

Mastek

Cloud Enhancement &
Managed Services

Quarterly
Release Updates

Mastek™
Trust. Value. Velocity

24C - PPM (PROJECT PORTFOLIO MANAGEMENT)

Empowering you for the next update



ORACLE | Partner





DISCLAIMER

These advisory webinars are organized to equip you with the latest updates. The content of this session is based on the interpretation of the material and documentation that Oracle has released and is a general guideline/recommendation only.

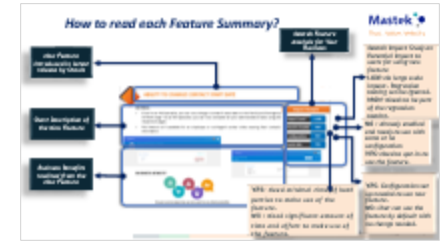
AGENDA



Our Approach to Oracle Update

- Our Analysis of Latest Release
- New Features
 - Known Issues (If any)

Thank You



How to read each Feature Summary?

Mastek Feature Analysis for Your Business

New Feature Introduced in latest release by Oracle

Short Description of the New Feature

Business Benefits realized from the New Feature

ABILITY TO CHANGE CONTACT START DATE

DETAILS:

- If you're an HR Specialist, you can now change a contact's start date on the Family and Emergency Contacts page. As an HR Specialist, you can now complete all your administrative tasks using the responsive pages.
- This feature isn't available for an employee or contingent worker while viewing their contacts' information.

BUSINESS BENEFIT:

Ensure correct data that can be used for any family benefits

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

Mastek Impact Study on Potential Impact to users for using new feature

LOW: No large scale impact. Regression testing can be ignored.

HIGH: Needs to be part of the regression testing.

NO : Already enabled and ready to use with some or no configuration

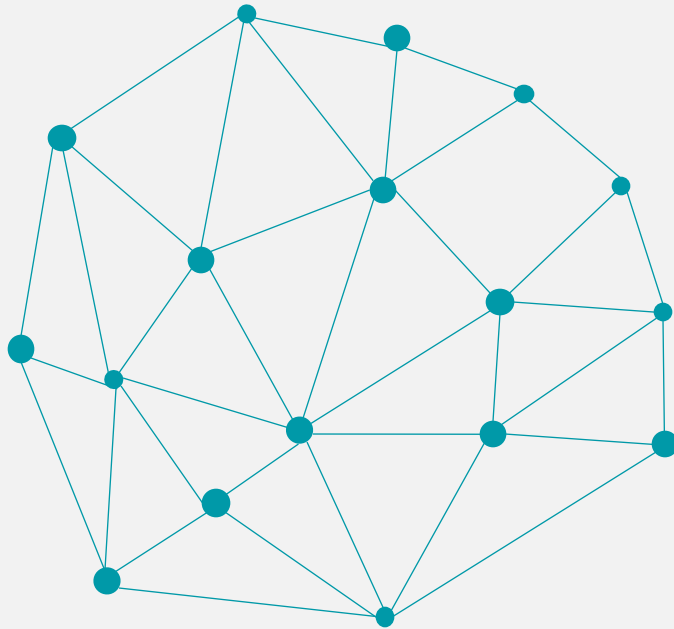
YES: Need to opt-in to use the feature.

YES: Need minimal time of both parties to make use of the feature.

NO : Need significant amount of time and effort to make use of the feature.

YES: Configuration set up needed to use new feature.

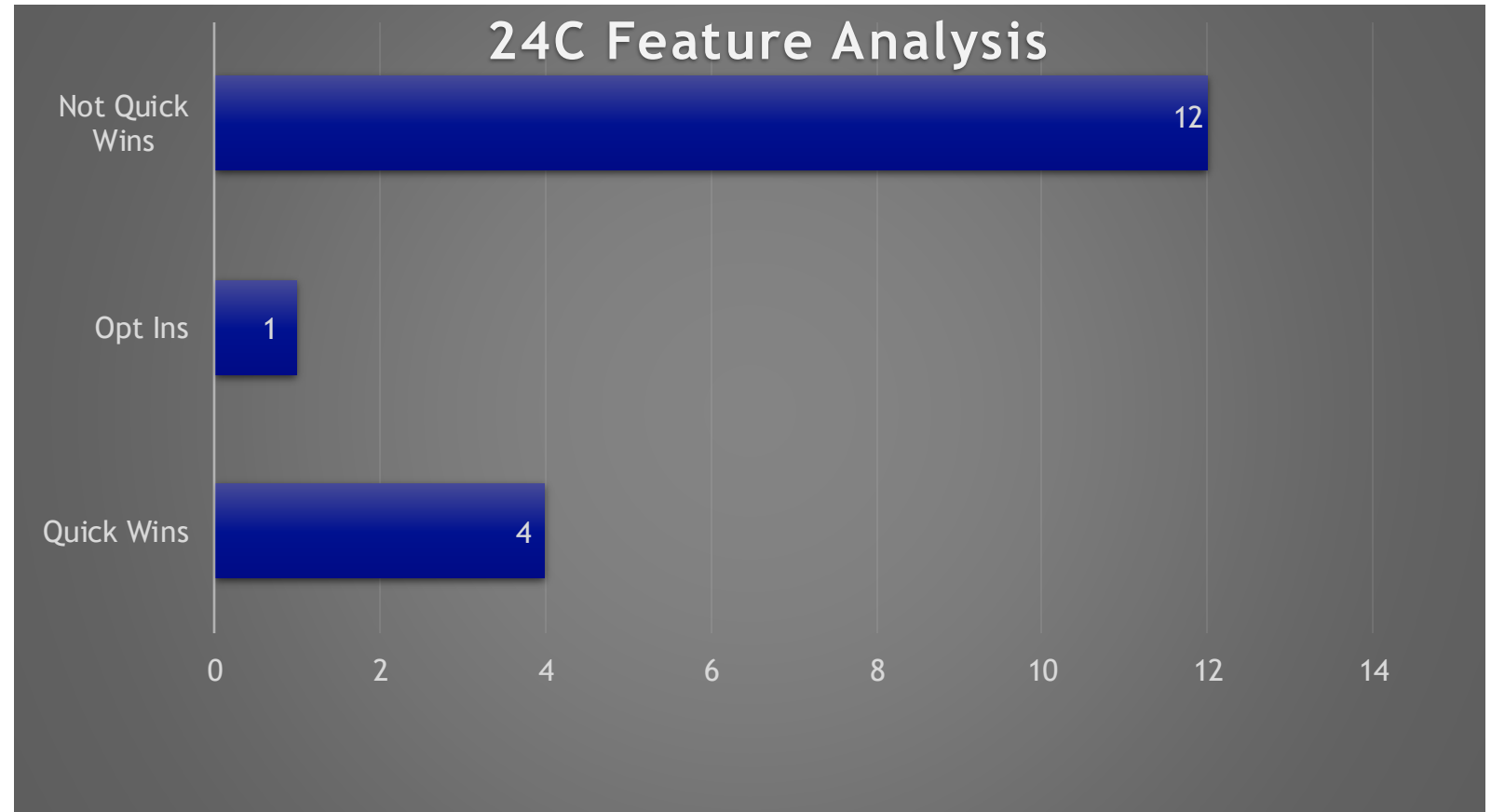
NO: User can use the feature by default with no change needed.

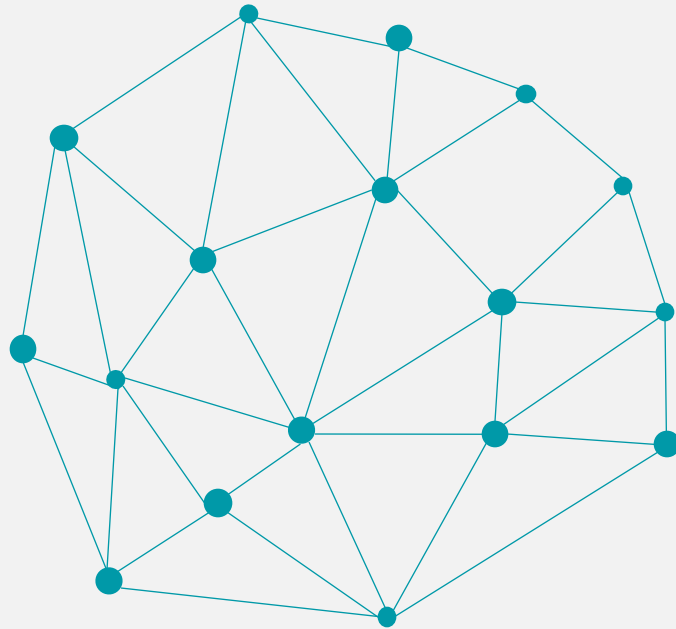


OUR ANALYSIS OF LATEST RELEASE

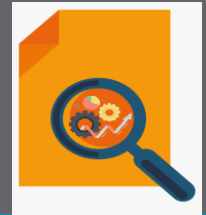
NEW FEATURES

Mastek Analysis- Statistics





NEW FEATURES



QUICK WINS

PROJECT ASSET MANAGEMENT : MASS SPLIT OF PROJECT ASSET LINE

Details :

Use the Import Unassigned Asset Lines file-based data import workbook to split project asset lines either by amount or percentage. Simultaneously assign these newly created project asset lines to eligible project assets.

