:
	• View contracts in this analysis by:
	  ○ Accounting Year
	  ○ Billing Type
	  ○ Business Unit
	• Drill down to the:
	  ○ Project Revenue - Recognized Transactions analysis using the Revenue in Ledger Currency column.
	  ○ Project Revenue - Contract Lines analysis using the Revenue in Ledger Currency column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Billing - Revenue Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Contract Business Unit	• "- Contract Business Unit"."Contract Business Unit Name" • Total After
Billing Type	• "Revenue Details"."Revenue Billing Type" • Total After
Contract Number	"Project Contract Header Details". "Contract Number"
Contract Name	"Project Contract Header Details". "Contract Name"
Contract Status	"Project Contract Header Details". "Contract Status Name"
Contract Start Date	"- Contract Header Dates". "Contract Start Date"
Contract End Date	"- Contract Header Dates". "Contract End Date"
Last Recognized Date	"- Contract Header Dates". "Contract Header Last Revenue Recognition Date"
Revenue in Ledger Currency	• "Revenue Transaction Measures"."Revenue Amount" • Action link to the ○ Project Revenue - Recognized Transactions analysis

Selected Column	Source and Customized Properties
	◦ Project Revenue - Contract Lines analysis
Ledger Currency Value	• "Currency Exchange Details"."Apps Common Currency Code" • Column added to Measure Labels
Accounting Year	• Formula customized as: CAST("Fiscal Calendar"."Fiscal Year Number" AS char) • Column added to Measure Labels • Hidden in view • Total After
Accounting Period Name	• "Fiscal Calendar"."Fiscal Period" • Ascending sort • Column added to Measure Labels

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Business Unit	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection: All values
Accounting Year	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection server variable: NQ_SESSION.CURRENT_FSCL_YEAR
Billing Type	Dashboard prompt	• Choice list • Required • Select multiple values enabled • Default selection: All values
CAST("Fiscal Calendar". "Fiscal Year Number" AS char)	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Revenue by Contract
View Sections	None
Table Column and Measures	1. Contract Business Unit 2. Billing Type 3. Contract Number 4. Contract Name

View	Displayed Information
	5. Contract Status 6. Contract Start Date 7. Contract End Date 8. Last Recognized Date 9. Revenue in Ledger Currency 10. Ledger Currency 11. Accounting Period 12. Accounting Year

Project Revenue - Recognized Transactions Analysis: Explained

This topic provides an overview of the Project Revenue - Recognized Transactions analysis.

Overview

The Project Revenue - Recognized Transactions analysis displays actual revenue for the transactions of the contract or contract line and accounting period selected in the Project Revenue by Contract or Project Revenue - Contract Lines analyses, sectioned by transaction type and ordered by the transaction number or event number. You can drill down to the Project Revenue - Recognized Transactions analysis by clicking on the Revenue in Ledger Currency column data on the Project Revenue by Contract or Project Revenue - Contract Lines analyses.

Key Insights

This report answers the following business question:

Which transactions are recognized for revenue for a contract or contract line in the given accounting period?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Grants Accountant • Project Accountant • Project Manager • Project Team Member
When do I use this report?	When you need to review the revenue recognized transactions.
What can I do with this report?	Review revenue recognized transactions for a contract and accounting period.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Billing - Revenue Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Accounting Period	"Fiscal Calendar". "Fiscal Period"
Contract Number	• "Project Contract Header Details"."Contract Number" • Total After
Line Number	"Project Contract Line Details". "Contract Line Number"
Project Number	"Project". "Project Number"
Transaction Task Number	"Task"."Task Number"
Transaction Type	"Revenue Details". "Billing Transaction Type"
Transaction/ Event Number	Formula customized as: IFNULL("Expenditure Item". "Expenditure Item", IFNULL("Revenue Details". "Event Number", 0))
Expenditure/ Event Type	Formula customized as: IFNULL("Revenue Details". "Revenue Expenditure Type", IFNULL("Revenue Details". "Revenue Event Type", null))
Person	"Employee". "Employee Name"
Bill Rate	"Revenue Calculation". "Bill Rate"
Revenue in Ledger Currency	"Revenue Transaction Measures". "Revenue Amount"
Currency Code (Ledger Currency)	• "- Contract Business Unit"."Contract Business Unit Currency Code" • Column heading is blank

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Accounting Period Name	Filter	Prompted
Contract Number	Filter	Prompted

Filter on Column	Type	Rules
Contract Line Number	Filter	Prompted
Project Number	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Project Revenue Recognized Transactions
View Sections	None
Table Column and Measures	1. Accounting Period 2. Contract Number 3. Line Number 4. Project Number 5. Transaction Task Number 6. Transaction Type 7. Transaction/Event Number 8. Expenditure/Event Type 9. Person 10. Bill Rate 11. Revenue in Ledger Currency 12. Currency Code

Project Revenue - Contract Lines Analysis: Explained

This topic provides an overview of the Project Revenue - Contract Lines analysis.

Overview

The Project Revenue - Contract Lines analysis displays actual revenue for the contract lines of the contract and accounting period selected in the Project Revenue by Contract analysis ordered by contract line number. You can drill down to the Project Revenue - Contract Lines analysis by clicking on the Revenue in Ledger Currency column data on the Project Revenue by Contract analysis.

Key Insights

This report answers the following business question:

Which contract lines contribute to actual revenue for the current accounting period?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Grants Accountant • Project Accountant
When do I use this report?	When you need to review the contract lines.
What can I do with this report?	Review the actual revenue for the current accounting period.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Billing - Revenue Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Accounting Period	"Fiscal Calendar". "Fiscal Period"
Contract Number	• "Project Contract Header Details"."Contract Number" • Total After
Project Number	"Project". "Project Number"
Line Number	"Project Contract Line Details". "Contract Line Number"
Line Name	"Project Contract Line Details". "Contract Line Name"
Line Description	"Project Contract Line Details". "Contract Line Description"
Line Status	"Project Contract Line Details". "Contract Line Status Name"
Line Start Date	"- Contract Line Dates". "Contract Line Start Date"
Last Recognized Date	"- Contract Line Dates". "Contract Line Last Revenue Recognition Date"
Revenue in Ledger Currency	• Formula customized as: IFNULL("Revenue Transaction Measures"."Revenue Amount", 0) • Numeric format customized as: #,##0.00 • Action link to the Project Revenue - Recognized Transactions analysis
Currency Code (Ledger Currency)	• "- Contract Business Unit"."Contract Business Unit Currency Code" • Column heading is blank

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Accounting Period Name	Filter	Prompted
Contract Number	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Project Revenue - Contract Lines
View Sections	None
Table Column and Measures	1. Accounting Period 2. Contract Number 3. Project Number 4. Line Number 5. Line Name 6. Line Description 7. Line Status 8. Line Start Date 9. Last Recognized Date 10. Revenue in Ledger Currency 11. Currency Code

Grants Management

Award List Analysis: Explained

This topic provides an overview of the Award List analysis.

Overview

The Award List analysis displays the list of open awards ordered by contract statuses. This report also lists the awards funded by federal sponsors and awards enabled for cost sharing. You can drill down to award project funding details from this analysis.

Key Insights

This report answers the following business questions:

- Which awards are currently active?
- Which awards are past their end dates but haven't been closed?

- What is the allocated funding amount for each project of an active award?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Financials Sample Reports
Who uses this report?	• Grants Administrator • Principal Investigator
When do I use this report?	When you need to review award statuses and project funding details for active awards.

What can I do with this report?	You can:
	• View awards in this analysis by:
	  ◦ Award Status
	  ◦ Award Organization
	  ◦ Cost Sharing
	  ◦ Federal Sponsor
	• Drill down into the Award Project Funding Details analysis using the Award Number column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Projects - Grants Management - Award Funding Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Award Number	• "Award"."Award Number" • Action link to the Award Project Funding Details analysis
Sponsor Award Number	"Award". "Sponsor Award Number"
Principal Investigator	"Award". "Principal Investigator"
Award Status	"Award"."Award Status"
Award Owning Organization	"Award"."Award Owning Organization"
Sponsor Name	"Primary Sponsor". "Sponsor Name"

Selected Column	Source and Customized Properties
Federal Sponsor	"Primary Sponsor". "Federal Sponsor"
Award Start Date	"Award"."Award Start Date"
Award End Date	"Award"."Award End Date"
Cost Sharing	"Award"."Cost Shared by Internal Source"
Allocated Funding Amount	"Award Project Funding Measures". "Project Funding Amount"
Unallocated Funding Amount	"Award Funding Measures". "Award Total Unallocated Funding Amount"
Total Funding Amount	Formula customized as: IFNULL("Award Funding Measures". "Award Total Funding Amount", 0)
Award Ledger Currency	"Award". "Currency"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Award Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection specific values: Active, Under amendment, Expired
Award Organization	Dashboard prompt	• Choice list • Values limited by Award Status • Select multiple values enabled • Default selection: All values
Federal Sponsor	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Primary Sponsor"."Federal Sponsor" FROM "Projects - Grants Management - Award Funding Real Time" WHERE "Primary Sponsor"."Federal Sponsor"!='NULL' FETCH FIRST 65001 ROWS ONLY
Cost Sharing	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Award"."Cost Shared by Internal Source" FROM "Projects - Grants Management - Award Funding Real Time" WHERE "Award"."Cost

Filter on Column	Type	Rules
		Shared by Internal Source"!='NULL' FETCH FIRST 65001 ROWS ONLY

The following table lists the views for the report.

View	Displayed Information
View Name	Award List
View Sections	None
Table Column and Measures	1. Award Number 2. Sponsor Award Number 3. Principal Investigator 4. Award Status 5. Award Owning Organization 6. Sponsor Name 7. Federal Sponsor 8. Award Start Date 9. Award End Date 10. Cost Sharing 11. Allocated Funding Amount 12. Unallocated Funding Amount 13. Total Funding Amount 14. Award Ledger Currency

Award Project Funding Details Analysis: Explained

This topic provides an overview of the Award Project Funding Details analysis.

Overview

The Award Project Funding Details analysis displays the funding details of the award projects for an award selected in the Award List analysis. You can drill down to the Award Project Funding Details analysis by clicking on the Award Number column data on the Award List analysis.

Key Insights

This report answers the following business question:

What's the allocated funding amount for each project of an active award?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Financials Sample Reports - Award List
Who uses this report?	• Grants Administrator • Principal Investigator
When do I use this report?	When you need to review the project funding details.
What can I do with this report?	Review the award project funding details.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Projects - Grants Management - Award Funding Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Award Number	"Award"."Award Number"
Project Number	• "Project"."Project Number" • Ascending sort • Sub Total After
Award Budget Period	"Award Budget Period". "Award Budget Period"
Funding Source Name	"Award Funding Source". "Funding Source Name"
Issue Type	"Award Funding Details". "Issue Type"
Issue Number	"Award Funding Details". "Issue Number"
Issue Date	"Award Funding Details". "Issue Date"
Currency	"Award". "Currency"
Project Funding Amount	"Award Project Funding Measures". "Project Funding Amount"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Award Number	Filter	• Prompted • Default value: PB-AWD-OVW1

The following table lists the views in the report.

View	Displayed Information
View Name	Award Project Funding Details
View Sections	Award Number
View Type	Pivot Table
Table Column and Measures	1. Award Number 2. Project Number 3. Award Budget Period 4. Funding Source Name 5. Issue Type 6. Issue Number 7. Issue Date 8. Currency 9. Project Funding Amount

Change Orders

Change Orders Summary Analysis: Explained

This topic provides an overview of the Change Orders Summary analysis.

Overview

The Change Orders Summary analysis displays the summary of change orders that are pending for impact assessments, reviews, approvals, and implementations, grouped by project. You can drill down to view the change order details and change orders by participant status.

Key Insights

This report answers the following business questions:

- What's the number of pending change orders grouped by various stages?
- What's the total number of pending change orders?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Project Manager • Change Order Owner
When do I use this report?	When you want to get a summary of pending change orders for your projects or change orders you own.

What can I do with this report?	You can:
	• View change orders by project name.
	• Drill down to the:
	  ◦ Change Order Details analysis from the Project Name column.
	  ◦ Change Orders by Participant Status analysis from the Owner column of the Change Order Details analysis.
	  ◦ Change Order Details by Pending Impact Assessment from the Pending Impact Assessment column.
	  ◦ Change Order Details by Pending Approval from the Pending Approval column.
	  ◦ Change Order Details by Pending Implementation from the Pending Implementation column.
	  ◦ Change Order Details by Pending Review from the Pending Review column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Change Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	• "Project"."Project Name" • Ascending sort • Action link to the Change Order Details analysis
Number of Pending Change Orders	• Formula customized as: IFNULL("Count By Stage"."Number of Pending Impact Assessment Change Orders",0)+ IFNULL("Count By Stage"."Number of Pending Review Change Orders",0) +IFNULL("Count By Stage"."Number of Pending Approval Change Orders",0)+IFNULL("Count By Stage"."Number of Pending Implementation Change Orders",0) • Value suppression: Repeat

Selected Column	Source and Customized Properties
	• Column data displayed in number format with the 1000s separator enabled and negative values shown in red.
Pending Impact Assessment	• Formula customized as: IFNULL("Count By Stage"."Number of Pending Impact Assessment Change Orders",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red. • Action link to the Change Order Details by Pending Impact Assessment analysis
Pending Review	• Formula customized as: IFNULL("Count By Stage"."Number of Pending Review Change Orders",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red. • Action link to the Change Order Details by Pending Review analysis
Pending Approval	• Formula customized as: IFNULL("Count By Stage"."Number of Pending Approval Change Orders",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled, and negative values shown in red. • Action link to the Change Order Details by Pending Approval analysis
Pending Implementation	• IFNULL("Count By Stage"."Number of Pending Implementation Change Orders",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red. • Action link to the Change Order Details by Pending Implementation analysis

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Priority	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Reason	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Owner	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts

The following table lists the views in the report.

View	Displayed Information
View Name	Change Orders Summary
View Sections	None
Table Column and Measures	1. Project a. Project Name 2. Change Orders a. Number of Pending Change Orders 3. Number of Pending Change Orders a. Pending Impact Assessment b. Pending Review c. Pending Approval d. Pending Implementation

Change Orders by Reason Analysis: Explained

This topic provides an overview of the Change Orders by Reason analysis.

Overview

The Change Orders by Reason analysis displays the change orders grouped by reason in form of pivot table and pie chart. You can drill down to view change order details and change orders by participant status analysis.

Key Insights

This report answers the following business questions:

- What are the reasons for change orders?
- What's the count of change orders for a given reason?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Project Manager • Change Order Owner
When do I use this report?	When you want to know the reasons of the change orders for your projects or change orders that you own.
What can I do with this report?	You can • View change orders by project name.

FAQ	Answer

	• Drill down to the view Change Order Details and Change Order by Participant Status analysis.
	  ◦ Change Order Details analysis by using the Reason Name column.
	  ◦ Change Orders by Participant Status analysis by using the Owner column in the Change Order Details analysis.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Change Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	"Project". "Project Name"
Change Order Reason Name	"Change Order Reason". "Change Order Reason Name"
Number of Change Orders	• Formula customized as: IFNULL("Change Management Measures"."Number of Change Orders",0) • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Priority	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Owner	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Status	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts • Default selection SQL: SELECT "Change Order Status"."Change Order Status Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order

Filter on Column	Type	Rules
		Status"."Change Order Status Code" IN ('IN_PROGRESS', 'APPROVED') FETCH FIRST 65001 ROWS ONLY
Change Order Stage	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts • Default selection SQL: SELECT "Change Order Stage"."Change Order Stage Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Stage"."Change Order Stage Code" IN ('APPROVAL','IMPACT_ANALYSIS','IMPLEMENTAT FETCH FIRST 65001 ROWS ONLY

The following table lists the views in the report.

View	Displayed Information
View Name	Change Orders By Reason
View Sections	• Pivot table • Graph
Table Column and Measures	1. Project Name 2. Change Order Reason Name

Change Order Details Analysis: Explained

This topic provides an overview of the Change Order Details analysis.

Overview

The Change Order Details analysis displays the change order details and impact assessments by project. You can drill down to view change orders by participant status from this analysis.

Key Insights

This report answers the following business questions:

- What's the effort required to process the change order?
- What's the estimated cost and revenue for the change order?
- What's the current stage and status of the change order?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Project Manager • Change Order Owner
When do I use this report?	When you want to know the details and impact assessments of the change orders for your projects or change orders you own.

What can I do with this report?	You can:
	• View change orders by:
	  ◦ Project Name
	  ◦ Change Order Priority
	  ◦ Change Order Owner
	• View total number of change orders for a project.
	• Drill down to the Change Order by Participant Status analysis using the Change Order Owner column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Change Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	• "Project"."Project Name" • Ascending sort
Change Order Name	"Change Order". "Change Order Name"
Change Order Priority	"Change Order Priority". "Change Order Priority Name"
Change Order Priority Code	• Formula customized as: CASE WHEN "Change Order Priority"."Change Order Priority Code" ='HIGH' THEN 1 WHEN "Change Order Priority"."Change Order Priority Code" ='MEDIUM' THEN 2 ELSE 3 END • Additional ascending sort
Change Order Reason	"Change Order Reason". "Change Order Reason Name"
Change Order Owner	• "Change Order Owner"."Change Order Owner" • Action link to the Change Order by Participant Status analysis
Change Order Status	"Change Order Status". "Change Order Status Name"

Selected Column	Source and Customized Properties
Change Order Stage	"Change Order Stage". "Change Order Stage Name"
Currency	"Change Order Impact". "Change Order Impact Currency"
Effort in Hours	• Formula customized as: IFNULL("Change Order Impact Measures"."Effort in Hours",0) • Value suppression: Repeat • Column data displayed in currency format with the 1000s separator enabled and negative values shown in red.
Estimated Cost	• Formula customized as: IFNULL("Change Order Impact Measures"."Estimated Cost",0) • Value suppression: Repeat • Column data displayed in currency format with the 1000s separator enabled and negative values shown in red.
Estimated Revenue	• Formula customized as: IFNULL("Change Order Impact Measures"."Estimated Revenue",0) • Value suppression: Repeat • Column data displayed in currency format with the 1000s separator enabled and negative values shown in red.
Contract Amount	• Formula customized as: IFNULL("Change Order Impact Measures"."Contract Amount",0) • Value suppression: Repeat • Column data displayed in currency format with the 1000s separator enabled and negative values shown in red.

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Priority	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Reason	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Owner	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Status	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts • Default selection SQL:

Filter on Column	Type	Rules
		SELECT "Change Order Status"."Change Order Status Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Status"."Change Order Status Code" IN ('IN_PROGRESS', 'APPROVED') FETCH FIRST 65001 ROWS ONLY
Change Order Stage	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts • Default selection SQL: SELECT "Change Order Stage"."Change Order Stage Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Stage"."Change Order Stage Code" IN ('APPROVAL','IMPACT_ANALYSIS','IMPLEMENTAT FETCH FIRST 65001 ROWS ONLY

The following table lists the views in the report.

View	Displayed Information
View Name	Change Order Details
View Sections	None
Table Column and Measures	1. Project Name 2. Change Order Owner 3. Change Order Priority 4. Change Order Name 5. Change Order Reason 6. Change Order Status 7. Change Order Stage 8. Currency 9. Effort in Hours 10. Estimated Cost 11. Estimated Revenue 12. Contract Amount

Change Orders by Participant Status Analysis: Explained

This topic provides an overview of the Change Orders by Participant Status analysis.

Overview

The Change Orders by Participant Status analysis displays the change order details by participant statuses.

