

**LIVE**  
13/07/22

**Evosys • Live**

Advisory  
Webinar

# 22 C – Cloud PPM

Empowering you for the next update



ORACLE

Partner



**Host:** Hardik Patel  
Operation Manager  
Lead Marketing

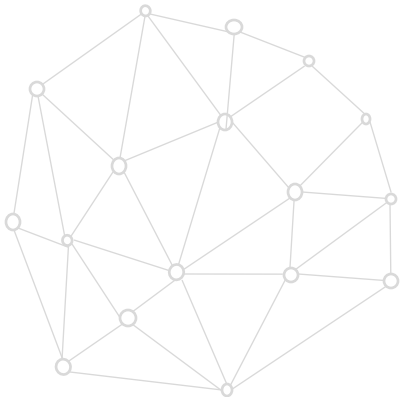
**Speaker:** Ami Jatakiya  
Consultant



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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.



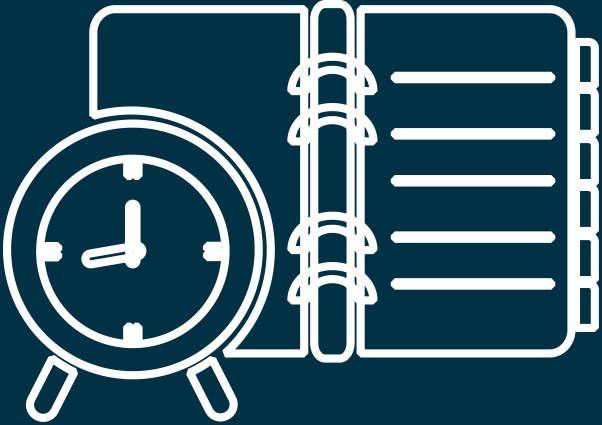
## Disclaimer



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# AGENDA



## Our Approach to Oracle Update

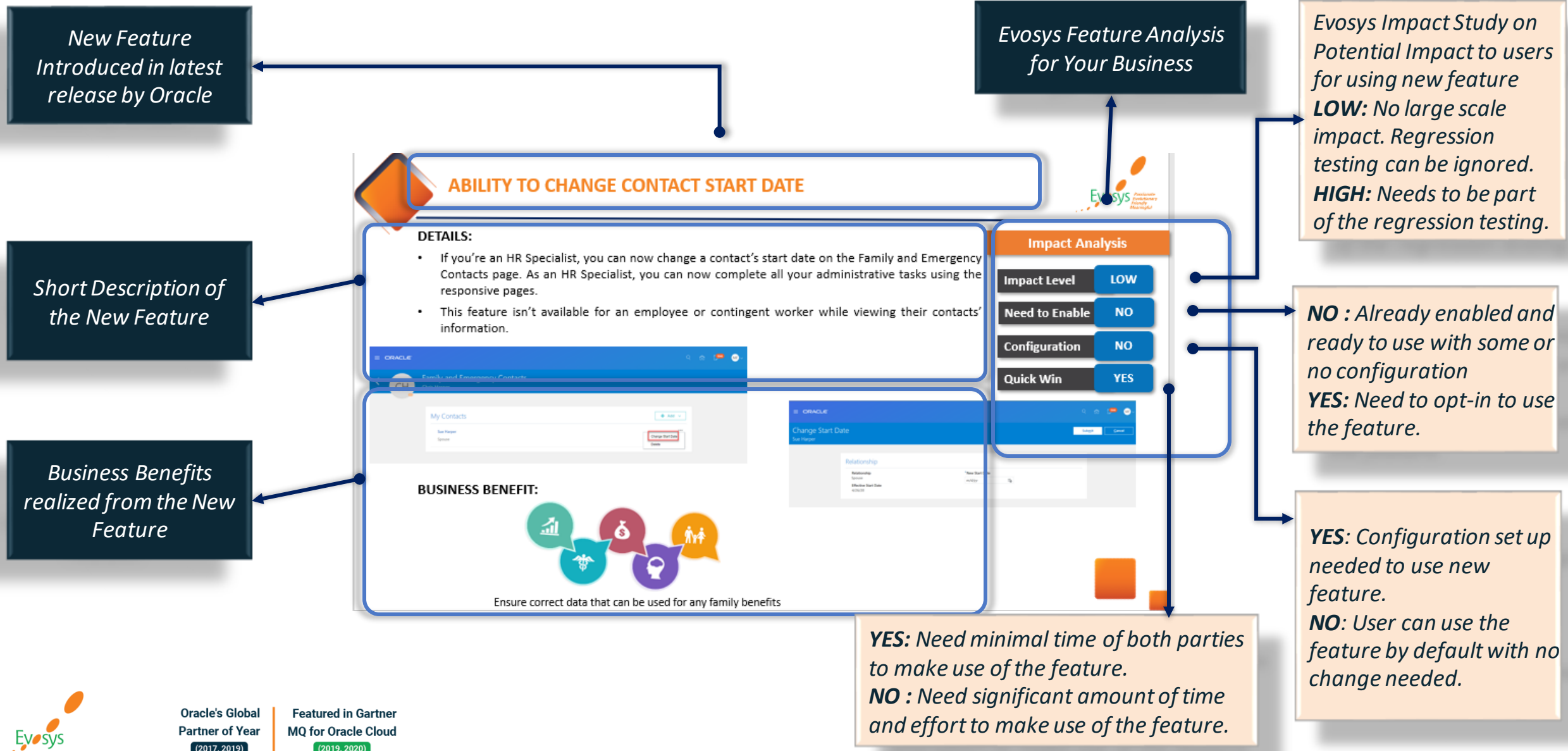
## Our Analysis of Latest Release

- New Features
- Known Issues (If any)

## Closing - Q&A



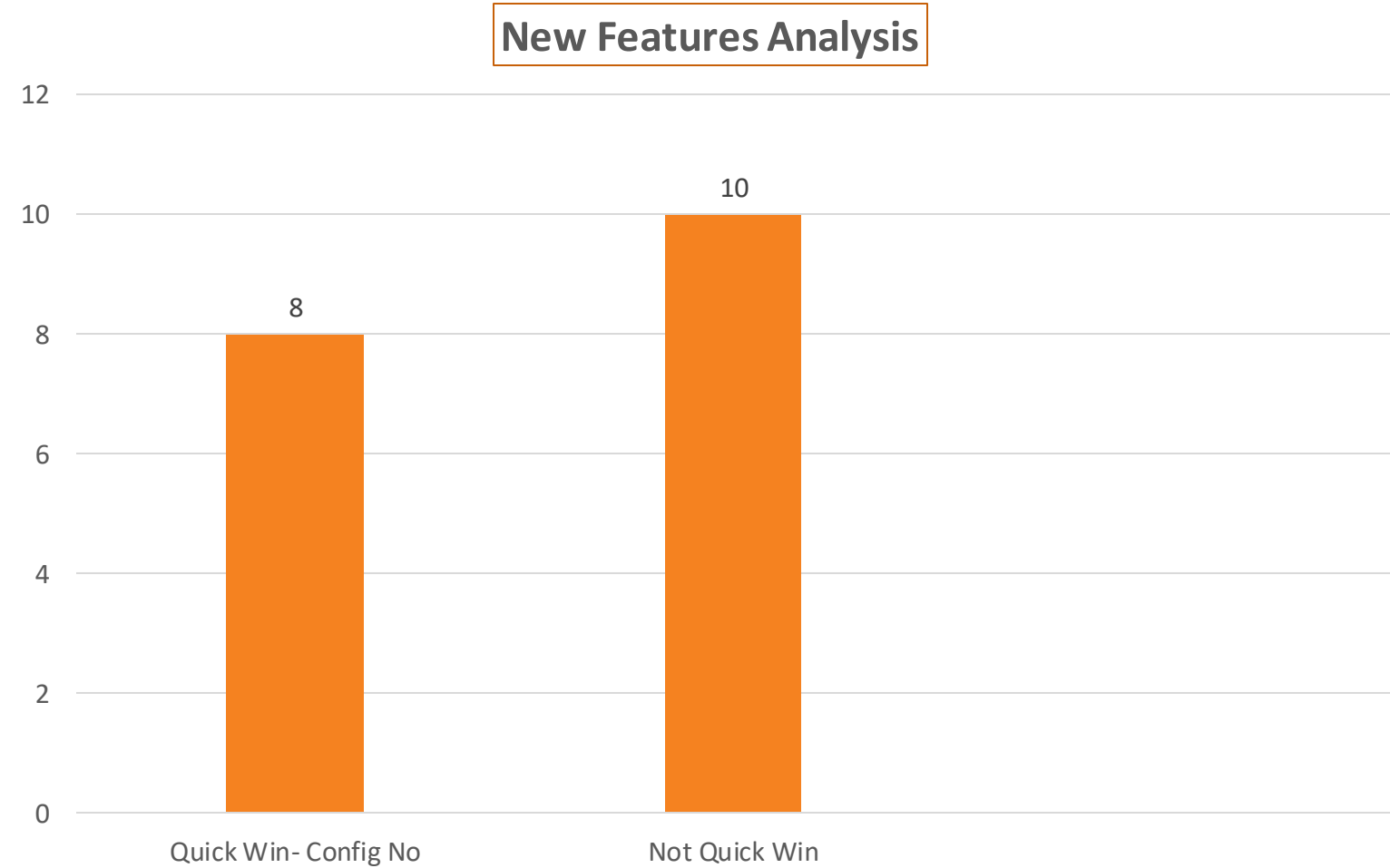
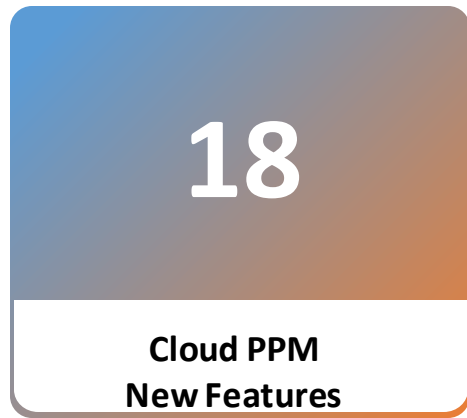
# How to read each Feature Summary?