You can now split large numbers of assigned and unassigned project asset lines into multiple asset lines.

*Asset Line Number	**Asset Name	**Asset ID	Transfer Status Code	FA Period Name	Split Amount	Split Percentage (%)
29185	Building				1000.00	
29185	Dining Room				1000.00	
29185	Parking Lot				1000.00	
29185	Kitchen				1000.00	
29185	Restrooms				1000.00	
29185	Front Store Store Area				1000.00	
29185	Drive Through				500.00	
29185	Building				500.00	
29185	Building				500.00	
29185	Building				-500.00	
29186	Building					10
29186	Dining Room					10
29186	Parking Lot					10
29186	Kitchen					20
29186	Restrooms					20
29186	Front Store Store Area					20
29186	Drive Through					20
29186	Drive Through					10
29186	Drive Through					-10
29186	Drive Through					-10

Impact Analysis

Impact Level	HIGH
Need to Enable	NO
Configuration	NO
Quick Win	YES

Business Benefits :

- Increased efficiency by eliminating the need to make numerous project asset line splits and allocations individually in the Project Assets work area.
- Increased productivity by allowing project asset lines to be split and allocated to multiple project assets by amount or percentage concurrently.
- Reduced operational errors by automating the rounding of amounts to the currency precision.

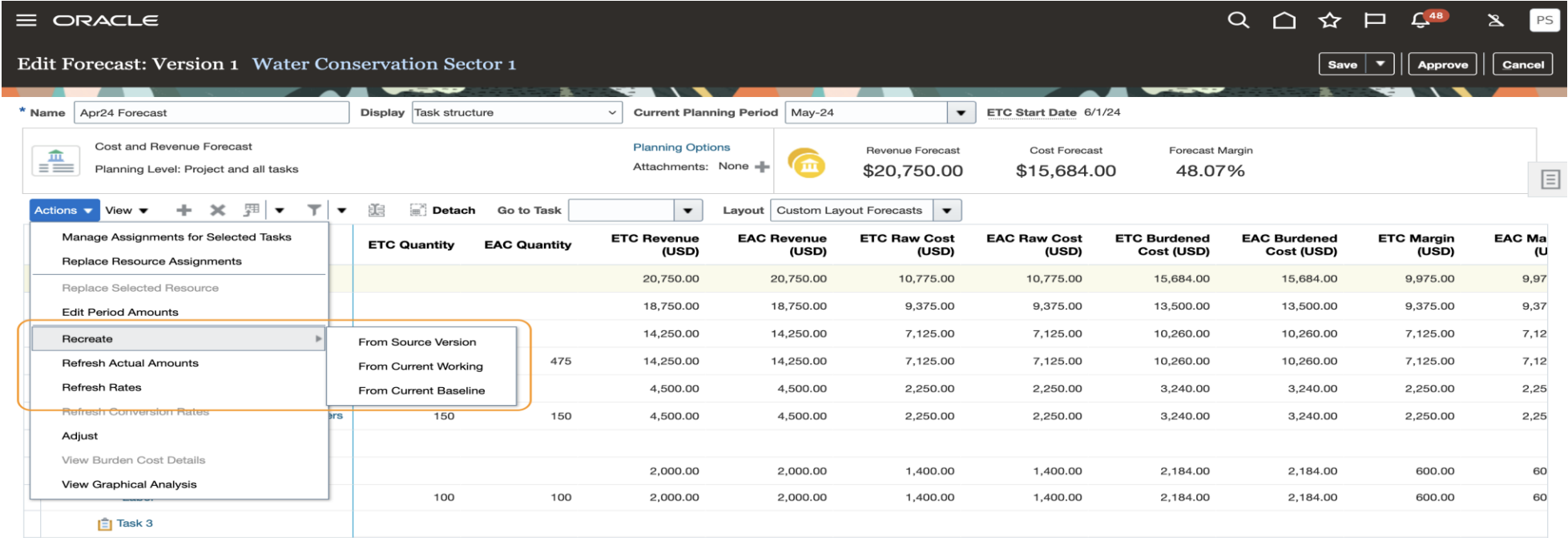
PROJECT PLANNING, SCHEDULING AND FORECASTING : BUDGET OR FORECAST REFRESH FROM SOURCE VERSION

Details :

Refresh budgets or forecasts from the source version to reflect changes made in the source version instead of generating a new version. For example, if a forecast is based on the financial project plan and the financial plan has new resources being planned due to additional scope changes, refresh the current working or working forecast to include the planning for the modified scope and reduce the number of forecast versions being generated. Other examples of changes include updates to dates or the periodic spread in the source.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES



The screenshot shows the Oracle project planning interface for 'Edit Forecast: Version 1 Water Conservation Sector 1'. The 'Actions' menu is open, highlighting the 'Recreate' option, which has a sub-menu with three options: 'From Source Version', 'From Current Working', and 'From Current Baseline'. The table below shows forecast data for various tasks.

ETC Quantity	EAC Quantity	ETC Revenue (USD)	EAC Revenue (USD)	ETC Raw Cost (USD)	EAC Raw Cost (USD)	ETC Burdened Cost (USD)	EAC Burdened Cost (USD)	ETC Margin (USD)	EAC Margin (USD)
		20,750.00	20,750.00	10,775.00	10,775.00	15,684.00	15,684.00	9,975.00	9,975.00
		18,750.00	18,750.00	9,375.00	9,375.00	13,500.00	13,500.00	9,375.00	9,375.00
		14,250.00	14,250.00	7,125.00	7,125.00	10,260.00	10,260.00	7,125.00	7,125.00
475		14,250.00	14,250.00	7,125.00	7,125.00	10,260.00	10,260.00	7,125.00	7,125.00
		4,500.00	4,500.00	2,250.00	2,250.00	3,240.00	3,240.00	2,250.00	2,250.00
150	150	4,500.00	4,500.00	2,250.00	2,250.00	3,240.00	3,240.00	2,250.00	2,250.00
		2,000.00	2,000.00	1,400.00	1,400.00	2,184.00	2,184.00	600.00	600.00
100	100	2,000.00	2,000.00	1,400.00	1,400.00	2,184.00	2,184.00	600.00	600.00

PROJECT PLANNING, SCHEDULING AND FORECASTING : BUDGET OR FORECAST REFRESH FROM SOURCE VERSION

Business Benefits :

- Increased efficiency by effortlessly maintaining project budgets or forecasts to be up-to-date by simply recreating the version from the source when a scope change must be incorporated from the source.
- Increased productivity by saving time or effort on manual process to create a new project budgets or forecasts, also a reduction in data.

PROJECT PLANNING, SCHEDULING AND FORECASTING : PROJECT FILE-BASED DATA IMPORT ENHANCEMENTS

Details :

In this update, improvements for Project File-Based Data Import, or FBDI, include:

- **Option to Cascade Project Date Changes to Project Plan Using FBDI:** Cascade project date changes to tasks using the Import Projects File-Based Data Import or FBDI to mass update project dates changes due to scope changes.
- **Additional Updatable Attributes:** The following set of project attributes are now updatable using the file-based data import. It follows the [Project, Tasks, and Financial Plan Updates Using File-Based Data Import](#) feature delivered in Update 24B. For example, update the classification code for the Funding Source category to Federal upon budget approval.
- Outline Display Level
- Planning Project
- Project Currency
- Project Currency Conversion Rate Type
- Project Currency Conversion Date Type Code
- Project Currency Conversion Date
- Allow Capitalized Interest

Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **YES**

Capitalized Interest Rate Schedule

- Capitalized Interest Stop Date
- Asset Cost Allocation Method Code
- Capital Event Processing Method Code
- Allow Charges from All Provider Business Units
- Process Cross-Charge Transactions for Labor
- Labor Transfer Price Schedule
- Labor Transfer Price Fixed Date
- Process Cross-Charge Transactions for Nonlabor
- Nonlabor Transfer Price Schedule
- Nonlabor Transfer Price Fixed Date
- Project Classifications
- Project Classification Codes
- Project Classification Code Percentage

Business Benefits :

- Increased value in integrating with third-party systems when using these expanded capabilities for the Import Project FBDI to update existing projects.
- Increased productivity by saving time performing mass updates to projects due to changes in business practices.

PROJECT PLANNING, SCHEDULING AND FORECASTING : SOURCE QUANTITY AND AMOUNT COLUMNS ON THE EDIT FORECAST AND BUDGET VERSION PAGES

Details :

Expedite project budgeting and forecasting by adding the columns for source quantity and amounts that are available in the enhanced user interface, while editing details of budgets and forecasts. Select the source quantity and amounts columns by personalizing a layout, in the edit versions page. For example, add the columns to quickly compare the source for a forecast and compare it with the ETC, making it easier to spot variance and make more informed changes. The benefit is a side-by-side comparison with the source to check the deviation, for easier management of budgeting and forecasting information on the budget and forecast lines, respectively.