Key Insights

This report answers the following business questions:

- What's the current stage and status of the change order?
- What are the various participant statuses for the change order?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Project Manager • Change Order Owner • Change Order Participant
When do I use this report?	When you want to review the details of pending change orders for: • Your projects or the change orders that you own. • Which you are a participant.
What can I do with this report?	You can view the participant details by: • Project Name • Change Order Priority
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Change Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	• "Project"."Project Name" • Ascending sort
Change Order Name	"Change Order". "Change Order Name"
Change Order Priority	"Change Order Priority". "Change Order Priority Name"
Change Order Priority Code	• Formula customized as: CASE WHEN "Change Order Priority"."Change Order Priority Code" ='HIGH' THEN 1 WHEN "Change Order Priority"."Change Order Priority Code" ='MEDIUM' THEN 2 ELSE 3 END • Additional ascending sort

Selected Column	Source and Customized Properties
Change Order Owner	"Change Order Owner". "Change Order Owner"
Change Order Status	"Change Order Status". "Change Order Status Name"
Change Order Stage	"Change Order Stage". "Change Order Stage Name"
Participant Name	"Change Order Participant". "Change Order Participant Name"
Assessor Status	"Change Order Participant". "Change Order Assessment Status"
Reviewer Status	"Change Order Participant". "Change Order Review Status"
Approver Status	"Change Order Participant". "Change Order Approval Status"
Implementor Status	"Change Order Participant". "Change Order Implementation Status"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Priority	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Reason	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Owner	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Change Order Status	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts • Default selection SQL: SELECT "Change Order Status"."Change Order Status Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Status"."Change Order Status Code" IN ('IN_PROGRESS', 'APPROVED') FETCH FIRST 65001 ROWS ONLY
Change Order Stage	Dashboard prompt	• Choice list

Filter on Column	Type	Rules
		• Select multiple values enabled • Values limited by All Prompts • Default selection SQL: SELECT "Change Order Stage"."Change Order Stage Name" FROM "Project Management - Change Management Real Time" WHERE "Change Order Stage"."Change Order Stage Code" IN ('APPROVAL','IMPACT_ANALYSIS','IMPLEMENTAT FETCH FIRST 65001 ROWS ONLY
Participant	Dashboard prompt	• Choice list • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Change Orders By Participant Status
View Sections	None
Table Column and Measures	1. Project Name 2. Change Order Owner 3. Change Order Priority 4. Change Order Name 5. Change Order Status 6. Change Order Stage 7. Participant Name 8. Assessor Status 9. Reviewer Status 10. Approver Status 11. Implementor Status

Project Hierarchy

Delegate Access Analysis: Explained

This topic provides an overview of the Delegate Access analysis.

Overview

The Delegate Access analysis displays the projects grouped in an EPS element. You can also view the project start and finish dates, and project managers for such projects.

Key Insights

The report answers the following business questions:

- Which projects are under an EPS element?
- Who is the Delegate assigned to the EPS element?
- What are the projects assigned to a project manager?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Application Administrator and Project Executive
When do I use this report?	When you need to review which projects are grouped under an EPS element, their start and finish dates, and the Project Managers of individual projects.
What can I do with this report?	Review the labor resources of a project.
What type of report is this?	Oracle Transactional Business Intelligence.

Related Subject Area

This report uses the Project Management- Project Hierarchy Real Time subject area.

Report Details

The following table lists the selected columns, underlying formula, and customized column properties for the report.

Selected Column	Source and Customized Properties
Delegate	• "Project Hierarchy"."Top Level Delegate Name"
EPS Element Name	• "Project Hierarchy"."Project Hierarchy Top Level Name"
Project Name	• "Project"."Project Name"
Project Manager	• "Project"."Primary Project Manager"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Delegate Name	Dashboard prompt	• Choice list

Filter on Column	Type	Rules
		• Select multiple values enabled
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Project Resource Management - Resource Management Real Time"."Project"."Project Name" s_1 FROM "Project Resource Management - Resource Management Real Time" WHERE (("Project Resource Request"."Total Requests" >= 0) OR ("Project Resource Request"."Total Requests" IS NULL)) ORDER BY 1 ASC NULLS LAST FETCH FIRST 75001 ROWS
Project Manager	Dashboard prompt	• Choice list • Select multiple views enabled • Default selection SQL: SELECT "Project Resource Management - Resource Management Real Time"."Project"."Primary Project Manager" s_1 FROM "Project Resource Management - Resource Management Real Time" WHERE (("Project Resource Request"."Total Requests" >= 0) OR ("Project Resource Request"."Total Requests" IS NULL)) ORDER BY 1 ASC NULLS LAST FETCH FIRST 75001 ROWS ONLY
Project Start Date	Dashboard prompt	• Calendar • Is greater than or equal to • Default selection SQLSELECT MIN("- Project Start Date"."Project Start Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY
Project End Date	Dashboard prompt	• Calendar • Is less than or equal to • Default selection SQL: SELECT MAX("- Project End Date"."Project End Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY

The following table lists the views in the report.

View	Displayed Information
View Name	Delegate Access Analysis

View	Displayed Information
View Sections	None
Table Column and Measures	1. Delegate 2. EPS Element Name 3. Project Name 4. Project Manager

EPS Element Access Analysis: Explained

This topic provides an overview of the EPS Element Access analysis.

Overview

The EPS Element Access analysis lists the projects overseen by an EPS element owner, the start and end dates for projects, and the total cost incurred by each project.

Key Insights

The report answers the following business questions:

- Who are the direct owners of an EPS element?
- Which projects are active in a specified year?
- Who should I contact for explanation on EPS elements that have measure that are out of tolerance level?
- What's the start date and end date for projects under an EPS element?
- What's the total cost of each project under an EPS element?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Project Application Administrators • Project Executives
When do I use this report?	When you want to review: • Start and finish dates for projects under an EPS element • Owners of EPS elements • Total cost incurred by each project
What can I do with this report?	You can: • Review the total cost for each project under an EPS element • View the owners of EPS elements

FAQ	Answer
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Hierarchy Real Time subject area.

Report Details

The following table lists the selected columns, underlying formula, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Hierarchy	"Project Hierarchy". "Top Level Delegate Name"
Owner	• "Project Hierarchy"."Top Level Owner Name"
Project	• "Project"."Project Name"
Total Cost	• "Project Hierarchy Measures"."Total Cost" • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Start Date	Dashboard Prompt	• Calendar • Is greater than or equal to • Default selection SQL: SELECT MIN("- Project Start Date"."Project Start Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY
Project End Date	Dashboard Prompt	• Calendar • Is less than or equal to • Default selection SQL: SELECT MAX("- Project End Date"."Project End Date") FROM "Project Management - Project Hierarchy Real Time" FETCH FIRST 1 ROWS ONLY

The following table lists the views in the report.

View	Displayed Information
View Name	EPS Element Access Analysis

View	Displayed Information
View Sections	None
Table Column and Measures	1. Project Hierarchy 2. Owner 3. Project 4. Total Cost

Project Issues

Closed Issue Analysis: Explained

This topic provides an overview of the Closed Issue Analysis.

Overview

The Closed Issue Analysis displays the details of the issues that are closed. The analysis helps project managers view the issue patterns and improve future performance.

Key Insights

This report answers the following business questions:

- How were issues resolved?
- What was the actual timeliness for closing issues?
- How were action items related to the issue resolved?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know the details of the issues closed for your project or for the issues you own.

What can I do with this report?	You can:
	• View the closed issues by:
	  ◦ Issue Type
	  ◦ Closed Reason
	• Drill down to the:
	  ◦ Issue Details analysis using the Count of Issues column.

FAQ	Answer
	◦ Action Item Details analysis using the Action Items column.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Issue Type	• "Issue Type"."Issue Type Name" • Ascending sort
Closed Reason	"Issue Closed Reason". "Issue Closed Reason"
Issue Resolution	"Issue Details". "Issue Resolution"
Issue Summary	• "Issue Details"."Issue Summary" • Action link to the Issue Details analysis
Issue Duration	• "Issue Measures"."Actual Duration" • Value suppression: Repeat • Column data displayed in numeric format with negative values up to one decimal place
Actual Timeliness	• Formula customized as: TIMESTAMPDIFF(SQL_TSI_DAY, CURRENT_DATE, "Issue Details"."Issue Need By Date") • Column data displayed in numeric format with negative values shown in red • Conditional formatting: Current date and need-by date for the issue is less than zero
Action Items	• "Action Item Measure"."Count of Action Item" • Value suppression: Repeat • Column data displayed in numeric format with negative values allowed • Action link to the Action Item Details analysis
Owner	"Issue Owner"."Issue Owner"
Issue Description	"Issue Details". "Issue Description"
Issue Number	"Issue Details". "Issue Number"

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Issue Status	Filter	is equal to / is in Closed
Issue Creation Date	Dashboard prompt	• Calendar • Default selection SQL: SELECT CAST(TIMESTAMPADD(SQL_TSI_MONTH,-{3}, CURRENT_DATE) As Date) from "Project Management - Project Issues Real Time"
Issue Creator	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Issue Type	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values

The following table lists the views in the report.

View	Displayed Information
View Name	Closed Issue Analysis Report
View Sections	None
Table Column and Measures	1. Issue Type 2. Closed Reason 3. Issue Resolution 4. Issue Summary 5. Issue Duration 6. Actual Timeliness 7. Action Items 8. Owner 9. Issue Description

Detail of Open Issues Analysis: Explained

This topic provides an overview of the Detail of Open Issues analysis.

Overview

The Detail of Open Issues analysis displays the details of open issues.

Key Insights

This report answers the following business questions:

- What are the open issues for a project?
- What is the number of action items for each open issue?
- What is the due date to resolve the issue?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know the details of open issues.

What can I do with this report?	You can:
	• View the open issues sorted by:
	   ◦ Project
	   ◦ Need-by Date
	• Drill down to the:
	   ◦ Issue Details analysis using the Count of Issues column.
	   ◦ Action Item Details analysis using the Action Items column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project	• "Project"."Project Name" • Ascending sort
Need By	• "Issue Details"."Issue Need By Date" • Ascending sort • Column data displayed as custom date [FMT: dateShort]
Priority	"Issue Priority". "Issue Priority"

Selected Column	Source and Customized Properties
Issue Summary	• "Issue Details"."Issue Summary" • Action link to the Issue Details analysis
Issue Number	"Issue Details". "Issue Number"
Owner	"Issue Owner"."Issue Owner"
Creator	"Issue Creator". "Issue Creator"
Issue Type	"Issue Type"."Issue Type Name"
Action Items	• "Action Item Measure"."Count of Action Item" • Value suppression: Repeat • Column data displayed in numeric format with negative values allowed • Action link to the Action Item Details analysis

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Issue Status	Filter	Is not equal to / is not in Closed
Project	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Project Manager	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Project"."Primary Project Manager" FROM "Project Management - Project Issues Real Time" FETCH FIRST 65001 ROWS ONLY where "Project"."Primary Project Manager" =VALUEOF(NQ_SESSION.USER)
Issue Type	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values

The following table lists the views in the report.

View	Displayed Information
View Name	Detail of Open Issues Report
View Sections	None

View	Displayed Information
Table Column and Measures	1. Project 2. Need by 3. Priority 4. Issue Summary 5. Owner 6. Creator 7. Issue Type 8. Action Items

Issue Analysis by Project Analysis: Explained

This topic provides an overview of the Issue Analysis by Project analysis.

Overview

The Issue Analysis by Project analysis displays the number of issues by the issue types for all your projects. You can also view the issues grouped by project managers or project statuses.

Key Insights

This report answers the following business questions:

- What are the total number of issues for a project?
- What are the total number of issues for each issue type?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know how many issues are open for each project and their types.

What can I do with this report?	You can:
	• View the number of issue types by:
	    ○ Project
	    ○ Project Managers
	    ○ Project Status
	    ○ Project End Date
	• Drill down to the Issue Details analysis using the Count of Issues column.

What type of report is this?	Oracle Transactional Business Intelligence

FAQ	Answer

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Issue Type	"Issue Type"."Issue Type Name"
Project Name	• "Project"."Project Name" • Add ascending sort
Count of Issues	• "Issue Measures"."Count of Issues" • Value suppression: Repeat • Column data displayed in numeric format
Sort Count	• "Issue Measures"."Count of Issues" • Descending sort • Value suppression: Repeat • Column data displayed in numeric format

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Project Name	Filter	Is not null
Project Manager	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Project"."Primary Project Manager" FROM "Project Management - Project Issues Real Time" WHERE "Project"."Primary Project Manager" =VALUEOF(NQ_SESSION.USER)
Project Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Project"."Current Project Status Name" FROM "Project Management - Project Issues Real Time" where "Project"."Current Project Status Name" = 'Active'
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled

Column	Type	Rules
		• Default selection: All values
Project Finish Date	Dashboard prompt	• Calendar • Default selection: None • Presentation Variable: PROJ_END_DT

The following table lists the views in the report.

View	Displayed Information
View Name	Issue Analysis by Project Report
View Sections	None
Table Column and Measures	1. Sort Count 2. Project Name 3. Count of Issues 4. Issue Type

Issue Aging Analysis: Explained

This topic provides an overview of the Issue Aging analysis.

Overview

The Issue Aging analysis displays the number of issues grouped by the days they are open, for example, less than a month, more than a month, and so on. You can also view the number of issues for each issue status.

Key Insights

This report answers the following business question:

- What are the total number of issues by age and status?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know the number of open issues by their age and status.
What can I do with this report?	You can view the number of issues by age range and take appropriate actions on them.
What type of report is this?	Oracle Transactional Business Intelligence

FAQ	Answer

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Age	• Formula customized as: CASE WHEN TIMESTAMPDIFF(SQL_TSI_DAY ,"Issue Details"."Issue Creation Date" , CURRENT_DATE) < 8 THEN 'One week' WHEN TIMESTAMPDIFF(SQL_TSI_DAY ,"Issue Details"."Issue Creation Date" , CURRENT_DATE) BETWEEN 8 AND 14 THEN 'Two weeks' WHEN TIMESTAMPDIFF(SQL_TSI_DAY ,"Issue Details"."Issue Creation Date" , CURRENT_DATE) BETWEEN 15 AND 31 THEN 'One Month' ELSE 'More than one month' END • Value suppression: Repeat • Action link to the Issue Details Report
Count of Issues	• "Issue Measures"."Count of Issues" • Value suppression: Repeat • Column data displayed in numeric format with negative values allowed
Age for Sorting	• Formula customized as: CASE WHEN TIMESTAMPDIFF(SQL_TSI_DAY , "Issue Details"."Issue Creation Date" , CURRENT_DATE) < 8 THEN '1' WHEN TIMESTAMPDIFF(SQL_TSI_DAY , "Issue Details"."Issue Creation Date" , CURRENT_DATE) BETWEEN 8 AND 14 THEN '2' WHEN TIMESTAMPDIFF(SQL_TSI_DAY , "Issue Details"."Issue Creation Date" , CURRENT_DATE) BETWEEN 15 AND 31 THEN '3' ELSE '4' END • Descending sort

Issue Status	• "Issue Status"."Issue Status"
	• Conditional formatting:
	  ◦ If the Issue Status is equal to / is in Closed then, the number of issues are marked in **#800000** color.
	  ◦ If the Issue Status is equal to / is in In progress then, the number of issues are marked in **#008000** color.
	  ◦ If the Issue Status is equal to / is in Closed then, the number of issues are marked in **#0000FF**color.

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Project Status	Filter	is not equal to / is not in Closed
Project	Dashboard prompt	• Choice list • Select multiple values enabled

Column	Type	Rules
		• Default selection: All values
Owner	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values • Default selection SQL: SELECT "Issue Owner"."Issue Owner" FROM "Project Management - Project Issues Real Time" where "Issue Owner"."Issue Owner" =VALUEOF(NQ_SESSION.USER)
Issue Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: SQL Results SELECT "Issue Status"."Issue Status" FROM "Project Management - Project Issues Real Time" where "Issue Status"."Issue Status" <> 'Closed' FETCH FIRST 65001 ROWS ONLY • Default selection SQL: SELECT "Issue Status"."Issue Status" FROM "Project Management - Project Issues Real Time" where "Issue Status"."Issue Status" IN ('New','In progress')

The following table lists the views in the report.

View	Displayed Information
View Name	Issue Aging Report
View Sections	None
Table Column and Measures	1. Number Of Issues 2. Age 3. Issue Status

Issues by Type Analysis: Explained

This topic provides an overview of the Issues by Type analysis.

Overview

The Issues by Type analysis displays the number of issues by issue types.

Key Insights

This report answers the following business question:

- What are the total number of issues for each issue type?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know the number of issues for each issue type.
What can I do with this report?	You can view the number of issues grouped by issue type, status, priority, and project.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	"Project". "Project Name"
Type	"Issue Type"."Issue Type Name"
Number of Issues	• "Issue Measures"."Count of Issues" • Value suppression: Repeat • Column data displayed in number format
Issue Priority	"Issue Priority". "Issue Priority"
Issue Status	"Issue Status". "Issue Status"

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Project Name	Dashboard prompt	• Choice list

Column	Type	Rules
		• Select multiple values enabled • Default selection: All values
Issue Owner	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Issue Status	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values • Default selection SQL: SELECT "Issue Status"."Issue Status" FROM "Project Management - Project Issues Real Time" where "Issue Status"."Issue Status" IN ('New','In progress')

The following table lists the views in the report.

View	Displayed Information
View Name	Issues by Type Report
View Sections	• Table • Pie Chart
Table Column and Measures	1. Issue Priority 2. Issue Status 3. Type 4. Project Name 5. Number of Issues

My Open Action Items Analysis: Explained

This topic provides an overview of the My Open Action Items analysis.

Overview

The My Open Action Items analysis displays the details of the action items that are owned by the user. You can view the action items sorted by their need by date.

Key Insights

This report answers the following business questions:

- Which action items do I own?
- What are the deadlines to resolve the action items I own?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know the action items you own and the deadline to resolve the action items.
What can I do with this report?	You can: • View the actions items details. • Drill down to the Issue Details Report using the Issue column.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Need by	• "Issue Details"."Issue Need By Date" • Ascending sort • Column data displayed in custom date format as M/d/yy
Action Item	"Action Item Details". "Action Item"
Action Item Description	"Action Item Details". "Action Item Description"
Project	"Project". "Project Name"
Action Item Status	"Action Item Status". "Action Item Status"
Issue	• "Issue Details"."Issue Summary" • Action link to Issue Details Report using the Issue Summary column
Issue Number	"Issue Details". "Issue Number"
Issue Type	"Issue Type"."Issue Type Name"
Issue Priority	"Issue Priority". "Issue Priority"

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Action Item Status	Filter	is not equal to / is not in Complete
Owner		• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Action Item Owner"."Action Item Owner" FROM "Project Management - Project Issues Real Time" where "Action Item Owner"."Action Item Owner" =VALUEOF(NQ_SESSION.USER)
Project	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Issue Type	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values

The following table lists the views in the report.

View	Displayed Information
View Name	My Open Action Items Report
View Sections	None
Table Column and Measures	1. Need by 2. Action Item 3. Action Item Description 4. Project 5. Action Item Status 6. Issue 7. Issue Type 8. Issue Priority

My Open Issues Analysis: Explained

This topic provides an overview of the My Open Issues analysis.

Overview

The My Open Issues analysis displays the issues that are owned by the user. You can view the issues sorted by their need by date.

Key Insights

This report answers the following business questions:

- Which issues do I own?
- What are the total number of action items for each issue I own?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Project Manager • Team Member
When do I use this report?	When you need to know the issues you own and the deadline to resolve them.
What can I do with this report?	You can: • View the issue details. • Drill down to the Issue Details Report using the Issue Summary column. • Drill down to the Action Item Details Report using the Action Items column.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Need by	• "Issue Details"."Issue Need By Date" • Additional ascending sort • Custom date format: [FMT: dateShort]
Priority	"Issue Priority". "Issue Priority"
Status	"Issue Status". "Issue Status"
Issue Type	"Issue Type"."Issue Type Name"
Issue Summary	• "Issue Details"."Issue Summary" • Action link to Issue Details Report
Project	"Project". "Project Name"

Selected Column	Source and Customized Properties
Action Items	• "Action Item Measure"."Count of Action Item" • Value suppression: Repeat • Column data displayed in number format and negative values allowed • Action link to Action Item Details Report
Issue Description	"Issue Details". "Issue Description"
Issue Number	"Issue Details". "Issue Number"
Sort Priority	• Formula customized as: CASE when "Issue Priority"."Issue Priority" = 'High' then 3 when "Issue Priority"."Issue Priority" = 'Medium' then 2 when "Issue Priority"."Issue Priority" = 'Low' then 1 end • Additional descending sort • Column data displayed in number format and negative values allowed

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Issue Status	Filter	is not equal to / is not in Closed
Owner	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values • Default selection SQL: SELECT "Issue Owner"."Issue Owner" FROM "Project Management - Project Issues Real Time" where "Issue Owner"."Issue Owner" =VALUEOF(NQ_SESSION.USER)
Issue Type	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Project	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values

The following table lists the views in the report.

View	Displayed Information
View Name	My Open Issues Report
View Sections	None
Table Column and Measures	1. Need by 2. Priority

View	Displayed Information
	3. Status 4. Issue Type 5. Issue Summary 6. Project 7. Action Items 8. Issue Description

Open Action Items by Project Analysis: Explained

This topic provides an overview of the Open Action Items by Project analysis.

Overview

The Open Action Items by Project analysis displays the details of the open action items grouped by the project.