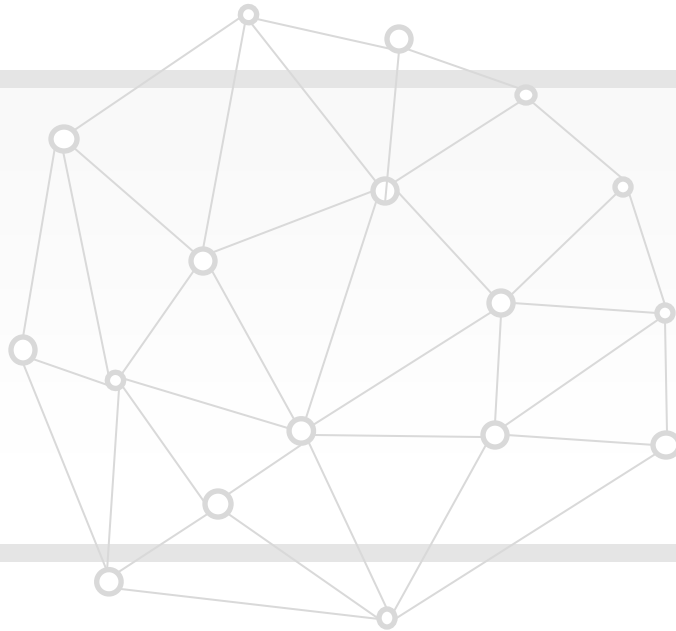




## Our Analysis of Latest Release New Features

# Evosys Analysis- Statistics





## New Features



## Quick Wins – Default with Configuration

Allow Access to View Project Cost Details from OTBI Reports:

Users with reporting access to project costs can now drill down to view project cost details from OTBI report.

Easier maintenance of labor rate schedules:

Person and job-based rate schedules now include a column for the Job Code on rate schedule lines.

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



# PROJECT BILLING : INVOICE SEARCH USING PROJECT NUMBER

## Details

Search for specific invoices using the project number as an alternative to project name.

Manage Invoices ?

Done

Search

AdvancedManage WatchlistSaved SearchRecent Invoices

\*\* At least one is required

\*\* Business Unit

Vision Operations

Contract Type

\*\* Contract Number

Billing Type

Number

Invoice Type

\*\* Status

Project Name

Cincinnati Healthcare

Project Number

Cincinnati Healthcare

\*\* Date

m/d/yy

\*\* Exception

LOC Number

Document Number

Search

Reset

Save...