Business Benefits :

- A quick side by side comparison of planned resources against the source highlights any deviations as adjustments are made to the planned quantity or amounts.
- Reduces navigation to different pages. Review and compare the source with the current plan, thus ensuring no errors are made when editing the current plan while comparing with the source.

Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **YES**

PROJECT PLANNING, SCHEDULING AND FORECASTING : SOURCE QUANTITY AND AMOUNT COLUMNS ON THE EDIT FORECAST AND BUDGET VERSION PAGES

ORACLE

Edit Budget: Bid Estimate Water Conservation Sector 1

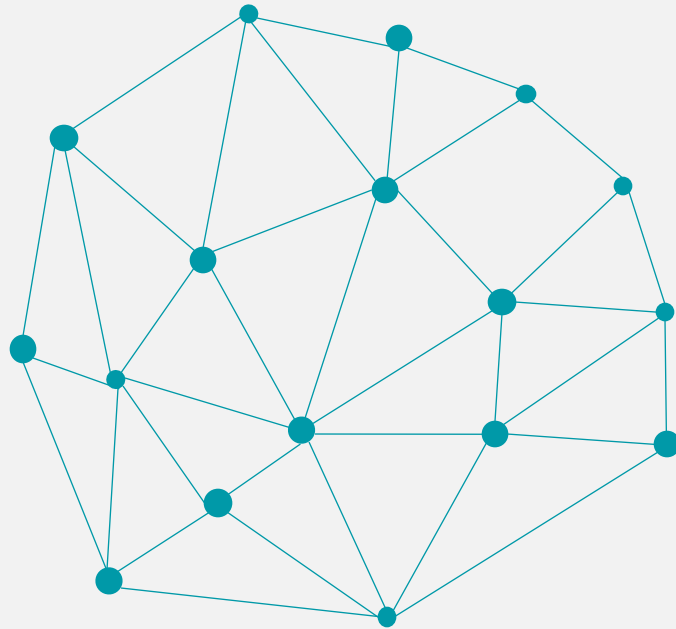
Name: Bid Estimate | Display: Task structure | Current Planning Period: May-24

Cost and Revenue Budget | Planning Level: Project and all tasks | Planning Options | Attachments: None

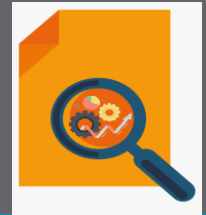
Revenue Budget: \$27,800.00 | Cost Budget: \$19,680.00 | Budget Margin: 51.80%

Actions | View | + | X | [Grid Icon] | [Filter Icon] | [Print Icon] | Detach | Go to Task | Layout: Bud_Lines

Task Number or Resource	Quantity	Source Quantity	Revenue (USD)	Revenue Rate (USD)	Raw Cost (USD)	Source Raw Cost (USD)	Raw Cost Rate (USD)	Burdened Cost (USD)	Source Burdened Cost (USD)	Burdened Cost Rate (USD)
WCS1_04012024			27,800.00		13,400.00	10,775.00		19,680.00	15,684.00	
Task 1			20,400.00		10,200.00	9,375.00		14,688.00	13,500.00	
Task 1.1			15,000.00		7,500.00	7,125.00		10,800.00	10,260.00	
Vision City Operations: Computers	500	475	15,000.00	30.00	7,500.00	7,125.00	15.00	10,800.00	10,260.00	21.60
Task 1.2			5,400.00		2,700.00	2,250.00		3,888.00	3,240.00	
Vision City Operations: Computers	180	150	5,400.00	30.00	2,700.00	2,250.00	15.00	3,888.00	3,240.00	21.60
Task 1.3										
Task 2			2,400.00		1,200.00	1,400.00		1,872.00	2,184.00	
Labor	120	100	2,400.00	20.00	1,200.00	1,400.00	10.00	1,872.00	2,184.00	15.60
Task 3			5,000.00		2,000.00			3,120.00		
Senior Executive	100		5,000.00	50.00	2,000.00		20.00	3,120.00		31.20



NEW FEATURES



QUICK WINS - OPT-INS

PROJECT RESOURCE MANAGEMENT : RATE AND PERSON TYPE FILTERS FOR EVALUATING MATCHING RESOURCES

Details :

Filter and select resources based on target rates or person type. For example, resource managers can precisely narrow the set of candidates based on target cost and bill rates to help manage the profit margin or only look for employees and not costly contingent workers.

As a resource manager edit the project resource request and specify the target rates.

Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	NO
Quick Win	YES

Edit Project Resource Request: Hillman Project NY Oracle DBA

Schedule and Role Details

* Requested Quantity

* Requested Start Date

* Requested Finish Date

Requested Hours Use project calendar

Total Requested Hours 760.0

Requested Project Role

Requested Resource

Ownership

Staffing Owner

Requester

▶ Additional Request Information

▶ Qualifications and Keywords

▶ Rates

Unit of Measure Hours

Target Rates

Cost Rate	USD	210.00
Bill Rate	USD	250.00

Resource Rates

Cost Rate

Bill Rate

PROJECT RESOURCE MANAGEMENT : RATE AND PERSON TYPE FILTERS FOR EVALUATING MATCHING RESOURCES

Next, click on Evaluate action to see all eligible resources on the Search and Evaluate page within the given range of target rates of the above request.

Search and Evaluate Resources: Hillman Project NY Oracle DBA

▶ Resource Request Details
 ▶ Resource Pools [Manage...](#)
 ▶ Resource Search Options **Search Results**
 View By Resource list
 View Compare Detach
 Clear Filters

Resource	Overall Score (%)	Qualification Score (%)	Available Capacity Score (%)	Primary Project Role	Person Type	Cost Rate	Bill Rate	Add to Shortlist	Nominate
Asha Preetam	100	No score	100	Project Manager	Employee	207.00 USD	225.00 USD		
Corinna Palermo	100	No score	100	Oracle DBA	Employee	85.00 USD	140.00 USD		
Dan Wei	100	No score	100	Business Analyst	Employee	120.00 USD	210.00 USD		
Eric Schweizer	100	No score	100	Technical Lead	Employee	80.00 USD	140.00 USD		
Jack Palermo	100	No score	100	Team Member	Contingent Worker	207.00 USD	225.00 USD		
John Patterson	100	No score	100	Team Member	Contingent Worker	207.00 USD	210.00 USD		
Leland White	100	No score	100	Oracle DBA	Employee	78.00 USD	116.00 USD		
Lucia Genovese	100	No score	100	Technical Lead	Employee	55.00 USD	210.00 USD		
Ruby Williams	100	No score	100	Team Member	Employee	207.00 USD	160.00 USD		
Shankar Subramanian	100	No score	100	Business Analyst	Employee	85.00 USD	120.00 USD		
Leroy Rivard	98	No score	98	Technical Lead	Employee	73.00 USD	124.00 USD		
Pratima Patil	61	No score	61	Technical Lead	Employee	65.00 USD	106.00 USD		

▶ Person Type
 Contingent worker (2)
 Employee (10)
 Unspecified (0)

▶ Target Cost Rates in USD
 0.00 - 210.00

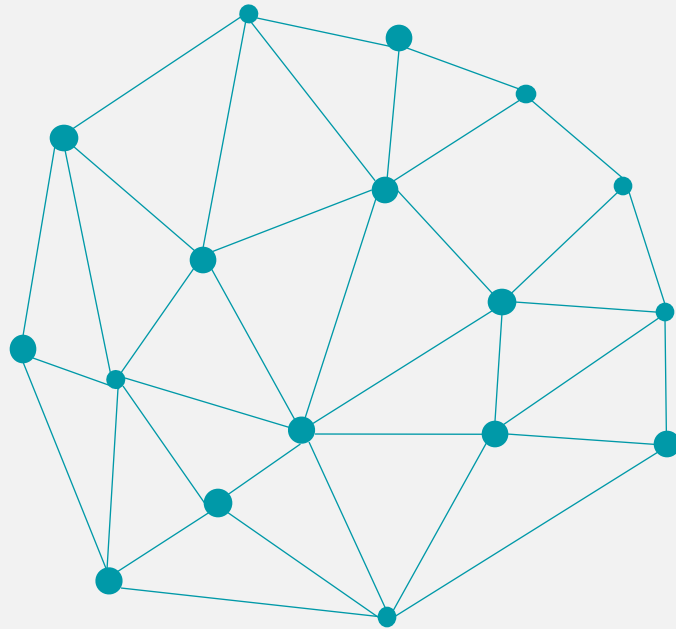
▶ Target Bill Rates in USD
 0.00 - 250.00

▶ Resource Match Thresholds Apply

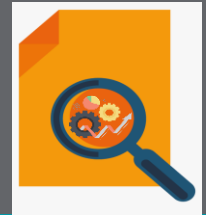
PROJECT RESOURCE MANAGEMENT : RATE AND PERSON TYPE FILTERS FOR EVALUATING MATCHING RESOURCES

Business Benefits :

- Helps resource managers maximize employee utilization by letting them pick employees over contingent workers.
- Reduces resource manager effort when searching and evaluating for resources against target cost and bill rates specified in the resource request.