Key Insights

This report answers the following business questions:

- Which action items are open for my projects?
- Who's the owner of the open action item?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to know the open action items for your project and the deadline to resolve the action items.
What can I do with this report?	You can: • View the open actions items details. • View the owners for the open action items • Drill down to the Issue Details Report using the Issue Summary column.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Issues Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project	• "Project"."Project Name" • Ascending sort
Need by	• "Issue Details"."Issue Need By Date" • Additional ascending sort • Column data displayed in custom date format as M/d/yy
Issue Priority	"Issue Priority". "Issue Priority"
Action Item Summary	"Action Item Details". "Action Item"
Action Item Owner	"Action Item Owner". "Action Item Owner"
Action Item Status	"Action Item Status". "Action Item Status"
Issue Summary	• "Issue Details"."Issue Summary" • Action link to Issue Details Report using the Issue Summary column
Issue Number	"Issue Details". "Issue Number"
Issue Type	"Issue Type"."Issue Type Name"

The following table lists the prompts and filters used in the report.

Column	Type	Rules
Action Item Status	Filter	is not equal to / is not in Complete
Project	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Issue Type	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection: All values
Project Manager	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: SELECT "Project"."Primary Project Manager" FROM "Project Management - Project Issues Real Time" FETCH FIRST 65001 ROWS ONLY where

Column	Type	Rules
		"Project"."Primary Project Manager" =VALUEOF(NQ_SESSION.USER)

The following table lists the views in the report.

View	Displayed Information
View Name	Open Action Items by Project Report
View Sections	None
Table Column and Measures	1. Project 2. Need by 3. Issue Priority 4. Action Item Summary 5. Action Item Owner 6. Action Item Status 7. Issue Summary 8. Issue Type

Project Management

Actual Project Labor Margin Analysis: Explained

This topic provides an overview of the Actual Project Labor Margin analysis.

Overview

The Actual Project Labor Margin analysis displays the actual hours, actual cost, bill amount, margin, and margin percentage for the selected project.

Key Insights

This report answers the following business questions:

- What are the planned billing amounts for my projects?
- What are the operating margins for my projects?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports

FAQ	Answer
Who uses this report?	Project Manager
When do I use this report?	When you need to review the bill amount and margin for your projects.
What can I do with this report?	You can review the following for your projects: • Actual hours • Actual cost • Bill amount • Margin • Margin percentage
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Planning Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	"Project". "Project Name"
Hours	"Project Planning Measures". "Actual Hours"
Bill Amount	"Project Planning Measures". "Actual Labor Bill Amount"
Cost	"Project Planning Measures". "Actual Labor Cost"
Margin	Formula customized as: "Project Planning Measures". "Actual Labor Bill Amount" - "Project Planning Measures". "Actual Labor Cost"
Margin Percentage	Formula customized as: ROUND((("Project Planning Measures". "Actual Labor Bill Amount" - "Project Planning Measures". "Actual Labor Cost")/ "Project Planning Measures". "Actual Labor Bill Amount")*100, 2)

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Bill Amount	Filter	Is greater than 0

The following table lists the views in the report.

View	Displayed Information
View Name	Actual Project Labor Margin Report
View Sections	None
Table Column and Measures	1. Project Name 2. Hours 3. Bill Amount 4. Cost 5. Margin 6. Margin Percentage

Planned and Actual Project Labor Comparison Analysis: Explained

This topic provides an overview of the Planned and Actual Project Labor Comparison analysis.

Overview

The Planned and Actual Project Labor Comparison analysis displays the planned and actual margin, margin percentage, and margin variance for the selected project.

Key Insights

This report answers the following business questions:

- What are the planned and actual margins of my projects?
- What are the planned and actual margin percentages of my projects?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to review the margins and margin percentages for your projects.
What can I do with this report?	Review the following for your projects: • Planned margin and margin percentage • Actual margin and margin percentage • Variance between planned and actual margin and margin percentage

FAQ	Answer
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Planning Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	"Project". "Project Name"
Planned Margin	Formula customized as: "Project Planning Measures". "Labor Bill Amount" - "Project Planning Measures". "Labor Cost"
Actual Margin	Formula customized as: "Project Planning Measures". "Actual Labor Bill Amount" - "Project Planning Measures". "Actual Labor Cost"
Variance	Formula customized as: ("Project Planning Measures". "Labor Bill Amount" - "Project Planning Measures". "Labor Cost") - ("Project Planning Measures". "Actual Labor Bill Amount" - "Project Planning Measures". "Actual Labor Cost")
Planned Margin Percentage	Formula customized as: ROUND((("Project Planning Measures". "Labor Bill Amount" - "Project Planning Measures". "Labor Cost")/ "Project Planning Measures". "Labor Bill Amount")*100, 2)
Actual Margin Percentage	Formula customized as: ROUND((("Project Planning Measures". "Actual Labor Bill Amount" - "Project Planning Measures". "Actual Labor Cost")/ "Project Planning Measures". "Actual Labor Bill Amount")*100, 2)
Variance	Formula customized as: ROUND((("Project Planning Measures". "Labor Bill Amount" - "Project Planning Measures". "Labor Cost")/ "Project Planning Measures". "Labor Bill Amount")*100, 2) - ROUND((("Project Planning Measures". "Actual Labor Bill Amount" - "Project Planning Measures". "Actual Labor Cost")/ "Project Planning Measures". "Actual Labor Bill Amount")*100, 2)

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Labor Bill Amount	Filter	Is greater than 0

Filter on Column	Type	Rules

The following table lists the views in the report.

View	Displayed Information
View Name	Planned and Actual Labor Comparison
View Sections	None
Table Column and Measures	1. Project Name 2. Planned Margin 3. Actual Margin 4. Variance 5. Planned 6. Actual 7. Variance

Project Cost Variance Analysis: Explained

This topic provides an overview of the Project Cost Variance analysis.

Overview

The Project Cost Variance analysis displays the planned and actual amounts and their variance for labor, expense, and total cost categories by task for the selected project.

Key Insights

This report answers the following business question:

- What are the planned and actual costs for my projects?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to review the planned and actual amounts for your project costs.
What can I do with this report?	Review by project task: • Planned and actual labor and their variance

FAQ	Answer
	• Planned and actual expense and their variance
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Planning Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Task Name	• "Task"."Task Name" • Ascending sort
Planned (Labor)	"Project Planning Measures". "Labor Cost"
Actual (Labor)	"Project Planning Measures". "Actual Labor Cost"
Variance (Labor)	Formula customized as: "Project Planning Measures". "Labor Cost" - "Project Planning Measures". "Actual Labor Cost"
Planned (Expense)	"Project Planning Measures". "Expense Amount"
Actual (Expense)	"Project Planning Measures". "Actual Expense Amount"
Variance (Expense)	Formula customized as: "Project Planning Measures". "Expense Amount" - "Project Planning Measures". "Actual Expense Amount"
Planned (Total)	"Project Planning Measures". "Total Cost"
Actual (Total)	"Project Planning Measures". "Total Actual Cost"
Variance (Total)	Formula customized as: "Project Planning Measures". "Total Cost" - "Project Planning Measures". "Total Actual Cost"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Project Cost Variance
View Sections	None
Table Column and Measures	1. Task a. Task Name 2. Labor a. Planned b. Actual c. Variance 3. Expense a. Planned b. Actual c. Variance 4. Total a. Planned b. Actual c. Variance

Resources Currently on My Projects Analysis: Explained

This topic provides an overview of the Resources Currently on My Projects analysis.

Overview

The Resources Currently on My Projects analysis displays all resources who are currently assigned to the projects managed by you.

Key Insights

This report answers the following business question:

What are the statuses of the resources currently working on my projects?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to review the resources working on your projects.

FAQ	Answer
What can I do with this report?	You can: • Review resource assignment status • Monitor resource assignment dates
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Resources Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Resource Name	• "Resource"."Resource Name" • Ascending sort
Project	"Project". "Project Name"
Assignment Status	"Resource Assignment Status". "Project Resource Assignment Status"
Project Resource Role	"Project Role". "Project Role Name"
Resource From Date	"Project Resource Start Date". "Project Resource Start Date"
Resource To Date	"Project Resource Finish Date". "Project Resource Finish Date"
Percentage Allocation	"Project Resource Measures". "Resource Allocation in Hours"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled
Resource Class Name	Filter	Equals 'Labor'
Execution Project Status Code	Filter	Equals 'CLOSED'

The following table lists the views in the report.

View	Displayed Information
View Name	Resources Currently on My Projects
View Sections	None
Table Column and Measures	1. Resource Name 2. Project 3. Assignment Status 4. Project Resource Role 5. Resource From Date 6. Resource To Date 7. Percentage Allocation

Placeholder Resources on My Projects Analysis: Explained

This topic provides an overview of the Placeholder Resources on My Projects analysis.

Overview

The Placeholder Resources on My Projects analysis displays the unstaffed positions listed for the projects managed by you.

Key Insights

This report answers the following business question:

Who are the placeholder resources assigned to my projects?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to view the placeholder resource assignments for your projects.
What can I do with this report?	Review unstaffed positions and placeholder resources assigned to your projects.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Resources Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Resource Name	"Resource". "Resource Name"
Project Resource Role	"Project Role". "Project Role Name"
Project Name	"Project". "Project Name"
Resource from Date	"Project Resource Start Date". "Project Resource Start Date"
Resource To Date	"Project Resource Finish Date". "Project Resource Finish Date"
Allocation	"Project Resource Measures". "Resource Allocation in Hours"
Project Start Date	"- Project Date Attributes". "Project Start Date"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled
Resource Email	Filter	Is null
Execution Project Status	Filter	Not 'CLOSED'

The following table lists the views in the report.

View	Displayed Information
View Name	Placeholder Resources on my Projects
View Sections	None
Table Column and Measures	1. Project Name 2. Resource Name 3. Project Resource Role 4. Resource from Date 5. Resource To Date 6. Allocation 7. Project Start Date

Resource Allocation and Task Assignment Comparison by Week Analysis: Explained

This topic provides an overview of the Resource Allocation and Task Assignment Comparison by Week analysis.

Overview

The Resource Allocation and Task Assignment Comparison by Week analysis displays the weekly comparison of allocated and total task assignment hours for the resources of a project. You can drill down to weekly data from this analysis.

Key Insights

This report answers the following business questions:

- What are the allocated hours for my project resources?
- What are the assignment percentages for my project resources?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to review resource allocation for your projects.
What can I do with this report?	You can: • Review resource allocation hours and assignment percentages. • Drill down to individual weeks from the Week and Calendar Week Start Date columns.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Management - Project Resources Real Time and Project Management - Planning Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Week	• "Time"."Offset Week"

Selected Column	Source and Customized Properties
	• Ascending sort
Calendar Week Start Date	"Time". "Calendar Week Start Date"
Allocated Hours	"Project Resource Measures". "Resource Allocation in Hours"
Total Task Assignment Hours	"Project Management - Planning Real Time". "Project Planning Measures". "Planned Hours"
Percentage Task Assignment	Formula customized as: ("Project Management - Planning Real Time". "Project Planning Measures". "Planned Hours")*100/ "Project Resource Measures". "Resource Allocation in Hours"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled
Resource Name	Dashboard prompt	• Choice list • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Resource Allocation and Task Assignment Comparison by Week
View Sections	• Table • Graph
Table Column and Measures	1. Week 2. Calendar Week Start Date 3. Allocated Hours 4. Total Task Assignment Hours 5. Percentage Task Assignment

Tasks Scheduled Outside of Resource Assignment Dates Analysis: Explained

This topic provides an overview of the Tasks Scheduled Outside of Resource Assignment Dates analysis.

Overview

The Tasks Scheduled Outside of Resource Assignment Dates analysis displays the project tasks that are scheduled outside the project resource assignment dates.

Key Insights

This report answers the following business question:

Which project tasks are scheduled outside my project resource assignment dates?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to view tasks that lie outside your resource assignment dates.
What can I do with this report?	You can use this report to take decisions on tasks that are scheduled outside resource assignment dates.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Areas

This report uses the Project Management - Project Resources Real Time and Project Management - Planning Real Time subject areas.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Task Start Date	"- Project Plan Start Date". "Project Plan Start Date"
Project Name	• "Project"."Project Name" • Ascending sort

Selected Column	Source and Customized Properties
Task Name	"Task"."Task Name"
Resource Name	"Resource". "Resource Name"
Task Finish Date	"- Project Plan Finish Date". "Project Plan Finish Date"
Resource From Date	"Project Resource Start Date". "Project Resource Start Date"
Resource To Date	"Project Resource Finish Date". "Project Resource Finish Date"
Assignment Status	"Resource Assignment Status". "Project Resource Assignment Status Name"
Task Percent Complete	"Project Planning Measures". "Task Percent Complete"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Task Start Date and Resource From Date	Filter	Task Start Date < Resource From Date
Task Finish Date and Resource To Date	Filter	Task Finish Date > Resource To Date

The following table lists the views in the report.

View	Displayed Information
View Name	List of Tasks Assigned Outside Resource Allocation Dates for a Project
View Sections	• Pivot table • Pivot table:2 • Pivot table:3 • Pivot table:4
Table Column and Measures	1. Task Start Date 2. Project Name 3. Task Name 4. Resource Name 5. Task Finish Date 6. Resource From Date 7. Resource To Date 8. Assignment Status 9. Task Percent Complete

Remaining Project Hours Analysis: Explained

This topic provides an overview of the Remaining Project Hours analysis.

Overview

The Remaining Project Hours analysis displays the effort in hours, actual hours, and remaining hours for all projects using the project hierarchy.

Key Insights

This report answers the following business questions:

- How many hours have been spent on a project?
- How many hours are remaining on a project?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Executive
When do I use this report?	When you need to look up the hours remaining on a project.
What can I do with this report?	Review remaining hours for your projects.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Hierarchy Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Hierarchy	• Project Hierarchy Top Level • Project Hierarchy Level 8 • Project Hierarchy Level 7 • Project Hierarchy Level 6 • Project Hierarchy Level 5 • Project Hierarchy Level 4 • Project Hierarchy Level 3

Selected Column	Source and Customized Properties
	• Project Hierarchy Level 2 • Project Hierarchy Level 1 • Project Hierarchy Base Level
Project Name	"Project". "Project Name"
Start Date	• "- Project Plan Start Date"."Project Plan Start Date" • Value suppression: Suppress • Date format: M/d/yy
End Date	• "- Project Plan Finish Date"."Project Plan Finish Date" • Value suppression: Suppress • Date format: M/d/yy
Effort in Hours	"Project Hierarchy Measures". "Planned Hours"
Actual Hours	"Project Hierarchy Measures". "Actual Hours"
Remaining Hours	Formula customized as: "Project Hierarchy Measures". "Planned Hours" - "Project Hierarchy Measures". "Actual Hours"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Start Date	Filter	Prompted
End Date	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Remaining Project Hours
View Sections	None
Table Column and Measures	1. Project Hierarchy 2. Project Name 3. Start Date 4. End Date 5. Effort in Hours 6. Actual Hours 7. Remaining Hours

Total Project Hours Analysis: Explained

This topic provides an overview of the Total Project Hours analysis.

Overview

The Total Project Hours analysis displays the planned labor hours for the primary resource roles in the project hierarchy.

Key Insights

This report answers the following business question:

How much effort is planned for each resource role in my projects?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Executive
When do I use this report?	When you need to view the planned labor hours for the primary resource roles.
What can I do with this report?	View planned hours by resource roles.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Hierarchy Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Hierarchy	• Project Hierarchy Top Level • Project Hierarchy Level 8 • Project Hierarchy Level 7 • Project Hierarchy Level 6 • Project Hierarchy Level 5 • Project Hierarchy Level 4 • Project Hierarchy Level 3 • Project Hierarchy Level 2 • Project Hierarchy Level 1

Selected Column	Source and Customized Properties
	• Project Hierarchy Base Level
Primary Resource Role	"Resource". "Resource Primary Role Name"
Effort in Hours	• "Project Hierarchy Measures"."Planned Hours" • Value suppression: Repeat • Total After

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Plan Start Date	Dashboard prompt	• Calendar • Is greater than or equal to
Project Plan End Date	Dashboard prompt	• Calendar • Is less than or equal to
Project Hierarchy	Dashboard prompt	• Choice list • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	Project Hours by Primary Resource Role
View Type	Pivot table
Pivot Column	Effort in Hours
Table Column and Measures	1. Project Hierarchy 2. Primary Resource Role 3. Effort in Hours

Total and Actual EPS Node Cost Analysis: Explained

This topic provides an overview of the Total and Actual EPS Node Cost analysis.

Overview

The Total and Actual EPS Node Cost analysis displays the actual and total costs for the nodes in the project hierarchy.

Key Insights

This report answers the following business questions:

- What are the actual costs for the nodes in my project hierarchy?

- What are the total costs for the nodes in my project hierarchy?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Executive
When do I use this report?	When you need to view the costs for the nodes in your project hierarchy.
What can I do with this report?	View the following for project hierarchy nodes: • Actual cost • Total cost
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Hierarchy Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Hierarchy	"Project Hierarchy". "Project Hierarchy Top Level Name"
Total Cost	• "Project Hierarchy Measures"."Total Cost" • Value suppression: Repeat
Total Actual Cost	• "Project Hierarchy Measures"."Actual Total Cost" • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Hierarchy	Dashboard prompt	Choice list

The following table lists the views in the report.

View	Displayed Information
View Name	Total and Actual EPS Node Cost
View Type	• Table • Graph
Table Column and Measures	1. Total Cost 2. Total Actual Cost 3. Project Hierarchy

All Work Items in My Projects Analysis: Explained

This topic provides an overview of the All Work Items in My Projects analysis.

Overview

The All Work Items in My Projects analysis displays all the work items for the projects managed by you. You can drill down to the work items for a project from this analysis.

Key Insights

This report answers the following business questions:

- What are the work items for my projects?
- What are the work item statuses that determine the completion of my project tasks?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to track your project work items.
What can I do with this report?	You can: • View all work items and work item statuses for your projects. • Drill down into work items for a specific project.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Work Items Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	"Project". "Project Name"
Task Name	"Task"."Task Name"
Owner	"Work Item Owner". "Owner"
Work Item Name	"Work Item Details". "Short Name"
Work Item Type	"Work Item Type"."Work Item Type Name"
Work Item Status	• "Work Item Status"."Work Item Status Name" • Ascending sort
Due Date	"Work Item Details". "Need by Date"
Status to Determine Task Completion	"Work Item Details". "Status to Determine Task Completion"
Work Item Priority	"Work Item Priority". "Work Item Priority Name"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Owner	Dashboard prompt	• Choice list • Select multiple values enabled
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled
Work Item Status	Dashboard prompt	• Choice list • Select multiple values enabled
Work Item Type	Dashboard prompt	• Choice list • Select multiple values enabled

The following table lists the views in the report.

View	Displayed Information
View Name	All Work Items in My Projects Analysis
View Sections	None

View	Displayed Information
Table Column and Measures	1. Project Name 2. Owner 3. Work Item Name 4. Work Item Type 5. Work Item Priority 6. Work Item Status 7. Status to Determine Task Completion 8. Due Date 9. Task Name

My Unstarted Project Deliverables Analysis: Explained

This topic provides an overview of the My Unstarted Project Deliverables analysis.

Overview

The My Unstarted Project Deliverables analysis displays all project deliverables that are overdue or due in the immediate future for the projects managed by you. You can drill down to the new high priority deliverables for the selected project from this analysis.

Key Insights

This report answers the following business questions:

- Which of my project deliverables are overdue?
- Which of my project deliverables are due soon?
- Which of my project deliverables are yet to start?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to track your project deliverables.
What can I do with this report?	You can: • Drill down into new high priority project deliverables. • Identify and begin working on project deliverables that are overdue or due soon.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Work Items Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project	"Project". "Project Name"
Task Name	"Task"."Task Name"
Owner	"Work Item Owner". "Owner"
Status	• "Work Item Status"."Work Item Status Name" • Additional ascending sort
Deliverable Name	"Work Item Details". "Short Name"
Due Date	"Work Item Details". "Need by Date"
	"Work Item Type"."Work Item Type Name"
Deliverable Priority	• "Work Item Priority"."Work Item Priority Name" • Ascending sort

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Deliverable Priority	Dashboard prompt	• Choice list • Select multiple values enabled • SQL source of list of values: SELECT "Work Item Priority"."Work Item Priority Name" FROM "Project Management - Project Work Items Real Time" WHERE "Work Item Priority"."Work Item Priority Name" IN ('High','Low','Medium') FETCH FIRST 65001 ROWS ONLY
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled
Work Item	Filter	Equals 'Deliverable'
Status	Filter	Equals 'New'

The following table lists the views in the report.

View	Displayed Information
View Name	My Unstarted Project Deliverables Analysis
View Sections	None
Table Column and Measures	1. Project 2. Task Name 3. Owner 4. Status 5. Deliverable Type 6. Deliverable Priority 7. Deliverable Name 8. Due Date

My Due Project Deliverables Analysis: Explained

This topic provides an overview of the My Due Project Deliverables analysis.