Search Results

ActionsViewReview SF270Detach

Number	Exception	Contract Number	Bill-to Customer	Status	Date	Bill-Through Date	Amount in Invoice Currency	Receivables Number
1		Cincinnati Health C...	AT&T Universal Card	Draft	5/13/22	5/13/22	10,000.00 USD	

Invoice Distributions

Line 1: DetailsEligible Billing TransactionsUnbilled Transactions

Expenditure itemsEvents

ActionsViewDetach

Event Number	Project Name	Project Number	Task Name	Event Type	Description	Transaction Date	Invoice Amount in Invoice Currency (USD)	Contract Line Number
1	Cincinnati Healthcare	Cincinnati Healthcare		Invoice Milestone	Invoice Milestone	1/1/15	10,000.00	Line1
Total							10,000.00	

Approval History

Impact Analysis

Impact Level

Low

Need to Enable

NO

Configuration

NO

Quick Win

YES

## Business Benefits

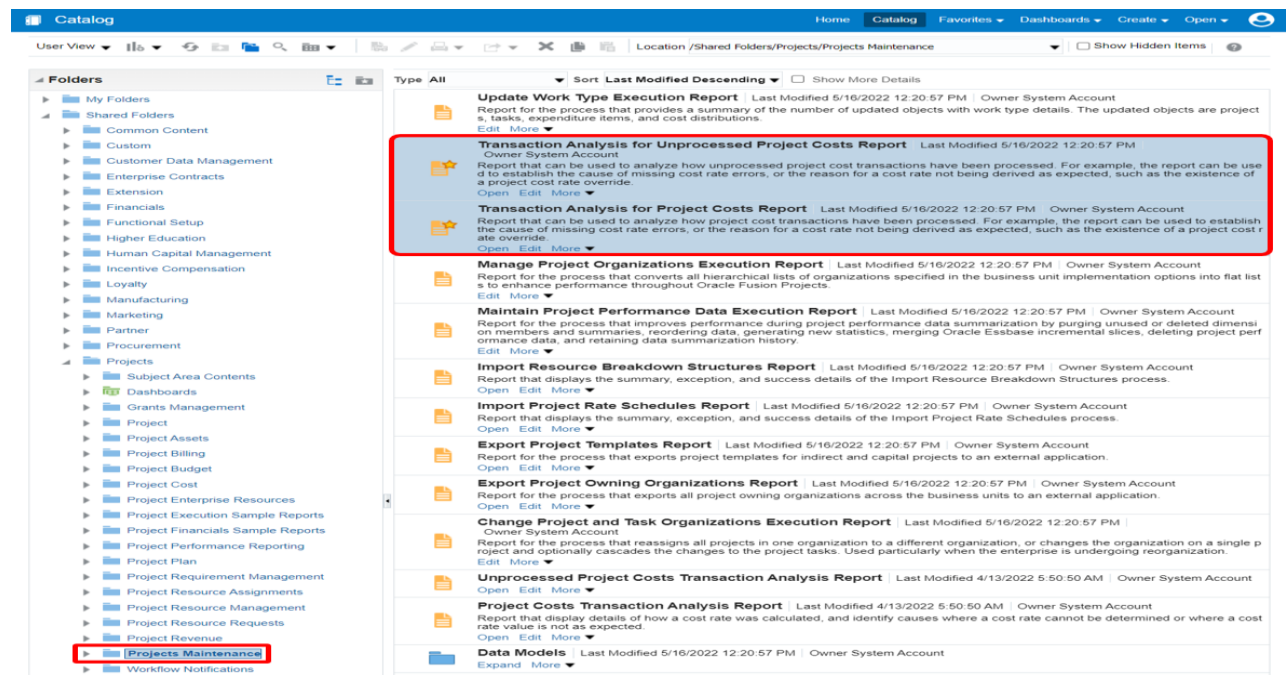
The business benefit of this feature is users can efficiently retrieve the project contract invoices based on the project number search field.



# PROJECT COSTING : PROJECT TRANSACTION ANALYSIS REPORTS

## Details

The new Project Transaction Analysis Reports to view the manner in which a cost rate was calculated for project cost transactions, and identify causes where a cost rate cannot be determined or where a cost rate value is not as expected.