NEW FEATURES



NOT QUICK WINS

PROJECT BILLING : MILESTONE BILLING AND REVENUE RECOGNITION ENHANCEMENTS

Details :

Simplify project and contract milestone completion, invoicing, and revenue recognition business processes with these capabilities:

- Use the milestone dimension to track and analyze the milestone lifecycle in multiple Oracle Transactional Business Intelligence subject areas.
- Allow project managers and project administrators to provide comments to approvers and track the status of the milestone through the status change history view.
- Import contracts and their respective milestones from external applications using Enterprise Contracts File-Based Data Import.
- Use REST APIs to create and maintain milestones in contracts and project plans.

These enhancements build on the [Milestone Billing and Revenue Recognition](#) solution introduced in update 24B.

Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **NO**

PROJECT BILLING : MILESTONE BILLING AND REVENUE RECOGNITION ENHANCEMENTS

- **Milestone Dimension in Oracle Transactional Business Intelligence Subject Areas**
- Use the attributes and measure in the new Milestone dimension in Projects subject areas in Oracle Transactional Business Intelligence, or OTBI, to build reports and dashboards to track and analyze the milestone lifecycle.

The screenshot displays the 'Subject Areas' interface in OTBI. At the top, there is a search bar and navigation icons. The main content area shows a hierarchical tree structure under the 'Milestone' subject area. The tree is expanded to show two sub-areas: 'Milestone Record Information' and 'Milestone Measures'. 'Milestone Record Information' includes four attributes: 'Milestone Created By', 'Milestone Creation Date', 'Milestone Last Update Date', and 'Milestone Last Updated By'. 'Milestone Measures' includes one measure: 'Milestone Amount in Contract Currency'. Below these, there are ten additional attributes: 'Milestone Name', 'Milestone Number', 'Milestone Description', 'Planned Finish Date', 'Actual Finish Date', 'Milestone Status', 'Billable', 'Project Element ID', and 'Contract Event ID'. Each attribute and measure is represented by a small icon consisting of three vertical bars of varying heights.

PROJECT BILLING : MILESTONE BILLING AND REVENUE RECOGNITION ENHANCEMENTS

• The Milestone dimension has been added to these subject areas:

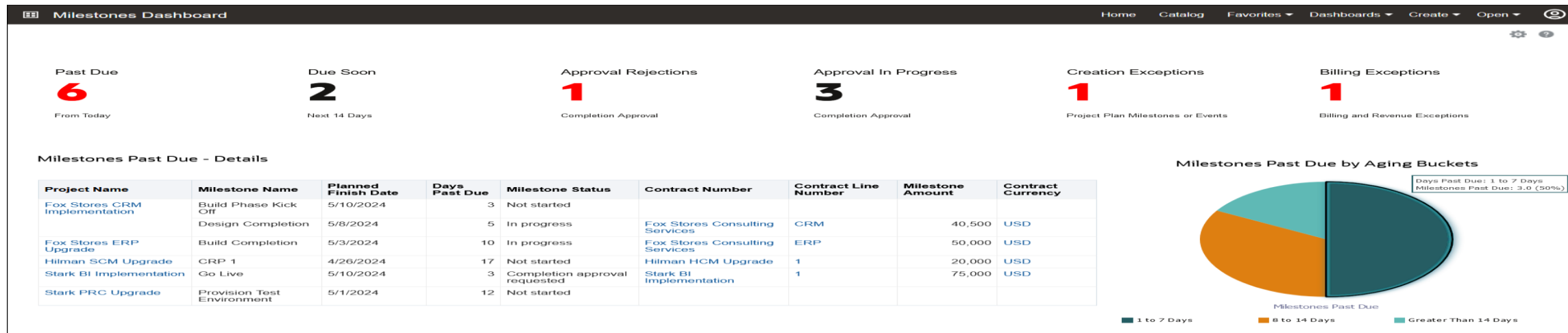
- Project Billing - Bill Transactions Real Time
- Projects - Billing and Revenue Exceptions Real Time
- Project Billing - Event Real Time
- Project Billing - Invoices Real Time
- Project Billing - Revenue Real Time
- Project Control - Financial Project Plans
- Project Control - Progress
- Project Management - Project Work Items

• The existing Milestone dimension in the Project Management - Planning Real Time and Project Management - Task Management Real Time subject areas has been changed to reflect the new definition of a milestone:

- Start Date = End Date
- Duration = 0
- Milestone Flag = Yes
- Lowest Level in a branch of the project plan = Yes

PROJECT BILLING : MILESTONE BILLING AND REVENUE RECOGNITION ENHANCEMENTS

- The following is an example Milestone dashboard created using some of the above subject area.



Example Milestones Dashboard in Oracle Transactional Business Intelligence

In this sample dashboard, the Past Due, Due Soon, Approval Rejections, and Approval In Progress performance tiles are based on attributes of the milestone dimension in the Project Management - Planning Real Time subject area. These metrics are related to all milestones, not only those associated to a contract. The Creation Exceptions and Billing Exceptions performance tiles are based on the Projects - Billing and Revenue Exceptions Real Time subject area. The contextual reports displayed for the Past Due metric are based on the Project Management - Planning Real Time and Project Billing - Bill Transactions Real Time subject areas.

PROJECT BILLING : MILESTONE BILLING AND REVENUE RECOGNITION ENHANCEMENTS

Milestone Status Change Comments and History

When requesting approval for the completion of a milestone, a user can now enter comments visible to the approver to provide additional context, thereby facilitating the approval process. Additionally, the milestone's status change history is maintained, providing an audit of changed status values, the date on which the change occurred, and who performed the change.

Change Milestone Status

From In progress

To

Actual Start Date

Actual Finish Date

Comments Client has signed off on all functional and technical design deliverables in the latest steering committee meeting held on May 10, 2024.

Change History

View Detach

From	To	Last Updated Date	Last Updated By	Comments
Not started	In progress	4/11/24	ABRAHAM.MASON	

PROJECT BILLING : MILESTONE BILLING AND REVENUE RECOGNITION ENHANCEMENTS

Task Details: Design Completion

General Predecessors Labor Resources Advanced Expense Resources Deliverables Additional Information Status History

From	To	Comments	Updated By	Updated Date ↓
Completion approval requested	Complete		Chris.Black	5/13/24
In progress	Completion approval requested	Client has signed off on all f...	Chris.Black	5/13/24
Not started	In progress		ABRAHAM.MASON	4/11/24

Business Benefits :

- Identify and resolve exceptions to proactively prevent delays in billing or revenue recognition by analyzing and tracking the lifecycle of your milestones in OTBI.
- Increase value by integrating the creation and maintenance of milestones in other existing systems.
- Improve productivity by creating or maintaining milestones in bulk using the file-based data import templates.

PROJECT BILLING : IMPROVE YOUR CONTRACT APPROVALS EXPERIENCE WITH ENHANCED UI AND ADAPTIVE SEARCH



Details :

The Approvals work area provides an enhanced user interface and adaptive search functionality. You can filter approval tasks by approval type, task type, or sender. You can access the Approvals work area from Navigator > Tools > Approvals. For this reason, it's available to set up at a site or user level. You can view the contract approval, template and clause approval notifications.

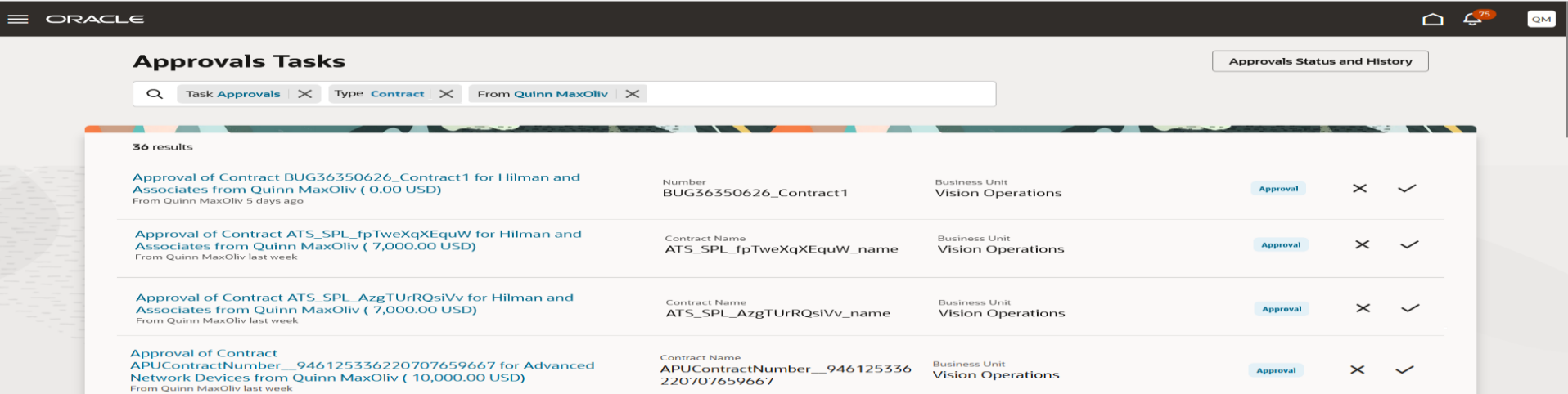
The Approvals work area has three views.