Overview

The My Due Project Deliverables analysis displays project deliverables that are overdue by a week or due in a week for the projects managed by you. You can drill down to the incomplete deliverables for the selected project from this analysis.

Key Insights

This report answers the following business questions:

- Which of my project deliverables are due in a week?
- Which of my project deliverables are overdue by a week?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to track your project deliverables.
What can I do with this report?	You can: • Gain insight into overdue and immediately due deliverables.

FAQ	Answer
	• Drill down to view incomplete deliverables for a project.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Project Work Items Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Days Due	Formula customized as: CASE WHEN "Work Item Measures". "Days Due" BETWEEN 0 AND 7 THEN 'Due in 7 Days or less' WHEN "Work Item Measures". "Days Due" > 7 THEN 'Due in 7 days or more' WHEN "Work Item Measures". "Days Due" BETWEEN -7 AND 0 THEN 'Overdue by 7 Days or less' WHEN "Work Item Measures". "Days Due" < -7 THEN 'Overdue by 7 Days or more' ELSE 'Others' END
Project Name	"Project". "Project Name"
Task Name	"Task"."Task Name"
Owner	"Work Item Owner". "Owner"
Deliverable Name	"Work Item Details". "Short Name"
Deliverable Type	"Work Item Type"."Work Item Type Name"
Due Date	"Work Item Details". "Need by Date"
Deliverable Priority	"Work Item Priority". "Work Item Priority Name"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Owner	Dashboard prompt	• Choice list • Select multiple values enabled
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled
Days Due	Dashboard prompt	• Choice list • Select multiple values enabled • SQL source of list of values:

Filter on Column	Type	Rules
		Select 'Due in 7 Days or less' From "Project Management - Project Work Items Real Time" UNION Select 'Due in 7 Days or more' From "Project Management - Project Work Items Real Time" UNION Select 'Overdue by 7 Days or less' From "Project Management - Project Work Items Real Time" UNION Select 'Overdue by 7 Days or more' From "Project Management - Project Work Items Real Time" • Default selection: Due in 7 Days or less
Days Due	Filter	Is not null
Work Item	Filter	Equals 'Deliverable'
Work Item Status	Filter	Not 'COMPLETED'

The following table lists the views in the report.

View	Displayed Information
View Name	Deliverables Due in My Projects Analysis
View Sections	None
Table Column and Measures	1. Project Name 2. Task Name 3. Owner 4. Deliverable Name 5. Deliverable Type 6. Deliverable Priority 7. Due Date 8. Days Due

Requirements

Backlog Item Status Analysis: Explained

This topic provides an overview of the Backlog Item Status analysis.

Overview

The Backlog Item Status analysis displays the total number of backlog items by status for every product owner and scrum master. You can drill down to view the details for each backlog item status from this analysis.

Key Insights

This report answers the following business question:

- What's the total number of backlog items by status for a product in a given sprint?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Product Owner • Scrum Master
When do I use this report?	When you need to review the number of backlog items by status.

What can I do with this report?	You can view the:
	• Number of backlog items for each sprint in a given release grouped by status.
	• Backlog item owner
	• Drill down to: view backlog item details for each of the status from this analysis.
	  ◦ Backlog Item Status Analysis having Complete Status Detailed analysis using the # of Completed Backlog Items column.
	  ◦ Backlog Item Status Analysis having Draft Status Detailed analysis using the # of Draft Backlog Items column.
	  ◦ Backlog Item Status Analysis having Ready Status Detailed analysis using the # of Ready Backlog Items column.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Requirements Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Product	• "Product"."Product" • Ascending sort
Release	• "Release"."Release" • Additional ascending sort
Sprint	• "Sprint"."Sprint Name" • Additional ascending sort
Backlog Item Owner	• "Owner"."Backlog Item Owner" • Additional ascending sort
Scrum Master	"Scrum Master". "Scrum Master"
# of Draft Backlog Items	• Formula customized as: IFNULL("Backlog Item Measures"."# of Draft Backlog Items",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red • Action link to the Backlog Items Status Analysis having Draft Status Detailed report
# of Ready Backlog Items	• Formula customized as: IFNULL("Backlog Item Measures"."# of Ready Backlog Items",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red • Action link to the Backlog Items Status Analysis having Ready Status Detailed report
# of DraftCompleted Backlog Items	• Formula customized as: IFNULL("Backlog Item Measures"."# of Completed Backlog Items",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red • Action link to the Backlog Items Status Analysis having Completed Status Detailed report

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Product	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Release	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Sprint Name	Dashboard prompt	• Choice list

Filter on Column	Type	Rules
		• Select multiple values enabled • Values limited by All Prompts

The following table lists the views in the report.

View	Displayed Information
View Name	Backlog Item Status Analysis
View Sections	None
Table Column and Measures	1. Product 2. Release 3. Sprint 4. Backlog Item Owner 5. Scrum Master 6. # of Draft Backlog Items 7. # of Ready Backlog Items 8. # of Completed Backlog Items

Backlog Item Sprint Velocity Analysis: Explained

This topic provides an overview of the Backlog Item Sprint Velocity analysis.

Overview

The Backlog Item Sprint Velocity analysis displays the total number of story points completed in each sprint of a release. This information helps the product owner to plan new work for upcoming releases.

Key Insights

This report answers the following business question:

- What's the total number of story points achieved in each sprint of a release?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Product Owner
When do I use this report?	When you need to: • Review the story points achieved in a release sprint by a scrum master.

FAQ	Answer
	• Plan work for upcoming releases based on the number of backlog items completed in prior and current sprints
What can I do with this report?	• View the number of story points assigned to every scrum master. • Analyze if the work needs to be redistributed between scrum masters.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Requirements Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Product	• "Product"."Product" • Ascending sort
Release	• "Release"."Release" • Additional ascending sort
Backlog Item Status	• "Status"."Backlog Item Status" • Additional ascending sort
Sprint	• "Sprint"."Sprint Name" • Additional ascending sort
Sprint Start Date	• "Sprint"."Sprint Start Date" • Additional ascending sort • Custom date format: M/d/yy h:mm t
Backlog Item Owner	"Owner". "Backlog Item Owner"
Scrum Master	"Scrum Master". "Scrum Master"
Total Story Points	• Formula customized as: IFNULL("Backlog Item Measures"."# of Draft Backlog Items",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Product	Dashboard prompt	• Choice list • Select multiple values enabled

Filter on Column	Type	Rules
		• Values limited by All Prompts
Release	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Backlog Item Status	Dashboard prompt	• Choice list • Select multiple values enabled • Enter values enabled • Values limited by All Prompts

The following table lists the views in the report.

View	Displayed Information
View Name	Backlog Item Sprint Velocity Analysis
View Sections	None
Table Column and Measures	1. Product 2. Release 3. Backlog Item Status 4. Sprint 5. Backlog Item Owner 6. Scrum Master 7. Total Story Points

Backlog Completeness Check Analysis: Explained

This topic provides an overview of the Backlog Completeness Check analysis.

Overview

The Backlog Completeness Check analysis displays the total number of the backlog items with the exceptions for your backlogs. Exceptions include missing user stories, story points, or acceptance criteria. You can drill down to view the details for each kind of exception from this analysis.

Key Insights

This report answers the following business questions:

- Which of my backlog items have exceptions?
- What are the exceptions for my backlog items?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	• Product Owner • Scrum Master
When do I use this report?	When you need to review the completeness of backlog items by product in a release.

What can I do with this report?	You can:
	• View the number of backlog items with exceptions, such as story points, acceptance criteria, and user story.
	• Drill down to:
	  ◦ Backlog Completeness Check Analysis Detailed without Acceptance Criteria analysis using the # of Backlog Items Without Acceptance Criteria column
	  ◦ Backlog Completeness Check Analysis Detailed without Story Points analysis using the # of Backlog Items Without Story Points column
	  ◦ Backlog Completeness Check Analysis Detailed without User Story analysis # of Backlog Items Without User Story column

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Requirements Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Product	• "Product"."Product" • Ascending sort
Release	• "Release"."Release" • Additional ascending sort
Sprint	• "Sprint"."Sprint Name" • Additional ascending sort
Requirement Name	• "Requirement"."Requirement" • Additional ascending sort
Backlog Item Owner	• "Owner"."Backlog Item Owner" • Additional ascending sort
# of Backlog Items	• Formula customized as: IFNULL("Backlog Item Measures"."# of Backlog Items",0) • Value suppression: Repeat

Selected Column	Source and Customized Properties
	• Column data displayed in number format with the 1000s separator enabled and negative values shown in red
# of Backlog Items Without Story Points	• Formula customized as: IFNULL("Backlog Item Measures"."# of Backlog Items Without Story Points",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red • Action link to the Backlog Completeness Check Analysis Detailed without Story Points analysis
# of Backlog Items Without Acceptance Criteria	• Formula customized as: IFNULL("Backlog Item Measures"."# of Backlog Items Without Acceptance Criteria",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red • Action link to the Backlog Completeness Check Analysis Detailed without Acceptance Criteria analysis
# of Backlog Items Without User Story	• Formula customized as: IFNULL("Backlog Item Measures"."# of Backlog Items Without User Story",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red • Action link to the Backlog Completeness Check Analysis Detailed without User Story points analysis

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Product	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Release	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Sprint Name	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts

The following table lists the views in the report.

View	Displayed Information
View Name	Backlog Completeness Check Analysis
View Sections	None
Table Column and Measures	1. Product

View	Displayed Information
	2. Release 3. Sprint 4. Requirement Name 5. Backlog Item Owner 6. # of Backlog Items 7. # of Backlog Items Without Story Points 8. # of Backlog Items Without Acceptance Criteria 9. # of Backlog Items Without User Story

Project Hours by Backlog Item Analysis: Explained

This topic provides an overview of the Project Hours by Backlog Item analysis.

Overview

The Project Hours by Backlog Item analysis displays the effort in hours, actual and remaining, for all backlog items.

Key Insights

This report answers the following business questions:

- What are the planned hours for each backlog item?
- What are the backlog items for my projects in a sprint?
- How much effort is remaining for my backlog items?

Frequently Asked Questions

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Manager
When do I use this report?	When you need to review the planned and remaining effort for your backlog items.
What can I do with this report?	You can analyze if: • The planned hours are sufficient for your backlog items. • Story point estimation for your backlog items is correct.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Requirements Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Product	• "Product"."Product" • Ascending sort
Sprint Name	• "Sprint"."Sprint Name" • Additional ascending sort
Backlog Item Status	• "Status"."Backlog Item Status" • Additional ascending sort
Backlog Item	• "Backlog Item Details"."Backlog Item" • Additional ascending sort
Backlog Item Rank	• "Backlog Item Details"."Backlog Item Rank" • Additional ascending sort • Value suppression: Repeat • Number data format, negative values with one decimal place
Backlog Item Owner	"Owner". "Backlog Item Owner"
Scrum Master	"Scrum Master". "Scrum Master"
Project Name	"Project". "Project Name"
Story Points	• Formula customized as: IFNULL("Backlog Item Measures"."Total Story Points",0) • Value suppression: Repeat • Column data displayed in number format with the 1000s separator enabled and negative values shown in red
Effort in Hours	• Formula customized as: IFNULL("Task Effort Measures"."Planned Hours",0) • Value suppression: Repeat • Column data displayed in custom format with the 1000s separator enabled and negative values shown in red
Actual Hours	• Formula customized as: IFNULL("Task Effort Measures"."Actual Hours",0) • Value suppression: Repeat • Column data displayed in custom format with the 1000s separator enabled and negative values shown in red
Remaining Hours	• Formula customized as: IFNULL("Task Effort Measures"."Remaining Hours",0) • Value suppression: Repeat • Column data displayed in custom format with the 1000s separator enabled and negative values shown in red

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Product	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Sprint	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts
Backlog Item Status	Dashboard prompt	• Choice list • Select multiple values enabled • Values limited by All Prompts

The following table lists the views in the report.

View	Displayed Information
View Name	Project Hours by Backlog Item Analysis
View Sections	None
Table Column and Measures	1. Product 2. Backlog Item Status 3. Sprint Name 4. Backlog Item 5. Backlog Item Owner 6. Scrum Master 7. Story Points 8. Project Name 9. Effort in Hours 10. Actual Hours 11. Remaining Hours

Resource Management

Resource Capacity Planning by Project Role Analysis: Explained

This topic provides an overview of the Resource Capacity Planning by Project Role analysis.

Overview

The Resource Capacity Planning by Project Role analysis displays requested hours, capacity hours, assigned hours, remaining capacity hours, and the capacity surplus or shortfall for project roles for a specified date range. You can drill down to resource assigned hours by project and role, resource capacity planning by role and project, and resource capacity planning by role and resource from this analysis.

Key Insights

This report answers the following business questions:

- What are the capacity hours of my resources?
- Are my resources being optimally utilized?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Resource Manager
When do I use this report?	When you need to review your: • Resource utilization • Capacity planning

What can I do with this report?	You can:
	• Review if your resources are being optimally utilized.
	• Drill down to the Resource Capacity Planning by Role and Project analysis using the Total Requested Hours column.
	• Drill down into:
	  ◦ Resource Assigned Hours by Project and Role analysis.
	  ◦ Resource Capacity Planning by Role and Resource analysis.

What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Resource Management - Resource Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Role	"Project Role". "Project Role Name"
Total Requested Hours	• Formula customized as:

Selected Column	Source and Customized Properties
	Filter("Project Resource Request"."Total Requested Time" USING "- Project Request Type"."Project Request Type" = 'NEW_RESOURCE' AND "- Project Request Status"."Project Request Status" IN ('OPEN','PROPOSED')) • Total after • Action link to the Resource Capacity Planning by Role and Project analysis
Total Capacity Hours	• "Project Resource Supply"."Capacity Time" • Total after
Total Assigned Hours	• "Project Resource Assignment"."Confirmed Assignment Time" • Total after
Remaining Capacity Hours	• "Project Resource Supply"."Capacity Time Excluding Assignments" • Total after
Capacity Surplus or Shortfall	• Formula customized as: "Project Resource Supply"."Capacity Time Excluding Assignments" - "Project Resource Request"."Total Requested Time" • Ascending sort • Total after

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Role Name	Dashboard prompt	• Choice list • Select multiple values enabled
Date	Dashboard prompt	• Calendar • Required • Is between field

The following table lists the views in the report.

View	Displayed Information
View Name	Resource Capacity Planning by Project Role
View Sections	• Table • Graph
Table Column and Measures	1. Project Role 2. Total Requested Hours 3. Total Capacity Hours 4. Total Assigned Hours 5. Remaining Capacity Hours 6. Capacity Surplus or Shortfall

Resource Pool Actual Utilization by Resource and Month Analysis: Explained

This topic provides an overview of the Resource Pool Actual Utilization by Resource and Month analysis.

Overview

The Resource Pool Actual Utilization by Resource and Month analysis displays monthly actual hours and utilization percentages for a resource pool and the specified date range. You can drill down to resource actual utilization by project or event and month from this analysis.

Key Insights

This report answers the following business question:

Are my resources optimally utilized?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Resource Manager
When do I use this report?	When you need to review your resource actual utilization.
What can I do with this report?	You can: • Review if your resources are meeting their target utilization. • Drill down to the Resource Actual Utilization by Project or Event and Month analysis using the Resource column.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Resource Management - Resource Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Resource Pool	"- Resource Pool". "Resource Pool Name"

Selected Column	Source and Customized Properties
Resource	• "Resource"."Resource Name" • Ascending sort • Action link to the Resource Capacity Planning by Role and Project analysis
Month	Formula customized as: MONTHNAME("Time". "Calendar Month End Date") ||' '| | CAST(YEAR("Time""Calendar Month End Date") AS char)
Year	• "Time"."Calendar Year" • Additional ascending sort
Actual Hours	"- Project Resource Actual Measures". "Actual Time"
Actual Utilization	"Project Resource Utilization". "Actual Utilization Percentage"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Resource Pool	Dashboard prompt	• Choice list • Select multiple values enabled
Report Date	Dashboard prompt	• Calendar • Required • Is between field

The following table lists the views in the report.

View	Displayed Information
View Name	Resource Pool Actual Utilization by Resource and Month
View Sections	• Table • Pivot table

Table Column and Measures	1. Resource Pool
	2. Resource
	3. Month and Year
	    a. Actual Hours
	    b. Actual Utilization

Resource Pool Projected and Actual Utilization by Resource Analysis: Explained

This topic provides an overview of the Resource Pool Projected and Actual Utilization by Resource analysis.

Overview

The Resource Pool Projected and Actual Utilization by Resource analysis displays resource pool projected hours and utilization percentages, actual hours and utilization percentages, and variance hours by resource for specified date ranges.

Key Insights

This report answers the following business questions:

- Are my resources being effectively utilized?
- Which of my resources can be better utilized?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Resource Manager
When do I use this report?	When you need to review and compare your projected and actual resource utilization.
What can I do with this report?	You can: • Identify possibilities for optimal resource utilization. • Review variance between projected and actual hours.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Resource Management - Resource Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Resource Pool	• "- Resource Pool"."Resource Pool Name"

Selected Column	Source and Customized Properties
	• Total after
Resource	"Resource". "Resource Name"
Projected Hours	• Formula customized as: "Project Resource Supply"."Capacity Time" - "Project Resource Supply"."Capacity Time Excluding Assignments" • Value suppression: Repeat
Projected Utilization	• "Project Resource Utilization"."Projected Utilization Percentage" • Value suppression: Repeat
Actual Hours	• "- Project Resource Actual Measures"."Utilizable Actual Time" • Value suppression: Repeat
Actual Utilization	• "Project Resource Utilization"."Actual Utilization Percentage" • Value suppression: Repeat
Variance Hours	• Formula customized as: "- Project Resource Actual Measures"."Utilizable Actual Time" - ("Project Resource Supply"."Capacity Time" - "Project Resource Supply"."Capacity Time Excluding Assignments") • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Resource Pool Name	Dashboard prompt	• Choice list • Select multiple values enabled
Report Date	Dashboard prompt	• Calendar • Required • Is between field

The following table lists the views in the report.

View	Displayed Information
View Name	Resource Pool Projected and Actual Utilization by Resource
View Sections	None
Table Column and Measures	1. Resource Pool 2. Resource 3. Projected Hours 4. Projected Utilization 5. Actual Hours 6. Actual Utilization 7. Variance Hours

Project Resource Request Forecast Revenue Analysis: Explained

This topic provides an overview of the Project Resource Request Forecast Revenue analysis.

Overview

The Project Resource Request Forecast Revenue analysis displays the cost, revenue, and margin forecasts for requests in Open and Resource Proposed status for a specified date range. You can drill down to the requested resource forecast revenue details from this analysis.

Key Insights

This report answers the following business questions:

- Which requests are in Open or Resource Proposed status?
- What is the forecasted revenue and margin for such resource requests?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Resource Manager
When do I use this report?	When you need to review cost, revenue, and margin for your resource requests.
What can I do with this report?	You can: • View requests in Open and Resource Proposed statuses. • Review forecasted margins for such requests. • Drill down to the Requested Resource Forecast Revenue Details analysis using the Project Name column.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Resource Management - Resource Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	• "Project"."Project Name"

Selected Column	Source and Customized Properties
	• Action link to the Requested Resource Forecast Revenue Details analysis
Total Requested Hours	• "Project Resource Request"."Total Requested Time" • Total after • Value suppression: Repeat
Target Profit	• "Project Resource Request"."Target Profit" • Value suppression: Repeat
Target Revenue	• "Project Resource Request"."Target Revenue" • Value suppression: Repeat
Target Cost	• "Project Resource Request"."Target Cost" • Value suppression: Repeat
Currency	"- Project Request Details". "Request Cost Rate Currency"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	• Choice list • Select multiple values enabled
Request Start Date	Dashboard prompt	• Calendar • Required • Is between field
Project Resource Request Target Cost Rate Currency	Dashboard prompt	• Choice list • Select multiple values enabled • Default selection SQL: Select MAX(" Project Request Details"."Request Cost Rate Currency") from Project Resource Management - Resource Management Real Time
Project Request Status	Filter	Equals 'OPEN' or 'PROPOSED'

The following table lists the views in the report.

View	Displayed Information
View Name	Project Resource Request Forecast Revenue
View Sections	• Table • Graph
Table Column and Measures	1. Project Name 2. Total Requested Hours 3. Target Profit 4. Target Revenue

View	Displayed Information
	5. Target Cost 6. Currency

Requested Resource Forecast Revenue Details Analysis: Explained

This topic provides an overview of the Requested Resource Forecast Revenue Details analysis.