- Approval Task**

The Approvals Tasks page shows a list of the tasks assigned to the current user, including business attributes depending on approval type. You can organize your work using supplied filters, search on keywords, and approve or reject approvals.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO



PROJECT BILLING : IMPROVE YOUR CONTRACT APPROVALS EXPERIENCE WITH ENHANCED UI AND ADAPTIVE SEARCH

You can quickly address your tasks without waiting for each to complete before moving to the next approval. Supported actions include:

- Approve, Reject, Dismiss (FYIs), You can also comment on approval or rejection actions in a drawer if required.

Quick View

Click a task in the list to open the Quick View, which displays additional information about the approval and allows you to approve or reject it. You can click the arrow to navigate to the next task in the list.

To get more information or take an action that isn't yet available in the Quick View, click **View More Details** to open the Analytics Publisher or Application Development Framework (ADF) notification.

Click the Approvals Tasks link to navigate back to the list.

The screenshot displays the Oracle 'Approvals Tasks' interface. At the top, there are navigation buttons for 'Cancel', 'Reject', 'Approve', and a right-pointing arrow. The main heading reads 'Approval of Contract ATS_SPL_HzByrhqqeLeK for Hilman and Associates from Quinn MaxOliv (7,000.00 USD)'. Below this, a 'View More Details' button is visible. The interface is divided into several sections: 'Contract Name' (ATS_SPL_HzByrhqqeLeK_name), 'Business Unit' (Vision Operations), 'Intent' (Sell), 'Contract Type' (Sell : Project lines), 'Description' (ATS_SPL_HzByrhqqeLeK_Description), 'Contract Version' (1), 'Start Date' (3/13/24), 'End Date' (3/15/25), 'Version Description' (ATS_SPL_HzByrhqqeLeK_versionDesc), 'Submitter' (Quinn MaxOliv), 'Creation Date' (3/15/24), 'Assignee' (Quinn MaxOlivia), 'Assigned Date' (3/15/24), and 'Status' (In Progress). At the bottom, a 'Lines' table is shown with one entry: Line 1, Name: Free Form, Amount: \$7,000.00.

Line Number	Name	Amount
Line1	Free Form	\$7,000.00

PROJECT BILLING : IMPROVE YOUR CONTRACT APPROVALS EXPERIENCE WITH ENHANCED UI AND ADAPTIVE SEARCH

- **Approval Status and History**

Click **Approvals Status and History** to view the current status and assignee for approvals that you've either submitted or been an approver for.

Use the supplied filters and search by keyword to find historic approval information.

The screenshot displays the 'Approvals Status and History' interface. At the top, there is a search bar with the text 'Submitted By Others' and a filter for 'Submitted By Quinn MaxOliv 26' and 'Created This Month 18'. Below the search bar, a table lists 29 results. The table has the following columns: Title, Assigned To, Submitted By, Submission Date, Last Activity Time, and Status. The table contains seven rows of data, each representing an approval record.

Title	Assigned To	Submitted By	Submission Date	Last Activity Time	Status
Approval of Contract APUContractNumber_7500230476499408808489 for Advanced Network Devices from Quinn MaxOliv (10,000.00 USD)	Quinn MaxOlivia	Quinn MaxOliv	3/15/24	last week	Approved
Approval of Contract APUContractNumber_9922314945442309961887 for Advanced Network Devices from Quinn MaxOliv (10,000.00 USD)	Quinn MaxOlivia	Quinn MaxOliv	3/15/24	last week	Rejected
Approval of Contract ATS_SPL_iDRqhFwgCarR for Hilman and Associates from Quinn MaxOliv (7,000.00 USD)	Quinn MaxOlivia	Quinn MaxOliv	3/15/24	last week	Rejected
Approval of Contract ATS_SPL_plHuRUyftnMx for Hilman and Associates from Quinn MaxOliv (7,000.00 USD)	Quinn MaxOlivia	Quinn MaxOliv	3/14/24	last week	Rejected
Approval of Contract ATS_SPL_yLSSZdbfCLkw for Hilman and Associates from Quinn MaxOliv (7,000.00 USD)	Quinn MaxOlivia	Quinn MaxOliv	3/14/24	last week	Approved
Approval of Contract ATS_SPL_VYxHLPomiZtu for Hilman and Associates from Quinn MaxOliv (7,000.00 USD)	Quinn MaxOlivia	Quinn MaxOliv	3/14/24	last week	Approved
Approval of Contract ATS_SPL_zlUQqfhWycZh for Hilman and Associates from Quinn MaxOliv (7,000.00 USD)	Quinn MaxOlivia	Quinn MaxOliv	3/14/24	last week	Approved

The Approvals work area is designed and built with performance as a priority. The user experience is improved for both desktop and tablet or mobile users, making it easy to act quickly on approval tasks and notifications.

PROJECT BILLING : SERVICE EXCELLENCE CONTINUING INVESTMENTS FOR BILLING AND REVENUE MANAGEMENT

Details :

In this update, improvements are available in the following areas:

- **Deletion of Credit Memos for LOC-enabled Awards:** Delete a credit memo or credit invoice in draft, approved, or approval rejected status for LOC-enabled Awards using the Delete Invoices ESS process. This flexibility reduces the manual work for billing specialists to review and process an unwanted credit memo or credit invoice to Receivables and generate a rebill standard invoice. Based on [Idea 646283](#) from the Project Management Idea Labs on Oracle Cloud Customer Connect.
- **Cancel Project Contract Invoice REST API:** You can perform the crediting action of canceling invoices using a REST API on single or multiple standard project contract invoices. The cancel invoice crediting action using the REST API is allowed on original standard invoices in Released, Transferred, or Accepted status. Also, the project contract has to be in Active, Expired, or Under-amendment status with versioning.

When the cancel crediting action is performed on an original standard invoice using REST API, a credit invoice is created, which is the reversal of the original invoice or the reversal of the remaining amount on the original invoice. Based on [Idea 730325](#) from the Project Management Idea Labs on Oracle Cloud Customer Connect.

Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **NO**

PROJECT BILLING : SERVICE EXCELLENCE CONTINUING INVESTMENTS FOR BILLING AND REVENUE MANAGEMENT

Flexible Billing Event Adjustment Processing: Gain more control over billing event adjustment processing by allowing the update of event types and billing events. The additional flexibility eliminates the need to define new event types and change corresponding business processes, improving operational efficiency. This flexibility also enables the use of existing events to reflect the corrected bill amounts after a crediting action.

The project application administrator can update the allow adjustments option on existing event types with billing events entered, and the event type is not associated with a project process configurator or not a migration event type. When the allow adjustments, option is unchecked on an existing event type, the user is not allowed to perform adjustments such as hold invoice or revenue indefinitely, hold invoice once, or update the event amount or description on the fully invoiced or revenue-recognized billing events entered for that event type. Also, with the allow adjustments option unchecked on the event type, retroactive project contract amendment will not mark the billed transactions for adjustment.

The users can perform event adjustments such as updating the event amount or description or performing hold invoice indefinitely or once on fully credited billing events in un-invoiced status entered for an invoice event type with the allow adjustments option unchecked after the cancel credit invoice is processed to release status.

PROJECT BILLING : SERVICE EXCELLENCE CONTINUING INVESTMENTS FOR BILLING AND REVENUE MANAGEMENT

- **Improvements to Real-Time WIP Reporting:** Improved reporting capability through the addition of new attributes and measures to the bill transactions subject area in OTBI, such as a normalized attribute for unit price. Corresponding additions to the bill transactions REST API, such as billing status and WIP amount, will both improve reporting and integration capabilities for customers, as well as support the delivery of the upcoming Redwood-based user experience for managing bill transactions. Specific changes include:
 - The Grants Administrator, Grants Accountant, Grants Department Administrator, and Principal Investigator roles now have access to the Project Billing - Bill Transactions Real Time subject area in OTBI, along with data access commensurate with each role. This is in addition to existing access for the Project Managers and Project Billing Specialist roles.
 - The Awards folder and subfolders have been added to the Project Billing - Bill Transactions Real Time subject area in OTBI.

Business Benefits :

- Improved operating efficiency for LOC-enabled awards and billing event adjustment processing.
- Expanded OTBI reporting to track and manage WIP billing.
- For Project Invoice Cancellation with a REST API:
- System integrators, administrators, and developers can create new or extend existing integration and automation solutions for crediting action of canceling invoices.
- Leverage complementary offerings such as the Oracle Visual Builder Add-in for Excel to create user-friendly workbooks to perform the cancel project contract invoice crediting action.

PROJECTS COSTING : SERVICE EXCELLENCE CONTINUING INVESTMENTS FOR COST MANAGEMENT AND CONTROL

Details :

In this update, improvements are available in the following areas:

- **Payroll Costs Deletion Control:** Control the ability to delete payroll costs that have not been successfully distributed to projects. A new privilege, Delete Project Labor Distributions in Error, is provided to determine which roles can delete payroll costs. Add this privilege to custom roles to allow for the delete functionality.
- **Payroll Costs Redistribution Control:** Reducing the amount of unnecessary adjustments to payroll costs is crucial for maintaining efficient and effective project cost management. Payroll costs will only be redistributed using labor schedules if the distribution rules have changed. Perform the redistribution of payroll costs with confidence that new project costs are generated only when the rules have changed, reducing unnecessary reversals that affect downstream project cost processes. A new privilege, Process Costs with Unchanged Project Labor Distributions, is provided to determine which role in your organization can perform this action. Add this privilege to custom roles to allow for the redistribution functionality.

Business Benefits :

- Increased value in data correctness by cleaning up undistributed payroll costs based on business needs.
- Increased efficiency from streamlined processing of adjustments to payroll costs.

Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **NO**

PROJECT MANAGEMENT COMMON : PROJECTS REST API SECURITY ENHANCEMENTS

Details :

- Control project access when using the Projects REST APIs with the security configuration. Application administrators can assign data security policies to project roles to get secured access to projects when using Projects REST APIs. For example, create policies and roles for project managers to provide access only to the projects that they are authorized to, when using the Projects REST APIs.
- This enhancement has no impact on the existing roles. The current security still applies. Optionally, you can create a custom role to assign to users to meet your specialized security requirements. Detailed steps are listed in the Steps to Enable section below.

Business Benefit :

- With this feature, enable selective access to projects via the Projects REST APIs in your PaaS solutions. For instance, in any custom integration using the Projects REST API, project managers or project administrators will have access solely to the projects they are authorized to manage.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

PROJECT MANAGEMENT COMMON : PROJECTS REST API SECURITY ENHANCEMENTS

❖ Steps to Enable :

- Review the REST service definition in the REST API guides to leverage (available from the [Oracle Help Center](#) > *your apps service area of interest* > APIs & Schema). If you are new to Oracle's REST services you may want to begin with the Quick Start section.
- Here are the detailed steps to grant project manager access to Projects REST API to access only their projects:



PROJECT MANAGEMENT COMMON : APPROVALS WORK AREA WITH ENHANCED USER INTERFACE AND ADAPTIVE SEARCH FOR PROJECT MANAGEMENT

Details :

- Use the Approvals work area to review and take action on your Project Management approval tasks. The Approvals work area provides an enhanced user interface and adaptive search functionality where tasks can be filtered by approval type, task type, or sender, or be searched by keyword.
- This feature leverages the [Approvals Work Area With Enhanced User Interface and Adaptive Search](#) feature in Oracle Fusion Cloud and Common Technologies and User Experience in 24A. Please refer to the link provided for further information regarding the Approvals work area and its available views.
- The work area presently provides access to the following Project Management workflows:

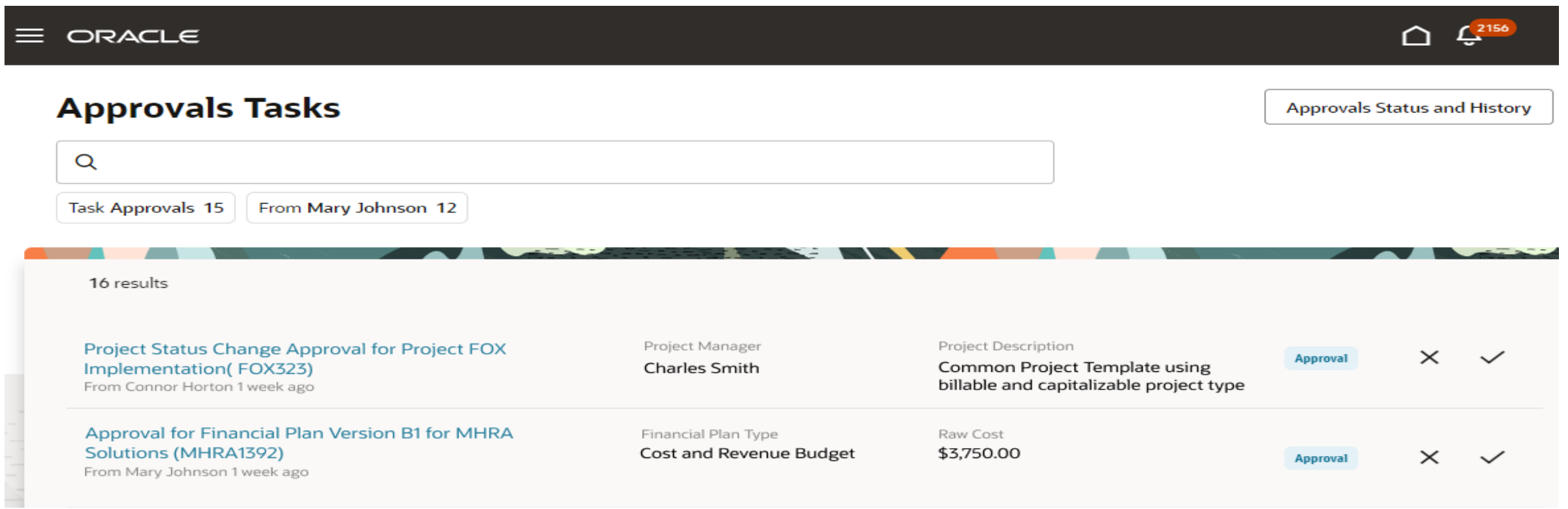
Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	NO
Quick Win	NO

Module	Workflow
Planning, Scheduling and Forecasting	Project Status Change Approval
Planning, Scheduling and Forecasting	Project Status Change Approval
Cost Management and Control	Project Cost Adjustment Approval
Cost Management and Control	Project Expenditure Batch Approval
Cost Management and Control	Project Labor Schedule Version Approval

PROJECT MANAGEMENT COMMON : APPROVALS WORK AREA WITH ENHANCED USER INTERFACE AND ADAPTIVE SEARCH FOR PROJECT MANAGEMENT

- The Approvals Tasks page shows a list of the tasks assigned to the current user, including business attributes related to the approval type. You can organize your work using supplied filters, search on keywords, and approve or reject approval requests.



The screenshot shows the Oracle Approvals Tasks interface. At the top, there is a navigation bar with the Oracle logo and a notification bell showing 2156 alerts. The main heading is "Approvals Tasks" with a button for "Approvals Status and History". Below the heading is a search bar and two filter buttons: "Task Approvals 15" and "From Mary Johnson 12". The results section shows 16 results. Two results are visible in a table format:

Task Title	Project Manager	Project Description	Action	Filter
Project Status Change Approval for Project FOX Implementation(FOX323) From Connor Horton 1 week ago	Charles Smith	Common Project Template using billable and capitalizable project type	Approval	X ✓
Approval for Financial Plan Version B1 for MHRA Solutions (MHRA1392) From Mary Johnson 1 week ago	Financial Plan Type Cost and Revenue Budget	Raw Cost \$3,750.00	Approval	X ✓

PROJECT MANAGEMENT COMMON : APPROVALS WORK AREA WITH ENHANCED USER INTERFACE AND ADAPTIVE SEARCH FOR PROJECT MANAGEMENT

- Click a task in the list to open the Quick View, which displays additional information about the task and allows you to approve or reject it. You can click the arrow to navigate to the next task in the list.

Project Details

Project Manager Charles Smith	Project Description Common Project Template using billable and capitalizable project type	Creator Connor.Horton
Created 1/9/24	Project Start Date 1/1/24	

Project Status Approval

Project Status Active → Submitted	Project Status if approved Approved	Project Status if rejected Rejected
--------------------------------------	--	--

Financial Summary

ITD Budget Cost
\$150,000.00

Submitter
Connor Horton

Creation Date
1/9/24

Assignee
Charles Smith

Assigned Date
1/9/24

Status
In Progress

[View More Details](#)

Business Benefits:

- The enhanced approvals work area increases efficiency in viewing and approving tasks.
- Users can act quickly on approval tasks and notifications using the important information provided against each workflow.

PROJECT COSTING : BUDGETARY CONTROL AT THE PROJECT TASK OR LOWEST RESOURCE

Details :

Control spending based on the budget allocated to project tasks, either at the top task or the lowest task of the work breakdown structure. Additionally, control spending by the amounts planned for the lowest resource within the project budget. Flexible options to control spending by project, task, or resource allow project users to manage costs as needed by their businesses, thus reducing the risk of overspending.