Overview

The Requested Resource Forecast Revenue Details analysis displays the forecast revenue details for requests for a project selected in the Project Resource Request Forecast Revenue analysis. You can drill down to the Requested Resource Forecast Revenue Details analysis by clicking on the Project Name column data on the Project Resource Request Forecast Revenue analysis.

Key Insights

This report answers the following business questions:

- What's the forecast revenue for the requests on a project?
- What's the target revenue and profit margin for the requests on a project?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Resource Manager
When do I use this report?	When you need to review the forecast revenue details of requests for a specific project.
What can I do with this report?	You can review the following for your requests: • Total Requested Time • Target Profit • Target Margin • Target Revenue • Target Cost
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Resource Management - Resource Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Name	• "Project"."Project Name" • Ascending sort
Project Role	"Project Role". "Project Role Name"
Request Name	"- Project Request Details". "Request Name"
Request Start	• "- Project Request Start Date"."Request Start Date" • Additional ascending sort
Request Finish	"- Project Request End Date". "Request End Date"
Request Status	"- Project Request Status". "Project Request Status Name"
Staffing Owner	"- Project Resource Staffing Owner". "Resource Staffing Owner Name"
Project Manager	"Project". "Primary Project Manager"
Total Requested Time	• "Project Resource Request"."Total Requested Time" • Value suppression: Repeat
Target Profit	• "Project Resource Request"."Target Profit" • Value suppression: Repeat
Target Margin	• "Project Resource Request"."Target Margin" • Value suppression: Repeat
Target Revenue	• "Project Resource Request"."Target Revenue" • Value suppression: Repeat
Target Cost	• "Project Resource Request"."Target Cost" • Value suppression: Repeat
Target Cost Rate	• "Project Resource Request"."Target Cost Rate" • Value suppression: Repeat
Target Cost Rate Currency	"- Project Request Details". "Request Cost Rate Currency"
Target Bill Rate	• "Project Resource Request"."Target Bill Rate" • Value suppression: Repeat
Target Bill Rate Currency	"- Project Request Details". "Request Bill Rate Currency"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Request Status	Filter	Equals 'OPEN' or 'PROPOSED'
Project Name	Filter	Prompted
Request Start Date	Filter	Prompted

The following table lists the views in the report.

View	Displayed Information
View Name	Requested Resource Forecast Revenue Details
View Sections	None
Table Column and Measures	1. Project Name 2. Project Role 3. Request Name 4. Request Start 5. Request Finish 6. Request Status 7. Staffing Owner 8. Project Manager 9. Total Requested Time 10. Target Profit 11. Target Margin 12. Target Revenue 13. Target Cost 14. Target Cost Rate 15. Target Cost Rate Currency 16. Target Bill Rate 17. Target Bill Rate Currency

Projected Revenue Shortfall by Resource Analysis: Explained

This topic provides an overview of the Projected Revenue Shortfall by Resource analysis.

Overview

The Projected Revenue Shortfall by Resource analysis displays target hours, projected hours, variance hours, and projected revenue shortfall for resources that don't meet their target utilization in a specified resource pool.

Key Insights

This report answers the following business questions:

- Which resources will not meet their target utilization in the next period?

- What's the projected revenue shortfall due to such resources?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Resource Manager
When do I use this report?	When you need to track underutilized resources.
What can I do with this report?	You can: • Identify resources that don't meet their target utilization. • View projected revenue shortfall due to under utilization of resources.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Resource Management - Resource Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Project Role	"Resource". "Resource Primary Role Name"
Resource	"Resource". "Resource Name"
Resource Pool	"- Resource Pool". "Resource Pool Name"
Target Hours	• "Project Resource Supply"."Target Time" • Value suppression: Repeat
Projected Hours	• "Project Resource Assignment"."Confirmed Assignment Time" • Value suppression: Repeat
Variance Hours	• Formula customized as: IfNull("Project Resource Assignment"."Confirmed Assignment Time",0) - "Project Resource Supply"."Target Time" • Value suppression: Repeat
Resource Bill Rate	"Resource". "Resource Bill Rate"

Selected Column	Source and Customized Properties
Resource Bill Rate Currency	"Resource". "Resource Bill Rate Currency"
Projected Revenue Shortfall	• Formula customized as: IfNull(("Project Resource Assignment"."Confirmed Assignment Time" * "Resource"."Resource Bill Rate") , 0) - ("Resource"."Resource Bill Rate" * "Project Resource Supply"."Target Time") • Ascending sort • Value suppression: Repeat

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Resource Pool Name	Dashboard prompt	• Choice list • Select multiple values enabled
Report Date	Dashboard prompt	• Calendar • Required • Is between field

The following table lists the views in the report.

View	Displayed Information
View Name	Projected Revenue Shortfall by Resource
View Sections	None
Table Column and Measures	1. Project Role 2. Resource 3. Resource Pool 4. Target Hours 5. Projected Hours 6. Variance Hours 7. Resource Bill Rate 8. Resource Bill Rate Currency 9. Projected Revenue Shortfall

Task Management

My Upcoming Tasks Analysis: Explained

This topic provides an overview of the My Upcoming Tasks analysis.

Overview

The My Upcoming Tasks analysis displays the project task names, task start and finish dates, and percentage of tasks complete by task type for incomplete tasks that are due within the entered date range.

Key Insights

This report answers the following business questions:

- Which project tasks are due in 7 days?
- In how many days are my project tasks due?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Team Member
When do I use this report?	When you need to track your project tasks.
What can I do with this report?	You can review: • Due dates for your tasks. • Percentage of tasks complete for your projects.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Task Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Days Due	"Task Management Measures". "Days Due"
Task Type Name	"Task Type"."Task Type Name"

Selected Column	Source and Customized Properties
Project Name	"Project". "Project Name"
Task Name	"Task"."Task Name"
Task Start Date	"- Task Start Date"."Task Start Date"
Task Finish Date	"- Task End Date"."Task Finish Date"
Percent Complete	"Task Management Measures". "Percent Complete"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Owner	Dashboard prompt	Choice list
Days Due	Dashboard prompt	Text field
Days Due	Filter	• Is not null • Is between 0 and 7
Percent Complete	Filter	Not 100

The following table lists the views in the report.

View	Displayed Information
View Name	My Upcoming Tasks
View Sections	None
Table Column and Measures	1. Days Due 2. Task Type Name 3. Project Name 4. Task Name 5. Task Start Date 6. Task Finish Date 7. Percent Complete

Project Work Coming Due Analysis: Explained

This topic provides an overview of the Project Work Coming Due analysis.

Overview

The Project Work Coming Due analysis displays the project tasks, milestones, and action items that are due for your projects within the entered date range.

Key Insights

This report answers the following business questions:

- Which project tasks are incomplete?
- Which project tasks, milestones, and action items are due?

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics pane - Shared Folders - Projects - Project Execution Sample Reports
Who uses this report?	Project Team Member
When do I use this report?	When you need to track your project tasks, milestones, and action items.
What can I do with this report?	You can review: • Project tasks, milestones, and action items that are due. • Percentage of project tasks that is complete.
What type of report is this?	Oracle Transactional Business Intelligence

Related Subject Area

This report uses the Project Management - Task Management Real Time subject area.

Report Details

The following table lists the selected columns, underlying formulas, and customized column properties for the report.

Selected Column	Source and Customized Properties
Task Type	"Task Type"."Task Type Name"
Task Name	"Task"."Task Name"

Selected Column	Source and Customized Properties
Owner	"Task Owner"."Task Owner Name"
Days Due	• "Task Management Measures"."Days Due" • Ascending sort
Percent Complete	"Task Management Measures". "Percent Complete"

The following table lists the prompts and filters used in the report.

Filter on Column	Type	Rules
Project Name	Dashboard prompt	Choice list
Days Due	Dashboard prompt	• Text field • Operator: Less than or equal to
Percent Complete	Filter	Not 100

The following table lists the views in the report.

View	Displayed Information
View Name	Project Work Coming Due
View Sections	None
Table Column and Measures	1. Task Type 2. Task Name 3. Owner 4. Days Due 5. Percent Complete

FAQs

How can I report on all the tasks of a project?

You can use the predefined Project Tasks analysis.

Alternatively, you can create a new report using an Oracle Fusion Project Portfolio Management subject area that has the Project Name and Task Name dimensions.

For example, you can create a report using the Project Costing - Actual Costs Real Time subject area to view cost by project and task.

Why doesn't employee name appear in my analyses?

You must have the required security profile to view the employee names in your analyses. Contact your application administrator to grant you the required access.

Related Topics

- Setting Up Security Profile to View Employee Names in Analyses: Procedure

Can I query across multiple subject areas?

Yes, you can create reports that span multiple subject areas if the selected dimension attributes are common across all areas.

For more information, see Guidelines for creating cross subject area reports in Oracle Transactional BI (OTBI). [ID 1567672.1]

Why don't the dates in my analysis match the actual values?

The dates in your analysis display according to the default time zone. Click the drop-down list next to your name in the global area to open your account. On the Preferences tab, change the time zone as required.

Note: You must be an administrator to edit the time zone.

What happens if I synchronize project updates?

The application synchronizes updates to the project structure with budgets and forecasts, and denormalizes the modified task hierarchy for reporting in Oracle Transactional Business Intelligence. A project application administrator or project manager can synchronize project updates for projects created using Project Financial Management applications. Alternatively, you can schedule the Denormalize Task Structure Hierarchies for Business Intelligence process to run periodically from the Scheduled Processes page.

If you manage projects using Project Execution Management applications, you can run the process only from the Scheduled Processes page.

Related Topics

- Task Structure Hierarchies: How They're Denormalized

4 Configuring Descriptive Flexfields

Configuring Descriptive Flexfields for Transactional Business Intelligence: Overview

Configure descriptive flexfields to track unique information not typically found on business forms.

Descriptive flexfields can store several important details on a form without cluttering it. For example, several details may make an asset form heavy and unmanageable. However, the user still needs to access those details and therefore, they must be present on the form. In such cases, descriptive flexfields are convenient to use and are easy to manage.

Descriptive flexfields provide a way for you to add custom attributes to entities and to define validation and display properties for them. A descriptive flexfield is a logical grouping of attributes (segments) that are mapped to a set of extension columns which are shipped as part of Oracle Applications Cloud tables.

Configuring Descriptive Flexfield Segments: Procedure

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

Configuring a Descriptive Flexfield Segment

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

To configure available descriptive flexfield segments:

1. Navigate to the Setup and Maintenance window.
2. Navigate to the Manage Descriptive Flexfields window.
3. If the **BI Enabled** option is cleared, select it.
4. Select the options for deployment of the descriptive flexfields.

Setting Descriptive Flexfields as BI-Enabled: Procedure

If a descriptive flexfield is already defined, you can enable it for use in Business Intelligence reports. Not all descriptive flexfields are supported for Business Intelligence.

Setting a Flexfield as BI-Enabled

1. Navigate to **Setup and Maintenance** work area.
2. Navigate to the **Edit Descriptive Flexfields** window.
3. Enter the descriptive flexfield name.
4. Check the **BI Enabled** option on the desired descriptive flexfields. If the option is unavailable, the flexfield is a non-supported entity.

5. Click **OK**.
6. Click **Save**.

Importing Changes to Flexfields Automatically: Procedure

To import flexfield changes, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process. Running the process disconnects all users from the server. Don't run this process when maintenance operations or updates are being performed on the server.

Running the Process

To run the process:

1. In the **Scheduled Processes** window, select **Search and Select: Name**.
2. Select **Search and Select: Name**.
3. Highlight **Import Oracle Fusion Data Extensions for Transactional Business Intelligence**.
4. Click **OK**.
5. Schedule to run the process.

Process Status Conditions

The process status displays one of the following conditions:

- INIT: The process has just begun and is waiting for the extender command line JAR to update the status with more details.
- COMPLETED_NO_EXTENSION_NEEDED: No new flexfield changes were detected in any of the Oracle Applications Cloud sources; because the Oracle Business Intelligence is already synchronized with all flexfield changes, no changes were made in the Oracle Business Intelligence.
- COMPLETED: Oracle Business Intelligence was successfully updated with flexfield changes and uploaded into the Oracle Business Intelligence Server.
- COMPLETED: PROCESS_ERRORS: Oracle Business Intelligence was updated with the flexfield changes but with some warnings that require manual intervention.
- FAILED: Error conditions exist that require manual intervention.

Successful Import Process

If the import process is successful, you can perform the following actions:

- Query subject areas by segment dimensions such as Balancing Segment and Cost Center.
- Access DFF attributes for analyses.
- Use the General Ledger - Balances Real Time subject area to query Oracle Essbase cubes.

Disabling Descriptive Flexfields as BI-Enabled: Procedure

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling descriptive flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence.

Disabling Descriptive Flexfields

To disable descriptive flexfields as BI-enabled:

1. Navigate to **Setup and Maintenance**.
2. Navigate to the **Edit Descriptive Flexfields** window.
3. Enter the **Descriptive Flexfield Name**.
4. Deselect the **BI Enabled** option on the desired descriptive flexfields.
5. Click **OK**, then **Save**.

Descriptive Flexfields for Oracle Project Portfolio Management: Overview

The table below lists the descriptive flexfields and the subject areas in which you can use these flexfields. To view the descriptive flexfield columns, navigate to the appropriate folder within the relevant subject area.

Flexfield	Subject Area	Folder
PJB_ INVOICE_ HEADERS_FLEX	Project Billing - Invoices Real Time	Invoice Details
PJB_ INVOICE_ LINES_FLEX	Project Billing - Invoices Real Time	Invoice Details
PJB_ BILLING_ EVENTS_FLEX	• Project Billing - Events Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time	Event Details
PJC_ EXP_ ITEMS_ DESC_FLEX	• Project Costing - Actual Costs Real Time • Project Costing - Expenditure Item Performance - Real Time	For Actual Costs: • Expenditure Item and Cost Distribution Details For Expenditure Item Performance: • Expenditure Item Details
PJC_ TXN_ XFACE_ DESC_FLEX	Project Costing - Unprocessed Transactions Real Time	Unprocessed Transaction Details
PJF_ EXP_ CATEGORIES_ DESC_FLEX	• Project Billing - Invoices Real Time • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time	Expenditure Type

Flexfield	Subject Area	Folder
	• Project Costing - Assets Real Time	
PJF_ EXP_ TYPES_ DESC_FLEX	• Project Billing - Invoices Real Time • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time • Project Costing - Assets Real Time	Expenditure Type
PJF_ NONLAB_ RES_DESC_FLEX	• Project Costing - Actual Costs Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time	Nonlabor Resource
PJF_ PROJECTS_ DESC_FLEX	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Control - Forecasts Real Time • Project Control - Progress Real Tim • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time • Project Costing - Assets Real Time • Project Management - Change Management Real Time • Project Management - Opportunity Integration Real Time • Project Management - Planning Real Time • Project Management - Project Hierarchy Real Time • Project Management - Project Resources Real Time • Project Management - Project Work Items Real Time • Project Management - Requirements Real Time • Project Resource Management - Resource Management Real Time • Project Management - Task Management Real Time • Projects - Cross Subject Area Analysis - Real Time	Project

Flexfield	Subject Area	Folder
	• Projects - Grants Management - Award Analysis Real Time • Projects - Grants Management - Award Funding Real Time	
PJF_ PROJECT_ TYPES_ DESC_FLEX	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Control - Forecasts Real Time • Project Control - Progress Real Tim • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time • Project Costing - Assets Real Time • Projects - Cross Subject Area Analysis - Real Time • Projects - Grants Management - Award Analysis Real Time • Projects - Grants Management - Award Funding Real Time	Project Type Attributes
PJF_ TASK_ STRUCTURE_DFF	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Control - Forecasts Real Time • Project Control - Progress Real Tim • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time • Project Costing - Assets Real Time • Project Management - Change Management Real Time • Project Management - Opportunity Integration Real Time • Project Management - Planning Real Time • Project Management - Project Work Items Real Time • Project Management - Requirements Real Time • Project Management - Task Management Real Time	Task

Flexfield	Subject Area	Folder
	• Projects - Cross Subject Area Analysis - Real Time	
PJF_ WORK_ TYPES_ DESC_FLEX	• Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time	Work Type
PJO_ PLANNING_ OPTIONS_DFF	Project Control - Budgets Real Time	Budget Version Planning Options
PJO_ PLAN_ LINES_DFF	Project Control - Budgets Real Time	Budget Line Record Information
ContractHeaderFlexfield	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Costing - Actual Costs Real Time • Project Costing - Expenditure Item Performance - Real Time • Projects - Cross Subject Area Analysis - Real Time • Projects - Grants Management - Award Funding Real Time	Project Contract Header Details
OKC_ LINES_ DESC_FLEX	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Costing - Actual Costs Real Time • Project Costing - Expenditure Item Performance - Real Time • Projects - Cross Subject Area Analysis - Real Time • Projects - Grants Management - Award Funding Real Time	Project Contract Line Details
PJF_ CLASS_ CATEGORIES_ DESC_FLEX	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Control - Forecasts Real Time • Project Control - Progress Real Tim • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time	Project Classification

Flexfield	Subject Area	Folder
	• Project Costing - Unprocessed Transactions Real Time • Project Costing - Assets Real Time • Projects - Cross Subject Area Analysis - Real Time • Projects - Grants Management - Award Analysis Real Time • Projects - Grants Management - Award Funding Real Time	
PJF_ CLASS_ CODES_ DESC_FLEX	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Control - Forecasts Real Time • Project Control - Progress Real Tim • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time • Project Costing - Assets Real Time • Projects - Cross Subject Area Analysis - Real Time • Projects - Grants Management - Award Analysis Real Time • Projects - Grants Management - Award Funding Real Time	Project Classification
PJF_ PROJECT_ CLASS_ CODE_ DESC_FLEX	• Project Billing - Events Real Time • Project Billing - Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Control - Forecasts Real Time • Project Control - Progress Real Tim • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Expenditure Item Performance - Real Time • Project Costing - Unprocessed Transactions Real Time • Project Costing - Assets Real Time • Projects - Cross Subject Area Analysis - Real Time • Projects - Grants Management - Award Analysis Real Time • Projects - Grants Management - Award Funding Real Time	Project Classification

Flexfield	Subject Area	Folder
GMS_ AWARD_ PERSONNEL_DFF	Projects - Grants Management - Award Funding Real Time	Personnel
GMS_ AWARD_ PROJECTS_DFF	Projects - Grants Management - Award Funding Real Time	Award Project
GMS_ INSTITUTIONS_ DFF	• Projects - Grants Management - Award Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Unprocessed Transactions Real Time	Institution
GMS_ AWARD_ HEADERS_DFF	• Projects - Grants Management - Award Funding Real Time • Project Billing - Invoices Real Time • Project Billing - Revenue Real Time • Project Control - Budgets Real Time • Project Costing - Actual Costs Real Time • Project Costing - Commitments Real Time • Project Costing - Unprocessed Transactions Real Time • Projects - Grants Management - Award Analysis Real Time • Projects - Cross Subject Area Analysis - Real Time	Award

5 Analytics Customization

Creating and Editing Analytics: Highlights

Edit and create custom analytics to provide ad hoc reporting on your transactional data. The predefined analyses and dashboards help answer many of your business questions, but you can also create your own to meet custom requirements.

This table gives a just a few examples of creating or editing analytics.

Task	Example
Create an analysis	Your team needs a simple list of all your accounts, sorted by account ID. You include the account name, ID, and address in a new analysis, and add sorting on the ID column.
Create a view	A predefined analysis has a bar graph. You save a custom version of this analysis with a table view and add it below the graph.
Create a view selector	You later decide that you want to toggle between viewing a table and a graph. You add a view selector that includes the table and graph views.
Edit a dashboard prompt	A predefined dashboard has a Start Date prompt. You make a copy of the dashboard and replace Start Date with a date range prompt.
Create a dashboard	You create a dashboard that includes an analysis and a report to view both together.

Tip: A wizard in the Reports and Analytics pane is available to help you create or edit analyses.

Data Source Customization

Administrators can customize the business intelligence (BI) repository to determine the columns available for you to use.

- They enable flexfields (which support custom attributes) for BI, and import them into the repository.
- You can then select attributes from flexfields to include in your analyses.

Related Topics

- Reports and Analytics Pane: Explained
- Data Structure for Analytics: Explained
- Configuring Flexfields for Use in Analyses: Overview

Analyses

Creating and Editing Analyses Using a Wizard: Procedure

You can use a wizard that guides you through creating and editing analyses. Even though the wizard doesn't give you all available features, you can still use it to make typical changes, for example adding views or filters. For other tasks, such as creating dashboards or deleting analyses, use the advanced business intelligence features.

Creating an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click **Create** and select **Analysis**.
3. Select the subject area that has the columns you want for your analysis.
4. Optionally, add more subject areas or remove any that you no longer need.
5. Select the columns to include, set options for each column, and click **Next**.
6. Optionally, enter a title to appear at the top of the analysis, above the analysis name that you enter in the last step.
7. Select the type of table or graph to include, specify the layout of the views, and click **Next**.

   Note: At any point after this step, you can click **Finish** to go to the last step, to save your analysis.

8. Optionally, set more options for the table or graph, and click **Next**.
9. Optionally, add sorts or filters based on any of the columns you included, and click **Next**.
10. If you have a table, optionally define conditional formatting for select columns, for example to display amounts over a certain threshold in red. Click **Next**.
11. Enter the name of your analysis and select a folder to save it in.
12. Click **Submit**.

Editing an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics if available in other work areas where you can find the analysis.
2. Select your analysis in the pane and click **Edit**.
3. Perform steps 4 through 10 from the preceding Creating an Analysis task, as needed.
4. To update an existing analysis, select the same name in the same folder. To save this analysis as a new copy, either name it with a new name or save it in a new folder.
5. Click **Submit**.

Related Topics

- Reports and Analytics Pane: Explained
- Saving Analytics and Reports: Points to Consider
- Data Structure for Analytics: Explained

Creating and Editing Analyses with Advanced Features: Procedure

Even though you can use a wizard to create or edit analyses, you might have to use advanced features for complicated analyses or specific requirements. For example, you can create view selectors so that users can toggle between views within an analysis, or define criteria for filters using SQL statements.

You can also perform other actions on analyses, for example delete them or copy and paste them within the business intelligence catalog.

Creating or Editing an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click the **Browse Catalog** button.
3. Click the **New** button, select **Analysis** under **Analysis and Interactive Reporting**, and select a subject area.

   Or, select your analysis in the Folders pane and click **Edit**.
4. Use the tabs as described in this table.

Tab	Task
Criteria	Select and define the columns to include. Add filters.
Results	Add views and set options for results.
Prompts	Define prompts to filter all views in the analysis.
Advanced	View or update the XML code and logical SQL statement that the analysis generates. Set options related to query performance.

5. Save your analysis.

Performing Other Actions on an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas where you can find the analysis.
2. Select your analysis in the pane and click **More**.
3. Click **More** for your analysis and select the desired action, for example **Delete** or **Copy**.

Related Topics

- Reports and Analytics Pane: Explained
- Data Structure for Analytics: Explained
- Saving Analytics and Reports: Points to Consider

Creating an Analysis to View Resource Qualifications from HCM: Procedure

Create a resource qualification analysis in the Reports and Analytics work area to view real-time qualifications for project resources from the Human Capital Management (HCM) application.

When you create a resource qualification analysis, you select the Resource Name and Resource Qualification columns to display the qualifications associated to the resource. Resource Name and Resource Qualification dimensions are valid for the various facts associated with the Project Resource Management - Resource Management Real Time subject area. When you use Oracle Transactional Business Intelligence (OTBI) for a cross-dimension query, OTBI selects the fact column from the implicit fact column defined for a subject area to display the result. For the Project Resource Management - Resource Management Real Time subject area, the implicit fact column defined is **# of Requests**. Hence, OTBI displays the qualifications from the requests to which the resource is associated and not from the HCM application. For the analysis to display the qualifications as defined in their HCM Talent Profile, you must add the **# of Qualifications** column that is the relevant measure.

Creating a Resource Qualification Analysis

1. Navigate to the Reports and Analytics work area.
2. Click **Browse Catalog**.
3. From the New menu, click **Analysis**.
4. From Select Subject Area window, click **Project Resource Management - Resource Management Real Time**.
5. In the Subject Area pane, expand:
    a. Resource folder and double-click **Resource Name**.
    b. Qualification folder and double-click **Qualification Name**.
    c. Project Resource Supply folder and double-click **# of Qualifications**.
6. In the Selected Columns section, from the Resource Name column criteria, click **Filter**.
7. In the New Filter window, select a resource from the Value list, and click **OK**.
8. In the Selected Columns section, from the # of Qualifications column criteria, click **Column Properties**.
9. On the Column Format tab, select the Hide check box and click **OK** to hide the # of Qualifications column in the analysis.
10. Click **Save Analysis**.
11. By default, the application selects the My Folders folder. Enter a name for your analysis, such as Resource Qualification Analysis, in the Name field.
12. Click Catalog menu.
13. Expand My Folders and open the Resource Qualification Analysis. The analysis contains the following details for your selected resources:
    - Resource Name
    - Qualification Name

Dashboards

Creating and Editing Dashboards: Procedure

You can create and edit dashboards to determine their content and layout. In addition to objects in the business intelligence (BI) catalog, such as analyses, reports, and prompts, you can add text, sections, and more to a dashboard.

Creating a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.

2. Click **Browse Catalog**.
3. Click **New** and select **Dashboard** under **Analysis and Interactive Reporting**.
4. Enter the dashboard's name and description, and select a folder to save in.
5. With the **Add content now** option selected, click **OK**.
6. Optionally, add more pages, or tabs, within the dashboard.
7. Drag and drop items from the Dashboard Objects or Catalog pane to add content to a page.
8. Click **Save**.

Note: The first dashboard page is saved with the **page 1** name by default. To rename this page:

1. Click the **Catalog** link.
2. In the Folders pane, select your dashboard.
3. For **page 1**, click **More** and select **Rename**.
4. Enter the new name and click **OK**.

Editing a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas where you can find the dashboard.
2. Select your dashboard in the pane and click **More**.
3. Click **Edit**.
4. Perform steps 5 and 6 from the preceding Creating Dashboards task, and make other changes as needed, for example:
    - Remove content from the dashboard.
    - Drag and drop within a page to move content around.
    - Change the layout of a page.

Related Topics

- Saving Analytics and Reports: Points to Consider
- Reports and Analytics Pane: Explained

FAQs

Why can't I see the current set of active project and task codes in my analyses?

When project application administrators create new project or task codes, the codes don't appear in the OTBI subject areas. The administrator must first clear the internal business intelligence (BI) server cache for the codes to display in the OTBI subject areas. Running a SQL command clears the BI server cache.

Follow these steps to clear the cache.

1. Navigate to the Reports and Analytics work area.

2. Click **Browse Catalog**.
3. On the Oracle BI Catalog page, in the global area, click the **Administration** link.
4. On the Administration page, click the **Issue SQL** link.
5. In the Issue SQL command window, enter the **`call SAPurgeInternalCache('1');`** command.
6. Click **Issue SQL**.
7. Close all your browser sessions and log in again. You can now see the new project and task codes in the OTBI subject areas.

6 Reports Customization

Creating and Editing Reports: Explained

Use reports to generate and print documents for internal operations, external business transactions, or legal requirements. To meet specific requirements, you may need to create or edit reports to capture different data, or present data in another way.

Report Components

Each report has components that you can customize, as described in this table:

Report Component	Description	Tool for Customizing
Data model	Defines the data source, data structure, and parameters for the report. Multiple reports can use the same data model. Each report has one data model.	Data model editor in the application
Layout	Defines the presentation, formatting, and visualizations of the data. A report can have multiple layouts. There are different types of layout templates, for example Excel and RTF.	Depending on the template file type: • **XPT:** Layout editor in the application • **RTF:** Microsoft Word • **PDF:** Adobe Acrobat Professional • **Excel:** Microsoft Excel • **eText:** Microsoft Word
Properties	Specifies formatting and other settings for the report.	Report editor in the application

What You Can Create or Edit

This table gives just a few examples of creating or editing reports.

Task	Example
Edit the layout of a report.	Add your company logo to the report output.
Add a new layout to a report.	Design a new layout template that provides less detail than the existing template.
Edit a data model.	Add two fields to the data model used by a report so you can add those new fields to a custom layout for the report.
Create a new report based on a new data model.	Create a new data model based on data from an external system, and create reports using the custom data model.

Related Topics

- Customizing Data Models: Procedure

Accessing Report Components to Customize: Points to Consider

To create or edit reports, you must access the business intelligence (BI) catalog. In the catalog, objects of type Report represent the report definition, which includes report properties and layouts. Data models are separate objects in the catalog, usually stored in subfolders called Data Models.

Accessing the BI Catalog

You can access the BI catalog in any of the following ways:

- In the Reports and Analytics pane, click **Browse Catalog** to open the BI catalog, and find your report or data model in the Folders pane.
- In the Reports and Analytics pane, find your report and select **More** to go to the report directly in the catalog. The data model associated with the report should be in the Data Models subfolder within the same folder as the report.
- Sign in to the application directly (for example: `http://host:port/analytics/saw.dll`) to open the catalog.
- Sign in to the BI server directly (for example: `http://hostname.com:7001/xmlpserver`) to open the catalog.
  - Alternatively, once you are in the catalog using another method, for example, through the Reports and Analytics pane, change the final node of the URL. For example, change (`http://host:port/analytics/saw.dll`) to `xmlpserver`. So the URL you use would be: `http://host:port/xmlpserver`.

Predefined Reports

A special Customize option is available only:

- For predefined reports, not data models.
- Through direct access to the BI server using the `/xmlpserver` URL. When you find your report in the BI catalog, select **Customize** from the **More** menu.

The Customize option automatically creates a custom copy of a predefined report and stores it in the **Shared Folders - Custom** folder within the catalog. The new report is linked to the original, so that when users open or schedule the original, they are actually using the custom version.

If you don't have access to the Customize option or don't want the original version linked to the new report, then make a copy of the predefined report and save it in the Custom folder.

Predefined Data Models

Don't edit predefined data models. Instead, copy the data model into the Custom folder and edit the copy.

Related Topics

- Saving Analytics and Reports: Points to Consider

- What Happens to Customized Analytics and Reports When an Update Is Applied?

Using the Customize Option for Predefined Reports: Points to Consider

The Customize option automatically creates a custom copy of a predefined report and stores it in the **Shared Folders - Custom** within the business intelligence (BI) catalog. The custom copy includes the report definition, folder structure, and original report permissions, and is linked internally to the original report. You can edit the custom copy of the report, leaving the original report intact. When users open or schedule the original report, they are actually using the custom version.

Benefits of the Customize Option

In addition to conveniently copying a predefined report to the Custom folder, the Customize option:

- Makes it unnecessary to update processes or applications that invoke the report. For example, if the original report is set up to run as a scheduled process, you don't need to change the setup. When users submit the same scheduled process, the custom report runs instead of the original.
- Automatically copies the security settings of the original report.
- Removes the risk of patches overwriting your edits. If a patch updates the original report, the custom report is not updated in any way.

Note: The custom report still references the original data model. The data model is not copied. A patch that updates the data structure of the data model might affect your custom report.

Accessing the Customize Option

To access the Customize option:

1. Sign in to the BI server (for example, `http://hostname.com:7001/xmlpserver`).
2. In the Folders pane, select the predefined report.
3. Select **Customize** from the **More** menu for the report.
4. The copied report in the Custom folder opens, so proceed to edit this report.

To edit the custom report again later, you don't need to be in the BI server. Just go to the BI catalog and either:

- Select the **Customize** or **Edit** option for the original report.
- Find your custom report in the Custom folder and select **Edit**.

Related Topics

- Saving Analytics and Reports: Points to Consider
- What Happens to Customized Analytics and Reports When an Update Is Applied?

Links Between Original and Custom Reports: Points to Consider

The Customize option for predefined reports creates a custom copy of the report that is linked to the original. Consider the following points when you work with both the original and custom versions.

Maintaining the Link Between Reports

The link between the predefined and custom report is based on the name of the custom report and its location within the Custom folder in the business intelligence (BI) catalog.

- If you manually create a report with the same name as a predefined report, and give it the same folder path under the Custom folder, then the new report becomes a custom version of the original. It would be as if you had used the Customize option to create the custom report.
- You can edit the custom report so that it uses a different data model. But if the original data model is updated later, then your custom report doesn't benefit from the change.

Important: The link to the original report breaks if you rename the custom or original report.

Tasks Performed on Original Reports

This table describes what happens when you use the original report and a corresponding custom report exists.

Task Performed on the Original Report	Result When There's a Custom Report
Open	Opens the custom report.
Schedule	Creates a report submission for the custom report.
Edit	Edits the custom report.
Delete	Deletes the original report only. If you delete the custom report, the original report is not deleted.
Copy	Copies the original report.
Cut and Paste	Cuts and pastes the original report.
Rename	Renames the original report. The custom report name is not changed. **Caution:** This breaks the link between the original and custom reports.
Download	Downloads the custom report.
Customize	Edits the custom report.

Task Performed on the Original Report	Result When There's a Custom Report
History	Opens the job history of the custom report.

Related Topics

- Saving Analytics and Reports: Points to Consider
- What Happens to Customized Analytics and Reports When an Update Is Applied?

Layouts

Creating and Editing Report Layouts: Overview

The layout determines what and how data is displayed on report output. Each report has at least one layout template. This topic describes the following aspects of report templates:

- Layout templates
- Layout template types
- Overall process of managing layouts
- Deleting layout templates

Layout Templates

To customize a layout, you edit the layout template, which:

- Defines the presentation components, such as tables and labeled fields.
- Maps columns from the data model to these components so that the data is displayed in the right place.
- Defines font sizes, styles, borders, shading, and other formatting, including images such as a company logo.

Layout Template Types

There are a few types of template files to support different report layout requirements.

- **RTF:** Rich text format (RTF) templates created using Microsoft Word.
- **XPT:** Created using the application's layout editor, these templates are for interactive and more visually appealing layouts.
- eText: These templates are specifically for Electronic Data Interchange (EDI) and electronic funds transfer (EFT) information.

You can also create and edit other types of templates using Adobe PDF, Microsoft Excel, Adobe Flash, and XSL-FO.

Overall Process to Create or Edit Layouts

Editing or creating report layout, for example using Microsoft Word or the layout editor, involves making the actual changes to the template file. But that task is just one part of the entire process for customizing layouts.

1. Copy the original report and save the custom version in **Shared Folders - Custom** in the business intelligence (BI) catalog. You create or edit templates for the custom copy of the report.

   Tip: You can use the Customize option if the original is a predefined report.

2. Review report settings for online viewing.
3. Generate sample data for the report.
4. Edit or create the layout template file.
5. Upload the template file to the report definition. Skip this step if you're using the layout editor.
6. Configure the layout settings.

Deleting Layout Templates

To remove a layout template for a report:

1. Select your report in the BI catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. Select the layout template and click **Delete**.

Related Topics

- Creating and Editing Report Layout Templates Using the Layout Editor: Procedure
- Uploading the Layout Template File to the Report Definition: Procedure
- Configuring Layout Settings for Reports: Procedure

Making Reports Available for Online Viewing: Procedure

Some reports are set up so that you can only view them through another application or submit them as scheduled processes. To view your report online while you're editing it, you must define a few settings. When you're done editing your report, make sure that you reset these settings as needed.

Updating Report Properties

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **Properties** at the top of the page.
3. In the Report Properties dialog box, select **Run Report Online** and deselect **Report is Controlled by External Application**.

Updating Layout Settings

1. Back in the report editor, click **View a list**.
2. Make sure that the **View Online** check box is selected.

Generating Sample Report Data: Procedure

Depending on the type of report layout changes you're making, sample data can be required or optional. You generate sample data, and then load it for use with your layout so that you can map data fields to layout components. For example, for the Start Date table column in your layout, you can set it so that the data displayed in that column comes from the Start Date field in the sample data.

You can generate sample data from the:

- Report data model
- Report viewer
- Scheduler

Generating Sample Data from the Data Model

Follow these steps:

1. Select your data model in the business intelligence (BI) catalog and click **Edit**.

    Tip: If you're not sure which data model is the source for your report, find the report in the catalog and click **Edit**. The data model is displayed in the upper left corner of the report editor.

2. In the data model editor, click **View Data**.
3. Enter values for any required parameters, select the number of rows to return, and click **View**.
4. To save the sample data to the data model, click **Save As Sample Data**.

    If you're designing an RTF template, click **Export** to save the file locally.

5. Save the data model.

Saving Sample Data from the Report Viewer

For reports that are enabled for online viewing, you can save sample data from the report viewer:

1. Select the report in the BI catalog.
2. Click **Open** to run the report in the report viewer with the default parameters.
3. On the Actions menu, click **Export**, then click **Data**.
4. Save the data file.

Saving Sample Data from the Scheduler

For reports that are enabled for scheduling (not necessarily as a scheduled process), you can save sample data from the scheduler:

1. Select the report in the BI catalog.
2. Click **Schedule**.
3. On the General tab, enter values for any report parameters.
4. On the Output tab, ensure that **Save Data for Republishing** is selected.
5. Click **Submit**.
6. Open the Report Job History page.
7. On the global header, click **Open**, then click **Report Job History**.
8. Select your report job name in the Job Histories table.
9. On the details page, under Output and Delivery, click the **XML Data Download** icon button.

New Reports

Creating Custom Reports: Procedure

Create a custom report when the predefined reports don't provide the data you need. Or, if you want to use a predefined data model, and also want to change other aspects of the report other than layout. Save your custom report to **Shared Folders - Custom** in the business intelligence catalog.

Creating a Report

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click **Create** and select **Report**.
3. Select the data model to use as the data source for your report.
4. Continue with the wizard to create the report layout, or choose to use the layout editor and close the wizard.
5. Define the layout for the report.
6. Click the **Properties** button in the report editor to set specific formatting, caching, and processing options for your report.

Setting Up Access

You or your administrator can:

- Create a job definition so that users can run your custom report as a scheduled process.
- Set up the report for scheduling in the Reports and Analytics pane.
- Secure general access to your report and its job definition, if any.

Related Topics

- Setting Reports Up to Run as Scheduled Processes: Points to Consider
- Setting Reports Up for Scheduling in the Reports and Analytics Pane: Procedure
- Creating and Editing Report Layout Templates Using the Layout Editor: Procedure
- Customizing Data Models: Procedure

Changing the Branding Logo in a Predefined Oracle Fusion Project Performance Reporting RTF Report Template: Worked Example

The Update Project Performance Data report layout includes a standard Oracle logo in the report header. You want to replace the Oracle logo with your own logo.

The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
What version of Microsoft Word are you using?	Microsoft Word 2007

Decisions to Consider	In This Example
What image do you want to use as your logo?	O_ FusionApps_ ProjectPortfolioMgmt_ clr.gif
Which data model do you need to download sample report data from?	SummarizationDM
Do you want to preview the changed template?	Yes

Prerequisite

1. Install the Template Builder for Word add-in, and download sample data (save it locally).

Changing the Logo

To change the logo in the report output:

1. Select the Update Project Performance Data Execution Report in the BI catalog and click **Edit**.
2. In the report editor, click the **Edit** link of the Update Project Performance Data Execution Report layout to download the RTF file.
3. Open the RTF file in Microsoft Word.
4. In the **BI Publisher** tab, click **Sample XML** in the **Load Data** group, and select sample data that was saved from the data model.
5. In the template, delete the Oracle logo and the text Fusion Projects and Project Performance Reporting.
6. On the **Insert** tab in the **Illustrations** group, click **Picture**.
7. Select the O_FusionApps_ProjectPortfolioMgmt_clr.gif file and insert it into the Word document.
8. Resize the image if you need to.
9. If the template file includes section breaks, you must insert the new logo for each section header.
10. In the **Oracle BI Publisher** tab, in the **Preview** group, click **PDF**. You can preview the PDF output that's generated with the sample data that you loaded.

Reports

Process Output Reports: Overview

This topic lists the business intelligence publisher reports available in Oracle Project Portfolio Management. You can use these reports to review your processed data in a predefined format and print them.

The following table lists the available process output reports.