Budgetary control at the task level provides detailed level spending control. For example, control the budget for each phase of the project, where a top task represents a phase of work with its own distinct budget. For each task, optionally add budgetary controls for each type of cost, such as controlling labor costs or supplier costs. The resource breakdown structure (RBS) allows for further granular control. For example, control labor or supplies within different departments, where the top resource represents the department, and the lowest resource represents the type of cost.

Note that task and lowest resource controls are an addition to the existing budgetary controls architecture, which already supports project and top resource controls, to validate project-related costs. Also, existing solution supports funding source controls for sponsored projects.

Impact Analysis	
Impact Level	HIGH
Need to Enable	NO
Configuration	YES
Quick Win	NO

To define the budgetary control by task or resource for a project, select the appropriate budgetary control settings on the planning options while creating the project budget.

- Select the Resource Control option to indicate whether to control costs for top resources or lowest resources. For example, set controls for specific types of costs or named persons. Alternatively, set controls at a top resource for an organization or cost category.
- Select the Task Control option to control costs for top tasks or lowest tasks.
- After selecting the resource and task controls, generate the control budget combinations. For sponsored project budgets, additional control by funding source is available.
- Select both the Control Level (Absolute, Advisory or Track) and Tolerance Percentage for the control budgets based on the need for controlling costs.

PROJECT COSTING : BUDGETARY CONTROL AT THE PROJECT TASK OR LOWEST RESOURCE

Create Budget: Planning Options Water Conservation Sector 1

* Name: Estimate Budget

Financial Plan Type: Budget Control FPT - Advisory Control

Budget Creation Method: Generate from Another Source

Source Details

* Budget Generation Source: Project plan type

* Source Plan Version: Current Working

Budget Creation Details

Control Budget Details

Resource control
 Top resource
 Lowest resource

Task control
 Top task
 Lowest task

* Default Rate Type: PRJ_Corporate

Generate Combinations

Control Budget	Control Level	Tolerance Percentage
Project	Absolute	
Project and Top Task	Absolute	
Project, Top Task, and Lowest Resource	Advisory	

- The control budgets listed under Control Level Details are created when the budget is set to baseline. Use the Baseline Budget Review dialog box to review and validate the current working budget cost, current baseline budget cost, consumed amounts, and the proposed increase or decrease in budget amounts for the respective control budgets.

PROJECT COSTING : BUDGETARY CONTROL AT THE PROJECT TASK OR LOWEST RESOURCE

- Once the budget is set to baseline status, any applicable charges for the project are subjected to budgetary control validation. All applicable control budgets are validated for both raw and burdened costs. The View Funds Results dialog box shows the budgetary control validation results.

ORACLE

Requisition: 318

Requisitioning BU: Vision City Operations
Entered By: Pappu Sri
Description: Airfare expenses

Check Funds View Life Cycle Actions Done

Funds Check: Requisition 318

View: Transaction

Transaction Lines Impacted by Control Budgets

View Format Funds Status: All

Status	Requested	Project Burden	Control Budget	Task Number	Expenditure Type
Passed budgetary control validation	49.99 USD	No	WCS1_04012024_WCS1_04012024	1.1	Airfare
Passed budgetary control validation	16.00 USD	Yes	WCS1_04012024_WCS1_04012024	1.1	Overhead
Passed budgetary control validation	49.99 USD	No	WCS1_0412024_WCS1_04012024_Top_Task	1.1	Airfare
Passed budgetary control validation	16.00 USD	Yes	WCS1_0412024_WCS1_04012024_Top_Task	1.1	Overhead
Passed budgetary control validation	49.99 USD	No	WCS1_0412024_WCS1_04012024_Top_Task_Low_Res	1.1	Airfare
Passed budgetary control validation	16.00 USD	Yes	WCS1_0412024_WCS1_04012024_Top_Task_Low_Res	1.1	Overhead

Done

Requisition Lines

Actions View Format Freeze Detach

Line	Item	Description	Funds Status	Order	Line Life Cycle
1		Airfare expenses	Passed		

Rows Selected 1 Columns Hidden 13

Line 1: Details

PROJECT COSTING : BUDGETARY CONTROL AT THE PROJECT TASK OR LOWEST RESOURCE

- Here's an example of a labor cost in the Manage Project Costs page with the budgetary control validation results.

The screenshot shows the Oracle Manage Project Costs interface. A modal window titled "Funds Reservation: Expenditure Item 8400827" is open, displaying a table of transaction lines impacted by control budgets. The table has columns for Status, Requested, Project Burden, Control Budget, and Expenditure Type. The data is as follows:

Status	Requested	Project Burden	Control Budget	Expenditure Type
Passed budgetary control validation	4.80 USD	Yes	WCS1_04012024_WCS1_04012024	Overhead
Passed budgetary control validation	15.00 USD	No	WCS1_04012024_WCS1_04012024	Professional
Passed budgetary control validation	15.00 USD	No	WCS1_0412024_WCS1_04012024_Top_Task	Professional
Passed budgetary control validation	4.80 USD	Yes	WCS1_0412024_WCS1_04012024_Top_Task	Overhead
Track control level setting, transaction	15.00 USD	No	WCS1_0412024_WCS1_04012024_Top_Task_Low_Res	Professional
Track control level setting, transaction	4.80 USD	Yes	WCS1_0412024_WCS1_04012024_Top_Task_Low_Res	Overhead

Business Benefits :

- The business benefits of budgetary control by task and lowest resource are:
- Improved strategy to control spending at a granular level. This reduces the risk of overspending and promotes the successful delivery of projects within budget.
- Improved monitoring of costs to bring attention to potential changes to the organization's budget.
- Improved decision-making when using the clear, easy to understand, and refined user interface to define the spending controls.

PROJECT MANAGEMENT COMMON : IMPROVED EXPERIENCE FOR MANAGING STATUSES

Details :

Enhancements to the Manage Project Statuses page help implementors to find and manage statuses for business objects such as projects, progress, milestones, and bill transactions. In future updates, implementors will be able to manage statuses for additional business objects using this status model.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	NO

ORACLE
Manage Project Statuses

Status Objects

Status Object	Workflow for Status Changes	Define Status Lifecycle	Control Initial Status	Define Status Action Controls	Description
Project	✓	✓	✓	✓	Statuses for projects.
Bill Transaction	—	—	—	—	Statuses for project contract bill transactions.
Milestone	✓	—	—	—	Statuses for project milestones.
Progress	—	—	—	—	Statuses for project progress.

Status Classifications

Status Classification	Create New Statuses	Description
Active	✓	Project system status is active.
Closed	✓	Project system status is closed.
Draft	✓	Project system status is draft.
Pending close	✓	Project system status is pending close.
Submitted	✓	Project system status is submitted.

Statuses

Status Classification	Status	Description	From Date	To Date	Initial Status	Next Allowable Status Type	Enable Workflow
Pending close	Pending Close	The project is pending close.	8/16/97	m/d/yy	<input type="checkbox"/>	Status Classification	—

Status Action Controls

Status Classification	Status	Action	Allow
Pending close	Pending Close	Create new transactions	✓
Pending close	Pending Close	Adjust transactions	✓
Pending close	Pending Close	Capitalize assets	✓
Pending close	Pending Close	Summarize project data	✓
Pending close	Pending Close	Capitalized interest	✓
Pending close	Pending Close	Create burden transactions	✓
Pending close	Pending Close	Progress reporting by team members	✓

Status Lifecycle

Status Classification	Status	Next Allowable Status
Pending close	Pending Close	Closed

A summary of changes to the Manage Project Statuses page and associated terminologies:

- **Status Objects** (formerly known as Status Types). These are the business objects that have adopted the centralized project status model. As of Update 24C, this includes Project, Bill Transaction, Milestone, and Progress. Predefined settings for each status object control the status-related functionality available to implementors. Select a status object to configure the Status Classifications and Statuses for that object.
- **Status Classifications** (formerly known as System Statuses). These are the statuses seeded by Oracle that typically determine out-of-the-box application behaviors. The name change better aligns with objects that have a similar purpose, such as Bill Method Classifications. Select a status classification to configure the associated statuses.
- **Statuses**. Largely unchanged in this release, with the exception that the Next Allowable Status Type field (which controls which statuses are allowed next) has been moved to this region to improve visibility. The list of values associated with this field has also been updated to reflect the changes in object names above. The selected status will determine whether the Status Action Controls and/or the Status Lifecycle regions are shown, subject to enablement at the status object.
- **Status Action Controls**. Unchanged.

PROJECT MANAGEMENT COMMON : IMPROVED EXPERIENCE FOR MANAGING STATUSES

- **Status Lifecycle** (formerly known as Next Allowable Statuses). As above, the Next Allowable Status Type has moved to the Statuses region.

Business Benefits :

- An easier to use, centralized model for managing the statuses of project-related business objects.
- A centralized status model will improve consistency in end-user experience across the Project Management service.