Report Name	Report Description	Process Name	Intended User
Absence Management Transfer Processing Report	Report for the process that loads new, updated, or withdrawn absence records from Oracle Absence Management to Project Execution Management.	Initiate Absence Records Transfer to Oracle Fusion Project Execution	Resource Manager

Report Name	Report Description	Process Name	Intended User
Accounting and Project Accounting Periods Close Exceptions Report	Report for the processes that close accounting or project accounting periods. Also displays unprocessed transactions and conditions that prevent the closing of accounting or project accounting periods.	Close Accounting Period Close Project Accounting Period Accounting Period Close Exceptions Report Project Accounting Period Close Exceptions Report	Project Accountant Grants Accountant
Adjust All Expenditure Items Execution Report	Report for the process that provides a summary of the adjusted expenditure items and adjustment exceptions.	Adjust All Expenditure Items	Project Accountant Grants Accountant
Billing Event Upload Error Report	Report for the process that creates contract billing events in Oracle Project Billing based on the data loaded into the open interface table.	Import Project Billing Events	Project Billing Specialist
Build New Organization Burden Multipliers Execution Report	Report for the process that adds burden multipliers for a new organization to burden schedules after the organization is added to the organization hierarchy.	Build New Organization Burden Multipliers	Project Accountant Grants Accountant
Change Project and Task Organizations Execution Report	Report for the process that reassigns all projects in one organization to a different organization, or changes the organization on a single project and optionally cascades the changes to the project tasks. Used particularly when the enterprise is undergoing reorganization.	Change Project and Task Organizations	Business Unit Administrator
Create Periodic Capital Events Execution Report	Report for the process that groups unprocessed assets and costs for capital projects based on the in-service date, expenditure item date, and project, and then associates the groups of unprocessed assets and costs with the event period.	Create Periodic Capital Events	Project Accountant Grants Accountant
Delete Allocation Transactions Execution Report	Report for the process that deletes all transactions for a draft allocation.	Delete Allocation Transactions	Project Accountant Grants Accountant
Delete Capitalized Interest Transactions Execution Report	Report for the process that deletes the selected capitalized interest batch that is in draft success status.	Delete Capitalized Interest Transactions	Project Accountant Grants Accountant

Report Name	Report Description	Process Name	Intended User
Delete Cost Transactions Report	Report for the process that deletes rejected or all unprocessed project cost transactions in an expenditure batch.	Delete Cost Transactions	Project Accountant Project Manager
Delete Unreleased Invoices Execution Report	Report for the process that deletes draft, approved, and rejected project contract invoices.	Delete Draft, Approved, and Approval Rejected Invoices	Project Billing Specialist Grants Accountant
Denormalize Organization Hierarchies Execution Report	Report for the process that converts all hierarchical lists of organizations specified in the business unit implementation options into flat lists to enhance performance throughout the Project Financial Management application.	Denormalize Organization Hierarchies	Project Application Administrator
Generate Borrowed and Lent Amounts Execution Report	Report for the process that creates borrowed and lent distributions for cross-charge transactions within a legal entity.	Generate Borrowed and Lent Amounts: Generate Output Report	Project Accountant Grants Accountant
Export Invoice Data Report	Report for the process that exports released project contract invoice details to third-party receivables applications.	Export Invoice Details	Project Billing Specialist
Export Revenue Data Report	Report for the process that exports project contract revenue distributions to third-party general ledger applications.	Export Revenue Details	Project Billing Specialist
Federal Financial Report	Federal report that tracks the summary transactions for an award, the amount spent or received, and the outstanding obligation amount.	Generate Federal Financial Report	Grants Administrator
Fusion Projects Coexistence Cross-Charge Data Report	Report for the process that extracts cross-charge distributions for accounting in third-party applications. The export status of such cross-charge distributions is updated in the application.	Extract Cross-Charge Distributions for External Accounting	Project Accountant
Fusion Projects Coexistence Data Output Report	Report for the process that extracts cost distributions for accounting in third-party applications. The export status of such cost distributions is updated in the application.	Extract Cost Distributions for External Accounting	Project Accountant

Report Name	Report Description	Process Name	Intended User
Generate Allocations Execution Report	Report for the process that generates an allocation for the specified allocation rule.	Generate Allocations	Project Accountant Grants Accountant
Generate Asset Lines Execution Report	Report for the process that creates summarized asset lines for capital assets and retirement adjustment assets based on the asset line grouping method defined for the project.	Generate Asset Lines	Project Accountant Grants Accountant
Generate Burden Costs Execution Report	Report for the process that summarizes burden costs for expenditure items and then creates and processes separate expenditure items for burden costs.	Generate Burden Costs	Project Accountant Grants Accountant
Generate Capitalized Interest Transactions Execution Report	Report for the process that calculates capitalized interest and generates transactions for eligible projects and tasks.	Generate Capitalized Interest Transactions	Project Accountant Grants Accountant
Generate Financial Plan Amounts Execution Report	Report for the process that generates working versions of budgets or forecasts based on existing financial or project plans.	Generate Financial Plan Amounts	Project Manager
Generate Invoices Execution Report	Report for the process that creates invoices for project contract customers according to contractual terms.	Generate Invoices	Project Billing Specialist Grants Accountant
Generate KPI Values Execution Report	Report for the process that generates KPI values and determines overall project health status.	Generate KPI Values	Project Manager
Generate Revenue Execution Report	Report for the process that recognizes project contract revenue according to contractual terms by creating revenue distributions.	Generate Revenue	Project Accountant Grants Accountant
Identify Cross-Charge Transactions Execution Report	Report for the process that identifies cross-charge transactions and classifies them as intercompany or borrowed and lent.	Identify Cross-Charge Transactions: Generate Output Report	Project Accountant Grants Accountant Project Billing Specialist
Import Costs Execution Report	Report for the process that creates expenditure items and cost distributions for the	Import Costs	Project Accountant Grants Accountant

Report Name	Report Description	Process Name	Intended User
	transactions in the open interface table.		
Import Awards Report	Report to track the status of the Import Awards process that imports award data from the open interface table. The award data includes creating of awards, award projects, award funding, and other related details.	Import Awards	Grants Administrator
Import Project Budget Execution Report	Report for the process that imports budget versions from the open interface table. Displays the list of budget versions that are imported successfully and error details for the rejected budget versions.	Budget Import Execution Report	Project Application Administrator Project Integration Specialist
Import Project Enterprise Resources Execution Report	Report for the process that imports project enterprise resources from the open interface table and creates project enterprise resources.	Import Project Enterprise Resources	Project Administrator
Import Project Plan Execution Report	Report for the process that imports projects and tasks from the open interface table and creates projects and tasks.	Import Project Plan	Project Manager Project Administrator Project Integration Specialist
Import Project Report	Report for the process that imports projects from the open interface table. Displays the list of projects that are imported successfully and error details for the rejected projects.	Import Projects	Project Administrator Grants Administrator
Import Project Resource Assignments Execution Report	Report for the process that imports project resource assignment data from the open interface table and creates project resource assignments.	Import Project Resource Assignments	Resource Manager
Import Project Resource Requests Execution Report	Report for the process that imports project resource request data from the open interface table and creates project resource requests.	Import Project Resource Requests	Project Administrator

Report Name	Report Description	Process Name	Intended User
Import Project Tasks Report	Report for the process that imports project tasks from the open interface table. Displays the list of project tasks that are imported successfully and error details for the rejected project tasks.	Import Project Tasks	Project Administrator Grants Administrator
Import Resource Actual Hours Execution Report	Report for the process that imports resource actual hours data from the open interface table and creates time transactions.	Import Resource Actual Hours	Project Administrator
Import Resource Pools and Memberships Execution Report	Report for the process that imports resource pool and pool membership data from the open interface and creates resource pools and memberships.	Import Resource Pools and Memberships	Implementation Administrator Resource Manager
Maintain Project Performance Data Execution Report	Report for the process that improves performance during project performance data summarization by purging unused or deleted dimension members and summaries, reordering data, merging Oracle Essbase incremental slices, and optionally deleting project performance data.	Maintain Project Performance Data	Project Application Administrator
Open Accounting and Project Accounting Periods Execution Report	Report for the processes that update the status of the accounting or project accounting periods to open.	Open Accounting Period Open Project Accounting Period	Project Accountant Grants Accountant
Reclassify Billing Offset Balances Execution Report	Report for the process that creates reclassification accounting transactions to effectively net the unbilled receivables and deferred revenue balances together into a single balance.	Reclassify Billing Offset Balances	Project Accountant Grants Accountant
Recalculate Burden Cost Amounts Execution Report	Report for the process that identifies expenditure items impacted by a burden schedule version change and processes the resulting burden cost recalculation adjustments.	Recalculate Burden Cost Amounts	Project Accountant Grants Accountant
Release Allocation Transactions Execution Report	Report for the process that release and processes allocation and offset transactions for a draft allocation.	Release Allocation Transactions	Project Accountant

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Report Name	Report Description	Process Name	Intended User
Release Capitalized Interest Transactions Execution Report	Report for the process that releases a capitalized interest batch that is in draft success status and creates expenditure items for the interest transactions.	Release Capitalized Interest Transactions	Project Accountant Grants Accountant
Reverse Allocation Transactions Execution Report	Report for the process that creates and processes transactions to reverse a released allocation.	Reverse Allocation Transactions	Project Accountant Grants Accountant
Reverse Capitalized Interest Transactions Execution Report	Report for the process that reverses a capitalized interest batch that is in released status and creates reversal transactions.	Reverse Capitalized Interest Transactions	Project Accountant Grants Accountant
Sweep Transaction Accounting Events Execution Report	Report for the process that sweeps unaccounted transactions into the next open or future-enterable accounting period so that the current period can be closed.	Sweep Transaction Accounting Events	Project Accountant Grants Accountant
Transfer Assets to Oracle Fusion Assets Execution Report	Report for the process that creates one additional line for each capital asset line or retirement cost line in Oracle Project Costing and transfers these lines to Oracle Assets to become fixed assets or group retirement reserve adjustments.	Transfer Assets to Oracle Fusion Assets	Project Accountant Grants Accountant
Transfer Invoice Details to Receivables Execution Report	Report for the process that transfers released project contract invoices to the Oracle Receivables interface tables.	Transfer Invoice Details to Receivables	Project Billing Specialist Grants Accountant
Update Asset Details from Oracle Fusion Assets Execution Report	Report for the process that identifies assets and asset lines. Updates asset number and asset period in which these assets and asset lines are posted.	Update Asset Details from Oracle Fusion Assets	Project Accountant Grants Accountant
Update Financial Project Plan and Progress Execution Report	Report for the process that generates working versions of budgets or forecasts based on existing financial or project plans.	Update Financial Project Plan and Progress	Project Manager Project Administrator
Update Invoice Details from Receivables Execution Report	Report for the process that identifies whether project contract invoices are successfully transferred to the Oracle Receivables application,	Update Invoice Details from Receivables	Project Billing Specialist Grants Accountant

Report Name	Report Description	Process Name	Intended User
	updates the receivables invoice number in the Project Financial Management application, and triggers currency conversion and summarization.		
Update Project Contract Performance Data Execution Report	Report for the process that summarizes contract revenue and billing data for project performance reporting.	Update Project Contract Performance Data	Project Manager
Update Project Performance Data Execution Report	Report for the process that summarizes project cost, budget, forecast, and commitment data for project performance reporting.	Update Project Performance Data	Project Manager Project Administrator
Update Project Plan Data Execution Report	Report for the process that updates the project plan with summarized amounts from actual cost transactions.	Update Project Plan Data	Project Manager
Update Resource Rates for Project Enterprise Resources Execution Report	Report for the process that updates project enterprise resource rates from resource rate schedules.	Update Resource Rates for Project Enterprise Resources	Resource Manager
Update Work Type Execution Report	Report for the process that provides a summary of the number of updated objects with work type details. The updated objects are projects, tasks, expenditure items, and cost distributions.	Update Work Type	Project Administrator

Accounting and Project Accounting Periods Close Exceptions Reports: Explained

This topic provides an overview of the Accounting and Project Accounting Periods Close Exceptions reports.

Overview

You can review the unprocessed transactions and other conditions that prevent accounting or project accounting periods from being closed by using the Accounting and Project Accounting Periods Close Exceptions reports. Multiple reports are grouped under the Accounting and Project Accounting Periods Close Exceptions reports as listed below.

- Close Accounting Period Execution Report
- Close Pending Accounting Period Execution Report
- Close Project Accounting Period Execution Report

- Close Pending Project Accounting Period Execution Report
- Accounting Period Close Exceptions Report
- Project Accounting Period Close Exceptions Report

Key Insights

These reports answer the following business questions:

- What needs to be done before I can close the periods?
- Are there any issues which will prevent me from closing the periods?
- Which unprocessed transactions can prevent the periods from being closed?

Frequently Asked Questions

The following table lists the frequently asked questions about these reports.

FAQ	Answer
How do I find these reports?	• Reports and Analytics - Shared Folders - Projects - Project Cost - Accounting • Cost Work Area - Tasks - Reporting • Revenue Work Area - Tasks - Reports
How do I generate these reports?	Using the following processes: • Close Accounting Period • Close Project Accounting Period • Accounting Period Close Exceptions Report • Project Accounting Period Close Exceptions Report
Who uses these reports?	• Grants Accountant • Project Accountant
When do I use these reports?	When you need to close accounting or project accounting periods.
What can I do with these reports?	You can: • Confirm that the status of the accounting period has been updated to close or close pending. • Confirm that the status of the project accounting period has been updated to close or close pending. • Identify unprocessed cost transactions, unaccounted cost transactions, and transactions which exist in account payables but haven't been imported into project costing that prevent accounting and project accounting periods from being closed.
What type of reports are these?	Oracle Business Intelligence Publisher

Process Parameters for the Reports

The following table lists the parameters you must provide for the various processes that generate these reports.

Report	Process	Process Parameters	Values
Close Accounting Period Execution Report	Close Accounting Period	• *Ledger • *Processing Action • *Period • Report Style	• Ledger name from list of values • Accounting period close • Accounting period for the ledger from list of values • Detail Summary
Close Pending Accounting Period Execution Report	Close Accounting Period	• *Ledger • *Processing Action • *Period • Report Style	• Ledger name from list of values • Accounting period close pending • Accounting period for the ledger from list of values • Detail Summary
Close Project Accounting Period Execution Report	Close Project Accounting Period	• *Ledger • *Processing Action • *Period • Report Style	• Ledger name from list of values • Project accounting period close • Project accounting period for the ledger from list of values • Detail Summary
Close Pending Project Accounting Period Execution Report	Close Project Accounting Period	• *Ledger • *Processing Action • *Period • Report Style	• Ledger name from list of values • Project accounting period close pending • Project accounting period for the ledger from list of values • Detail Summary
Accounting Period Close Exceptions Report	Accounting Period Close Exceptions Report	• *Ledger • *Period • Report Style • Transaction Category	• Ledger name from list of values • Accounting period for the ledger from list of values • Detail Summary • Cross-charge transactions Expenditure transactions Inventory transactions Receipt accrual transactions Revenue transactions

Report	Process	Process Parameters	Values
			Supplier invoice transactions
Project Accounting Period Close Exceptions Report	Project Accounting Period Close Exceptions Report	• *Business Unit • *Period • Report Style • Transaction Category	• Business unit name from list of values • Project accounting period for the business unit from list of values • Detail Summary • Cross-charge transactions Expenditure transactions Inventory transactions Receipt accrual transactions Revenue transactions Supplier invoice transactions

The following processes always trigger the Validate Pending Inventory and Receipt Transactions process:

- Close Accounting Period
- Close Project Accounting Period

The following processes for inventory or receipt accrual transactions always trigger the Validate Pending Inventory and Receipt Transactions process:

- Accounting Period Close Exceptions Report
- Project Accounting Period Close Exceptions Report

The following processes have the processing mode set to Update:

- Close Accounting Period
- Close Project Accounting Period

The following processes have the processing mode set to Review:

- Accounting Period Close Exceptions Report
- Project Accounting Period Close Exceptions Report

Federal Financial Report: Explained

This topic provides an overview of the Federal Financial Report.

Overview

You can utilize the Federal Financial Report to view and print award financial information in a standard layout defined by the federal agency. Using this report you can track the summary transactions for an award, the amount spent or received, and the outstanding obligation amount.

Key Insights

This report answers the following business questions:

- What is the cumulative amount of actual cash received that you need to report to the federal agency?
- What is the cumulative amount of federal fund disbursements that you need to report to the federal agency?
- What is the total funds authorized, total expenditures, and total unliquidated obligation that you need to report to the federal agency?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics - Shared Folders - Projects - Grants Management - Award
How do I generate this report?	Using the Federal Financial Report process
Who uses this report?	Grants Administrator
When do I use this report?	When you need to view and print award financial information in the standard federal format.

What can I do with this report?	You can view the following information and print the report.
	• Federal agency details
	• Recipient details
	• Project or grant period
	• Transactions:
	  ◦ Federal cash amount
	  ◦ Federal expenditures and unobligated balance
	  ◦ Recipient share
	  ◦ Program income

What type of report is this?	Oracle Business Intelligence Publisher

Process Parameters for the Report

The Federal Financial Report process accepts the following parameters:

Parameter	Values
* Generate Report	• Multiple awards • Single award
* Business Unit	List of values, for example, Vision City Operations
* Award Name	List of values for the selected business unit, for example, Oncology Research Award

Parameter	Values
Sponsor	List of values of federal sponsors You must enter a value for this parameter if you choose to generate the report for multiple awards.
Institution	List of values defaulted to selected business unit You must enter a value for this parameter if you choose to generate the report for multiple awards.
* Certifying Official	List of values, for example, Amy Marlin
* Report Date	Default value set to current date
* Period End Date	Date, for example, 11/11/2014
* Report Type	• Annual • Final • Quarterly • Semiannual
Total Recipient Share Required	Amount, for example, 1,000.000
Total Federal Program Income	Amount, for example, 1,000.000
Program Income Expended in Accordance with the Deduction Alternative	Amount, for example, 1,000.000
Program Income Expended in Accordance with the Addition Alternative	Amount, for example, 1,000.000
Comments	Text notes

Preview Invoice Report: Explained

This topic provides an overview of the Preview Invoice report.

Overview

You can review invoice information in a specific format using the Preview Invoice feature in the Invoices work area before printing the invoice or sending it to account receivables. To preview the invoice, you must select the:

- Invoice format template in which you want to preview the invoice. For example, Services Fusion Invoice Report, Services Standard Invoice Report, and so on.

  You can create your own format templates for your invoices.
- Output format in which you want to preview the invoice. For example, HTML, PDF, RTF, and so on.

To generate the Preview Invoice report in PDF format, you must install Adobe Acrobat Reader. You can download it from http://adobe.com.

Key Insights

This report answers the following business questions:

- Which cost transactions and billing events are billed through the invoice?
- Are the transactions billed at the correct rates?
- Are the invoice line descriptions well formatted and do they provide the requested information?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Billing
How do I generate this report?	Invoices Work Area - Invoice Processing Status: • Draft Invoices - Actions - Preview • Submitted Invoices - Actions - Preview • Released Invoices - Actions - Preview Alternatively, click the **Preview** button on Draft Invoices, Submitted Invoices, and Released Invoices tabs in the Invoice Processing Status region of the Invoices work area.
Who uses this report?	• Grants Accountant • Project Billing Specialist
When do I use this report?	When you need to preview the invoice before printing or sending it to account receivables.
What can I do with this report?	You can view the following information: • Contract terms • Due date • Invoice date • Invoice line details • Project summary • Total billed amount
What type of report is this?	Oracle Business Intelligence Publisher

You must select a single invoice to generate the Preview Invoice report. You can't generate the report if you select multiple invoices in the Invoices work area.

Preview SF270 Report: Explained

This topic provides an overview of the Preview SF270 federal report.

Overview

You can use the Preview SF270 report to request only for reimbursements on federal grant awards which aren't sponsored through letters of credit.

Key Insights

This report answers the following business question:

- What is the reimbursement amount to request, as of a certain period, from the federal agency?

Frequently Asked Questions

The following tables lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Reports and Analytics - Shared Folders - Projects - Project Billing
How do I generate this report?	• Using the Generate Invoices process • Manage Invoices - Review SF 270
Who uses this report?	• Grants Accountant • Project Billing Specialist
When do I use this report?	When you need to: • Request for reimbursements on federal grant awards which aren't sponsored through letters of credit • Display current and previously billed transactions, and cost sharing details in a standard federal format
What can I do with this report?	You can view the following information in the report: • Bill From and Bill To • Type of payment requested • Basis of request • Federal sponsoring agency and organization to which the SF270 invoice is submitted • Federal grant or other identification number assigned by the federal agency • Partial payment request number • Employer identification number • Recipient account number • Period covered by the request • Recipient organization name and address • Federal amount of reimbursement • Total program outlay to date • Cumulative Program Income • Estimated net cash outlay for advance period • Federal and non-Federal share of the cost

FAQ	Answer
	• Additional notes
What type of report is this?	Oracle Business Intelligence Publisher

Prerequisites

Before you can generate and review your invoice in the SF270 report format, you must:

- Implement Grants Management application for the business unit to which the invoice contract belongs.
- Select SF270 as the invoice format in the contract bill plan.
- Create your invoice contract as an award contract.
- Select only a single invoice to preview.

Reclassify Billing Offset Balances Execution Report: Explained

This topic provides an overview of the Reclassify Billing Offset Balances Execution Report.

Overview

You can utilize the Reclassify Billing Offset Balances Execution Report to review the reclassification of accounting transactions to effectively net unbilled receivables and deferred revenue balances together into a single balance.