PROJECT PLANNING, SCHEDULING AND FORECASTING : SERVICE EXCELLENCE

CONTINUING INVESTMENTS FOR PLANNING, SCHEDULING, AND FORECASTING



Details :

In this update, improvements are available in the following areas:

- **Automatic Inclusion of Project Costs and Revenue on Copied Forecast Version:** Bring the actual costs into the forecast version without an additional step to refresh costs on a forecast version when the same has been created using a creation method as copy. Additionally, confirm the target planning options are rendered and used in forecast version creation during the creation by copy method.
- **Enhancements to Change Orders Reporting:** Use Oracle Transactional Business Intelligence to report on the budget impact details made available with the [Change Order Automation for Project Budget Adjustments](#) feature delivered in Update 24A. For example, get the list of all unapproved change orders by project, or get the revenue impact from change orders by tasks or resources.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	NO

PROJECT PLANNING, SCHEDULING AND FORECASTING : SERVICE EXCELLENCE

CONTINUING INVESTMENTS FOR PLANNING, SCHEDULING, AND FORECASTING

The following measures have been added to the Change Order Impact Details Measures folder in the Project Management - Change Management Real Time OTBI subject area:

- Quantity
- Raw Cost
- Burdened Cost
- Revenue
- Raw Cost in Project Currency
- Burdened Cost in Project Currency
- Revenue in Project Currency
- Raw Cost in Project Ledger Currency
- Burdened Cost in Project Ledger Currency
- Revenue in Project Ledger Currency

The following measures have been added to the Change Management Measures folder:

- Number of Change Orders with Impacts - Calculated metric that shows the number of change orders that have an impact defined based on the current filter criteria.
- Number of Change Orders with Impact Details - Calculated metric that shows the number of change orders that have an impact detail defined based on the current filter criteria.
- Number of Change Orders with either Impacts or Impact Details - Calculated metric that shows the number of change orders that have either an impact or impact detail defined based on the current filter criteria.

- **Deferred Mode for Cascading Project Date Changes to Project Plan:** Perform cascading of project date changes to tasks in deferred mode for high-volume project plans. The application will initiate the cascade operation in deferred mode based on the time taken for the previous attempt or an indicator tracked for an unsuccessful attempt of cascade operation.
- **Microsoft Project 2021 Integration Certification with Project Management:** Microsoft Project 2021 is now certified for use with Fusion Cloud Project Management.

Business Benefits :

- Including project costs and revenue and copied forecast versions reduces additional steps for project managers and project administrators to bring the project's costs or revenue to a copied version.
- Expanding OTBI to cover additional measures related to change orders enables project managers to report on and track these changes in detail and easily share reports with stakeholders.
- Deferring project date change cascade to the project plan improves overall performance and usability for project managers.
- Certifying Microsoft Project 2021 continues support of tool for project managers and administrators.

PROJECT RESOURCE MANAGEMENT : SERVICE EXCELLENCE CONTINUING INVESTMENTS FOR RESOURCE MANAGEMENT

Details :

In this update, improvements are available in the following areas:

- Consistent Search Experience for Manage Resource Schedules:** Experience seamless searching within Manage Resource Schedules, mirroring the familiar search functionality of Manage Resources. The consistency of search across both pages ensures a cohesive and unified approach for resource managers while searching for project resources. This replaces an earlier version of the search experience. You will need to recreate any saved searches in this new search interface.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

Overview **Manage Resource Schedules** x

Manage Resource Schedules Done

Search Advanced Saved Search Current members of my pools ▼

** At least one is required

** Name	<input type="text"/>	** Job Title	<input type="text"/>
** Resource Pool	<input type="text"/>	** Pool Owner	<input type="text" value="Connor Horton"/>
** Organization	<input type="text"/>	<input type="checkbox"/> Include future resources	
** Primary Project Role	<input type="text"/>		

Search Reset Save...

- **Performance Improvements for Project Resource Assignment Creation and Adjustment:** Manage long duration project resource assignments efficiently, using options that ensure assignment duration follows best practices. This greatly improves performance when creating and adjusting assignments. Currently, when project resource assignments are created or adjusted, data is generated or updated for each day of the assignment. In working with customers, we have encountered situations where project or resource managers create extra-long assignments of 50 years or more. This unintentionally had negative impacts on overall performance and the creation of unnecessary detailed schedule data. This detailed schedule data is used for many things, including available capacity, over-allocation checks, and reporting purposes.

The following profile options are provided for managing the assignment data:

- **Threshold Value for Maximum Number of Years for Resource Assignment Duration:** This limits resource assignments' duration, and the subsequent generation of daily assignment data, to a maximum of 25 years. It is automatically enabled in this release. The value can be changed to limit assignments to a shorter or longer duration. Increasing this threshold value to a longer duration, however, will negatively impact performance.
- Two additional profile options and a scheduled process allow for greater performance improvement by controlling the amount of daily assignment data generated regardless of assignment duration. These are delivered disabled:

Threshold Value for Maximum Number of Years to Maintain Past Assignment Daily Hours Data: Recommended value for optimal performance is 2 years.

Threshold Value for Maximum Number of Years to Maintain Future Assignment Daily Hours Data: Recommended value for optimal performance is 5 years

- **Populate Project Resource Assignment Daily Hours (Scheduled process):** Schedule the process to run twice a month to progressively maintain the detailed schedule data. When you enable these additional two profile options, the system must continue to meet the past and future assignment data threshold values by generating and maintaining the daily assignment data.

For example:

- Threshold Value for Maximum Number of Years to Maintain Future Assignment Daily Hours Data: 5 years
- Threshold Value for Maximum Number of Years to Maintain Past Assignment Daily Hours Data: 2 years
- Two weeks from today, the scheduled job will execute and generate 2 additional weeks of future daily data for assignments running longer than 5 years into the future. The process will also trim two weeks of historical daily data, retaining only the most recent 2 years.

Business Benefits :

- Quickly manage resources with a new search experience.
- Ensure long-term application performance with guardrails that prevents inadvertent creation of unnecessarily long resource assignments.

PROGRAM MANAGEMENT AND REPORTING : DESCRIPTIVE FLEX FIELD FOR PROGRAM MANAGEMENT



Details :

Gain granular control over your program data with Descriptive Flex fields (DFF). Enable and manage additional attributes tailored to your specific needs, directly within the Program Management flow.

How to manage Descriptive Flex fields for programs using the User Interface:

- Log in with a program manager account and navigate to **Projects > Programs**.
- Click the **Programs** tab and click the program that you want to manage. The program details appear.
- Navigate to the **Additional information** section within the program details. This section allows you to manage the deployed descriptive flex fields for that program.

Business Benefits :

- **Enhanced Data Capture:** Capture granular details relevant to your programs, ensuring comprehensive data collection for informed decision-making.
- **Increased Flexibility:** Adapt your program data structure to accommodate evolving needs and unique program requirements.
- **Standardized Data Collection:** Ensure consistent data capture across your programs by defining standard flex field attributes.

Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

PROGRAM MANAGEMENT AND REPORTING : DESCRIPTIVE FLEX FIELD FOR PROGRAM MANAGEMENT



Note that the Additional information section will be visible only after you've created and saved the program; in other words, after completing the initial Describe program step.

Edit Program

Additional information

Business Unit
Reliance

Location
Country

Program ID
300100587157592

Country
India

Cancel Save Done

4 | 4

- Describe program
- Invite members
- Add projects
- Additional information

PROGRAM MANAGEMENT AND REPORTING : SERVICE EXCELLENCE

CONTINUING INVESTMENTS FOR PROGRAM MANAGEMENT AND REPORTING



Details :

In this update, improvements are available in the following areas:

- Project Drill-Down while Analyzing Programs:** Get a deeper dive into individual project performance with a streamlined drill-down capability. Program managers can now directly navigate to the Review Project Performance page from the Analysis page within Program Management. Based on Idea [658507](#) from the Project Management Idea Labs on Oracle Cloud Customer Connect.

- Gain Deeper Insights with New Program Financial Measures for Billing:** Stay on top of your program's financial health using measures added to the analysis work area:

- Amount to Bill:** This measure provides the outstanding amount yet to be billed for a program. This allows the program manager to proactively manage cash flows and ensure timely client invoicing.

- Unpaid Invoice Amount:** Gain insights into the total amount of unpaid invoices associated with contracts linked to single projects within a program. This measure helps identify potential payment delays and facilitates faster resolution.

Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	NO

PROGRAM MANAGEMENT AND REPORTING : SERVICE EXCELLENCE

CONTINUING INVESTMENTS FOR PROGRAM MANAGEMENT AND REPORTING

.Business Benefits :

- Quickly navigate to project details to dig deeper on exceptions for the program.
- Obtain a comprehensive view of your program's financial standing, with additional key metrics for billing.
- Proactively address potential billing issues and ensure a smooth financial experience for your clients.

MASTEK
is here to
help you!

THANK YOU