Key Insights

This report answers the following business questions:

- What are the summary results of the reclassify billing offset balances process?
- What errors were encountered attempting to reclassify billing offset balances?
- What billing offset reclassification accounting transactions were successfully created by the process?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics - Shared Folders - Projects - Project Revenue
How do I generate this report?	Using the Reclassify Billing Offset Balances process from: • Revenue Work Area - Tasks - Accounting • Scheduled Processes - Schedule New Process
Who uses this report?	• Grants Accountant • Project Accountant
When do I use this report?	When you need to group the unbilled receivables and deferred revenue balances into a single balance.

FAQ	Answer
What can I do with this report?	You can view the following information and print the report. • Reclassification errors • Reclassification warnings • Successful reclassifications
What type of report is this?	Oracle Business Intelligence Publisher

Process Parameters for the Report

The Reclassify Billing Offset Balances process accepts the following parameters.

Parameter	Values
*Business Unit	List of values, for example, Vision Operations
*Accounting Period	List of values, for example, 2009-AUG
Contract Type	List of values
Revenue Method Classification	• Rate Based • Amount Based • Percent Complete • Percent Spent • As Incurred • As Billed
Contract Number	List of values
Contract Line Number	List of values
*Generate Success Report	• Yes • No

Sweep Transaction Accounting Events Execution Report: Explained

This topic provides an overview of the Sweep Transaction Accounting Events Execution Report.

Overview

You can utilize the Sweep Transaction Accounting Events Execution Report to review unaccounted transactions that are moved into the next open or future-enterable accounting period so that the current period can be closed.

Key Insights

This report answers the following business questions:

- Are there transactions which need to be accounted before I can close the period?
- If I run the Sweep Transaction Accounting Events process, which transactions are moved from the current period into the next open period?
- What's the result of the Sweep Transaction Accounting Events process?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics - Shared Folders - Projects - Project Cost - Accounting
How do I generate this report?	Using the Sweep Transaction Accounting Events process from: • Revenue Work Area - Tasks - Accounting • Scheduled Processes - Schedule New Process
Who uses this report?	• Grants Accountant • Project Accountant
When do I use this report?	When you need to close a period that has unaccounted transactions.
What can I do with this report?	You can review the output of the Sweep Transaction Accounting Events process and print the report.
What type of report is this?	Oracle Business Intelligence Publisher

Process Parameters for the Report

The Sweep Transaction Accounting Events process accepts the following parameters.

Parameter	Values
*Ledger	List of values, for example, Vision City
Business Unit	List of values, for example, Vision Operations
*Accounting Period	List of values, for example, Jan-06
Source Application	• Project Billing • Project Costing
*Process Mode	• Review • Update

7 Analytics and Reports Management

Scheduling Analytics and Reports

Setting Reports Up to Run as Scheduled Processes: Points to Consider

You can create a job definition for predefined or custom reports so that users can run them as scheduled processes. Use the Define Custom Enterprise Scheduler Jobs task in the Setup and Maintenance work area to create job definitions. Otherwise, users can open reports (which are set up to be run online) through the Reports and Analytics pane, or open and schedule them from the business intelligence catalog.

General Job Definition Information

This table describes the general information to enter for your job definition.

Field	What You Enter
Job Type	BIPJobType
Report ID	The path to the report in the catalog, starting with the folder beneath Shared Folders, for example: Custom/ <Family Name>/ <Product Name>/<Report File Name>.xdo. Make sure to include the .xdo extension for the report definition.
Default Output	A default output format.

Parameters

You can define parameters to be available to users when they submit scheduled processes based on your job definition. When users run the scheduled process, the values they enter for the parameters:

- Are passed to the data model that the report is using.
- Determine the data to be included in the report.

The parameters that you define must be in the same order as parameters in the data model. For example, the data model has parameters in this order:

- P_START_DATE
- P_END_DATE
- P_CURRENCY

You create parameters as follows:

- Start Date

- End Date
- Currency

Note: Because you define parameters using the list of values sources from the Define Custom Enterprise Scheduler Jobs task, you should not define lists of values in the data model.

User Property

The only user property you need to define is `EXT_PortletContainerWebModule`. Only lists of values associated with the application that you select are made available for parameters in this job definition.

Related Topics

- Managing Job Definitions: Highlights
- Managing List of Values Sources: Highlights
- Customizing Data Models: Procedure
- Creating Custom Reports: Procedure

Setting Reports Up for Scheduling in the Reports and Analytics Pane: Procedure

You can set up reports as scheduled processes, which means users can submit them from the Scheduled Processes and other work areas. If you want users to also submit these scheduled processes from the Reports and Analytics pane, then you must configure properties for the corresponding reports.

Enabling a Report for Scheduling

To enable scheduling in the Reports and Analytics pane:

1. Select the report in the business intelligence catalog and click **Edit**.
2. Click **Properties**.
3. On the General tab in the Properties dialog box, enter the following fields:

Field	Value
Enterprise Scheduler Job Package Name	The path for the job definition, for example: / oracle/ apps/ ess/<product family>/ <product>/ <business area>/ Jobs
Enterprise Scheduler Job Definition Name	The job definition name (not display name), for example: ABCDEFG

Related Topics

- Setting Up the Reports and Analytics Pane: Procedure
- Accessing Report Components to Customize: Points to Consider

Adding Analyses to Application Pages

Adding an Analysis to the Project Performance Dashboard: Worked Example

This example shows how to add an analysis to the Project Performance Dashboard. This dashboard is a page in the application, not a dashboard in the business intelligence (BI) catalog.

You can add predefined or custom analyses to any desktop page that you can personalize or customize.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which analysis do you want to add to the dashboard?	Project Income Statement **Warning:** Ensure that the analysis doesn't query a large number of records. If it is, then the Project Performance Dashboard page can take a long time to open after you add the analysis.
Do you have to change the layout of the page?	Yes, to a two-column layout that is wider on the right side. **Note:** The one- or two-column layout gives enough space to properly display analyses.
Do you want all or only one view of the analysis?	All views.
Are these changes for you only, or for all users of the Project Performance Dashboard?	You only.

Adding an Analysis

1. Open the Project Performance Dashboard.
2. Click your name in the global area and from the Administration submenu select **Customize Pages...**.
3. You need to be in an active sandbox session to perform customization. Activate a sandbox if not already in a sandbox session. Click **Activate Sandbox**.
   If you are already in an active sandbox session, steps 3 to 7 are not required.
4. On the Manage Sandboxes window, select a sandbox and click **Set as Active**.
5. After you activate the sandbox, the application redirects you to the home page. On the Warning window, click **Yes** to continue.
6. Open the Project Performance Dashboard.
7. Click your name in the global area and from the Administration submenu select **Customize Pages...**.
8. Click **Change Layout** and select the **Two columns, narrow left** option.

9. Click **Add Content** for the wider column.

   The **Reports and Analytics** folder in the Add Content dialog box contains what's in the BI catalog.
10. Click through the folders in the catalog until you see the Project Financials Sample Reports folder. Click the name of the analysis in this folder, and click **Add** to include all views of the analysis.

    If you click **Open** or **Project Income Statement**, you can select a specific view to add.
11. Click **Close** after you see the analysis added to the top of the wider column on the dashboard.
12. Click **Close** to close the composer view and view the dashboard.

Related Topics

- Customizing the Project Performance Dashboard: Worked Example

8 Maintenance and Migration

Performance Tuning for Analytics and Reports: Points to Consider

When you create analytics and reports, don't use blind queries and include sufficient filters when creating analytics or reports with hierarchies.

Blind Queries

Avoid blind queries because they are performed without filters and therefore fetch large data sets. Performance could be an issue with these queries and can easily overload the application. All Transactional Business Intelligence queries on large transaction tables must be time bound. For example, include a time dimension filter and additional filters to restrict by key dimensions such as worker. In addition, apply filters to columns that have database indexes in the transaction tables. This ensures a good execution plan is generated for the Business Intelligence query.

Hierarchies and Trees in Transactional Business Intelligence

Queries on trees and hierarchical dimensions such as manager can have an impact on performance. Transactional Business Intelligence uses a column-flattening approach to quickly fetch data for a specific node in the hierarchy. Still, because there is no pre-aggregation for the different levels of the hierarchy, carefully craft any query involving hierarchies to ensure that sufficient filters are applied to keep the result set small.

Reviewing SQL Statements Used in Analyses: Procedure

You can review the SQL statement using either of the following procedures.

Using Analysis in Edit Mode

1. Open the analysis in Edit mode and click the Advanced tab.
2. In the SQL Issued section, review the logical SQL statement.

Using Administration Page

1. On the Administration page, in the Session Management section, click the Manage Sessions link.

   Note: You must be a Business Intelligence Administrator to access the Administration and Manage Sessions page.

2. On the Manage Sessions page, in the Action column, click the View Log link to review the SQL statement.

Moving Analyses and Reports: Procedure

You can archive to bundle the entire catalog, specific folders, or multi component objects as a .catalog file and upload the .catalog file to unarchive the data to another location in the catalog. Use the archive process to transfer specific data across environments, for example from a development environment to a production environment.

Creating an Archive

To create an archive file:

1. Locate the object in the catalog.
2. Select **More** and then select **Archive**.
3. In the Archive dialog box, select one or more of the following options:
    - Keep Permissions: Maintain the object or folder's existing permissions. If you do not select this option, then the archiving process does not include any permissions. Upon unarchiving, the parent folder's permissions are assigned to all of the objects and folders.
    - Keep Time stamps: Maintain the Creation Time, Last Modified, and Last Accessed times assigned to the object or folder. Upon unarchiving, the LastModified time is updated to indicate the time at which the object or folder is unarchived. If you select this option, the Old option in the Paste Overview area of the Preferences dialog box is available when unarchiving. You use the Old option to overwrite existing catalog items that are older than the catalog items in the archive.

      If you do not select this option, then the archiving process does not include time information and the Old option in the Paste Overview area of the Preferences dialog box is not available.
4. Click **OK** to download the archive file.

Moving a File to a New Location

To unarchive a file:

1. Select the folder in the catalog where you want to upload the archived file.
2. In the **Tasks** pane click **Unarchive**.
3. In the Unarchive dialog box, browse for and select the archive file.
4. Use the Replace option to specify whether to replace an existing folder or object with the same name.
    - All: Select this option to replace any existing folders or objects with the same names as folders or objects included in the archive file that you are uploading.
    - Old: Select this option to replace folders or objects except those folders or objects that exist, unless they are older than the source.
    - None: Select this option to add any new folders or objects, but preserve any existing folders or objects.
    - Force: Select this option to add and replace all folders or objects.
5. Use the ACL option to specify how the folders or objects are assigned permissions using Access Control Lists (ACLs) when unarchived.
    - Inherit: Inherits the folder or object's permissions (ACL) from its new parent folder.
    - Preserve: Preserves the folder or object's permissions (ACL) as it was in the original, mapping accounts as necessary.

- Create: Preserves the folder or object's permissions (ACL) as it was in the original, creating and mapping accounts as necessary.

6. Click **OK**.

9 Smart View

Setting Up Oracle Smart View for Office: Procedure

You can perform data analysis in real time using Oracle Smart View for Office in Project Financial Management applications.

Prerequisite

You must install and configure Oracle Essbase to accept Smart View connections before you can use Oracle Smart View for Office to analyze your project performance.

Steps to Enable

You can get the Smart View shared connection URL and the login credentials from your system administrator.

1. Download and install **Oracle Smart View for Office** from http://www.oracle.com/technetwork/middleware/epm/downloads/smart-view-1112x-1594693.html.
2. Open Microsoft Excel and verify that you can view the **Smart View** tab in the ribbon.
3. Click **Options** in the **Smart View** tab.
4. Enter the Smart View shared connection URL in the **Shared Connections URL** field in the **General** section. For example, http://host:port/workspace/SmartViewProviders.
5. Click **OK**.
6. Click **Panel** in the **Smart View** tab to open the Smart View panel.
7. Click **Shared Connections** in the Smart View panel.
8. Sign in with the user name and password provided by your administrator.
9. Click the **Select Server to proceed** drop down on the Smart View panel.
10. Select **Oracle Essbase** from the **Shared Connections** list.
11. Click **Expand** to expand the **Essbase_FA_Cluster** node.
12. Expand the **Projects** application.
13. Click **ProjPerf** to display the connection options at the bottom of the panel.
14. Click **Connect** to display the list of reporting options.
15. Click **Ad hoc analysis** to populate the default dimensions in Smart View.

Related Topics

- Configure Smart View Client for Users

Analyzing Project Performance Using Oracle Smart View for Office: Procedure

You can perform the following steps to create a report using Oracle Smart View for Office.

1. Click **Ad hoc analysis** at the bottom of the Smart View panel.

2. A new spreadsheet opens with the available dimensions displayed just below the ribbon. 6 dimensions are available to generate a report:

    - Resource
    - Time
    - Time View
    - Accounts
    - Scenario
    - Currency Type
    - Task
3. Drag the dimensions you want into the spreadsheet. If you want to remove a dimension, move it out of the spreadsheet.
4. You can view the available measures by zooming into a dimension. Select the dimension and select **Zoom In** from the ribbon. You can also zoom in by clicking on the dimension.
5. If you don't want to include all the measures in your report, you can select the measures you want to retain and then click **Keep Only** in the ribbon. You can click **Zoom Out** to return to the original dimension.
6. For example, you can retain revenue, burden cost, margin, margin percentage, and labor effort account measures.
7. You can expand the time view and scenario dimensions and retain the values that are relevant to your report. For example, you can retain the inception-to-date and estimate-at-completion values from the time dimension and the actual amount and current budget from the scenario dimension.
8. You can set the remaining dimension filters from the list of values below the ribbon. For example, you can set the:

    - Currency dimension to **Project currency**.
    - Task dimension to **PJS CPBF Flow**. Select the project name in the task dimension if you want to view summarized values at the project level.
    - Resource dimension to **Professional Services PRBS**.
    - Time dimension to **Apr-15** within the accounting calendar **AccountingMon1**.
9. Refresh the data in the report by clicking the **Refresh** button.
10. After the data is retrieved, you can format the report and perform further analysis by using native Microsoft Excel functionality.

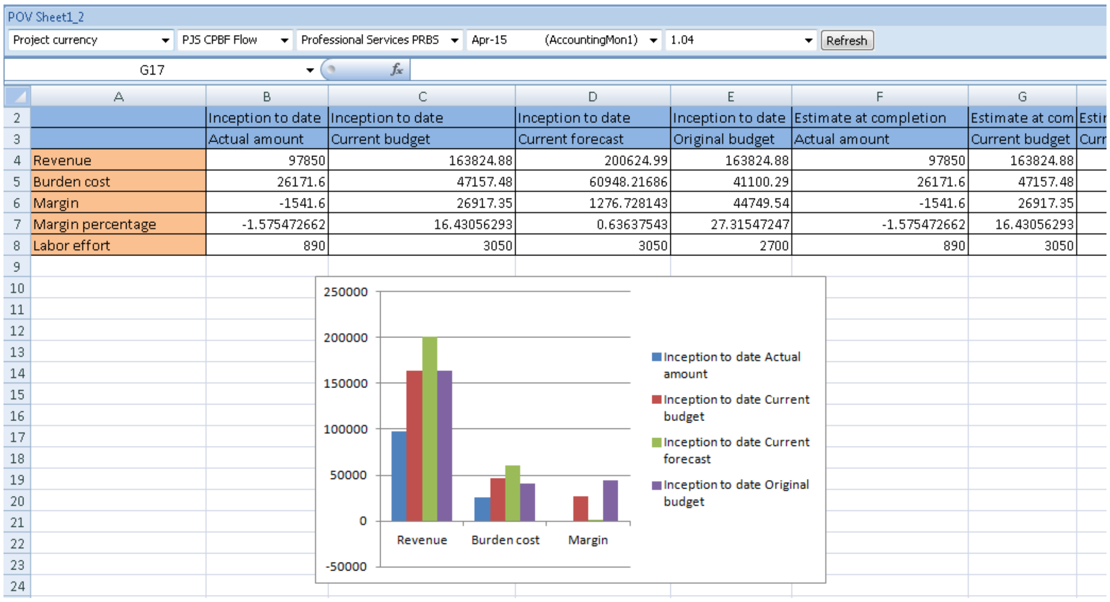
You can share this report with your team or senior management through e-mail, or upload it to a common repository. Users with appropriate data security can open the file and refresh the report to view real-time data.

Using Oracle Smart View for Office to Analyze Project Performance: Explained

This topic provides an overview of the Oracle Smart View for Office tool to view reports. Smart View is a common Microsoft Office interface for Oracle Hyperion Essbase and provides robust and flexible reporting capabilities.

Overview

Project Financial Management applications provide the ability to analyze project performance using Oracle Smart View for Microsoft Office.



	A	B	C	D	E	F	G	
2		Inception to date	Inception to date	Inception to date	Inception to date	Estimate at completion	Estimate at com	Esti
3		Actual amount	Current budget	Current forecast	Original budget	Actual amount	Current budget	Curr
4	Revenue	97850	163824.88	200624.99	163824.88	97850	163824.88	
5	Burden cost	26171.6	47157.48	60948.21686	41100.29	26171.6	47157.48	
6	Margin	-1541.6	26917.35	1276.728143	44749.54	-1541.6	26917.35	
7	Margin percentage	-1.575472662	16.43056293	0.63637543	27.31547247	-1.575472662	16.43056293	
8	Labor effort	890	3050	3050	2700	890	3050	

Key Insights

Using Smart View, you can:

- Create customized reports to review your project performance.
- View data in a table or graph.
- Use the following dimensions to analyze your project metrics.
    - Scenario, for example, ITD, PTD, and so on.
    - Time, for example, a week, month, and so on.
    - Resource, for example, a specific resource or all resources.
    - Task, for example, a specific project task or all tasks.
    - Currency, for example, project currency, ledger currency, and so on.
    - Account, for example, revenue, margin, effort, and so on.

Frequently Asked Questions

The following table lists frequently asked questions about this tool.

FAQ	Answer
How do I find this tool?	Microsoft Excel - Smart View
Who uses this tool?	• Project Accountant • Project Manager Smart View data is secured by project and expenditure business unit.
When do I use this tool?	When you need to: • Analyze project, task, and resource assignment data by period for planned and actual costs. • View, import, manipulate, distribute and share data in Microsoft Excel, Word and PowerPoint interfaces. • Access and integrate Oracle's Enterprise Performance Management and Business Intelligence content from Microsoft Office products. • Have additional flexibility to perform ad hoc or free-form analysis to investigate and understand complex data. • Drill down into lower levels of detail as needed.
What can I do with this tool?	You can: • Create custom reports, save them as templates, and share them with stakeholders. • Leverage Microsoft Excel capabilities to perform real-time data analysis. • Analyze project performance, for example, report on planned and actual costs by project, task, resource, and period.
What type of tool is this?	Oracle Hyperion Smart View

Related Topics

- Smart View: Explained

Glossary

analysis

A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

analytics

Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

business intelligence

Computer technology that transforms information relating to the history or current status of a business organization into more friendly forms used in strategic planning.

business intelligence catalog

The repository where all business intelligence objects, including analytics, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and custom objects.

business intelligence repository

The metadata that determines all of the columns, or pieces of data, that you can include in analytics. You can also use the repository as a source of data for reports.

dashboard

A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

data model

The metadata that determines where data for a report comes from and how that data is retrieved.

EDI

Abbreviation for electronic data interchange.

EFT

Acronym for Electronic Funds Transfer. A direct transfer of money from one account to another, such as an electronic payment of an amount owed a supplier by transferring money from a payer's disbursement bank account into the supplier's bank account.

EPS

Abbreviation for enterprise project structure. A hierarchical representation of projects based on a user-defined classification for accumulation and roll up of project data for reporting purposes. For example, project executives want to see the demand for resources in all construction projects in an organization.

flexfield

A flexible data field that you can customize to contain one or more segments or store additional information. Each segment has a value and a meaning.

flexfield segment

An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

job definition

The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

panel tab

A tab on the right side of the page that slides out when you open it. Each panel tab has an icon as the tab label.

prompt

A parameter that you set when you use analytics, limiting the data in the analysis or in all analyses on the dashboard or dashboard page (tab).

qualification

Items in structured content types such as competencies, degrees, and language skills that have specific values and proficiency ratings.

regional area

The collapsible region in the work area that lets you control what's in the local area, for example by selecting a task or running a search.

report

An output of select data in a predefined format that's optimized for printing.

scheduled process

A program that you run to process data and, in some cases, generate output as a report.

subject area

A set of columns, or pieces of data, related to a specific business object or area.

view

A specific way to present the results of an analysis, for example as a table or graph. Other types of views, such as the title view, show other components of the analysis.

work area

A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.