## Impact Analysis

Impact Level Medium

Need to Enable NO

Configuration NO

Quick Win YES

## Business Benefits

- Empower your project application administrators and application implementation consultants to provide better support to project accountants and other users of the Costs work area.
- Project Transaction Analysis Reports will reduce the effort and skill required to resolve costing issues.



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# PROJECT PLANNING : PLANNING CURRENCY MODIFICATIONS FOR PLANNED RESOURCES IN THE FINANCIAL PROJECT PLAN

## Details

Modify the planning currency of planned resources on the financial project plan without having to delete and recreate the plan line. This simplifies planning updates for project managers.

### Impact Analysis

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

Actions ▾ View ▾       Resources All ▾

* Resource	Planning Currency	Start Date	Finish Date	Quantity		Planned	ITD Actual	Planned	Planned in Project Currency (USD)	Planned in Project Currency (L)
				Planned	ITD Actual					
CON600.Consultant: Labor ▾	USD ▾	7/1/22	9/30/22	243	Hours			7,290.00	7,290.00	7,2

Rows Selected 1 Columns Hidden 6 Columns Frozen 1

Save Save and Close Cancel

## Business Benefits

you can convert your planning data from a planned currency to another currency by simply flipping the currency on the financial project plan resource assignment. The application automatically converts the planning currency to the target currency using the conversion rate.



Details

Project status change workflow notifications are enhanced to better inform approvers and help them make faster decisions. For example, the notification now includes comments entered by the submitter, as well as the next status the project will be set to after approval.

Serial Approvers in a Single Workflow Task Instance

Sequence	Project Status	Workflow-Enabled?	Workflow Approver(s)
1	Draft		
2	Submitted	Yes	Project Manager > Financial Controller
3	Approved		

Single Approver in Serial Workflow Task Instances

Sequence	Project Status	Workflow-Enabled?	Workflow Approver(s)
1	Draft		
2	Submitted for Project Approval	Yes	Project Manager
3	Submitted for Finance Approval	Yes	Financial Controller
4	Approved		

Business Benefits

- Submitters of project status changes can now provide additional context
- The inclusion of the previous/current/next project statuses in the approval notification will help the approver understand the full lineage of the project status, and what the consequences of their approval action will be.
- Able to able to configure complex serial project status change approval requirements, better meeting the approval and reporting needs of end users.

Impact Analysis

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

# PROJECT RESOURCE : ENHANCED RESOURCE ASSIGNMENT UPDATE IN IMPORT PROJECT RESOURCE ASSIGNMENTS FBDI

## Details

Update one or more project resource assignments created from any source when Assignment External Reference is not present. The additional attributes resource, project, project role, and assignment start date exposed now will uniquely identify any assignment for the update. Additionally, you can choose to only submit or submit and approve the project resource assignment updates.

Manage Project Resource Assignments ?

Done

Search

Advanced Saved Search

Search Results

View Adjust Assignment Cancel Adjustment Update Assignments Detach

Resource	Assignment Name	Project Name	Project Role	Status	Assignment Start Date	Assignment Finish Date	Assignment Hours	Details	Adjust
George Right		ERP Upgrade	Team Member	Confirmed	5/1/22	5/31/22	Use project calendar		
Aleen Elina		ERP Upgrade	Oracle DBA	Confirmed	5/1/22	5/31/22	Use project calendar		
Aleen Elina		ERP Upgrade	Oracle DBA	Confirmed	6/1/22	6/30/22	Use project calendar		

Impact Analysis

Impact Level

Medium

Need to Enable

NO

Configuration

NO

Quick Win

YES

ProjectResourceAssignmentImportTemplate\_what's\_new

Project Resource Assignment Interface												
Resource Details				Project Details			Role Details		Assignment Date		Approve Assignment Updates	
Assignment External Reference	Resource ID	Resource HCM Person ID	Resource Name	Resource E-Mail	Project ID	Project Number	Project Name	Project Role ID	Project Role Name	Assignment Start Date	Operation*	New Start Date
EXT_REF_1		103948	George Right	George@oracle.com		2049485	ERP Upgrade		Oracle DBA	2022/05/01	Update assignment	2022/06/02
			Aleen Elina	Aleen@oracle.com			ERP Upgrade		Oracle DBA	2022/06/01	Update assignment	2022/07/10
							ERP Upgrade				Update assignment	2022/08/25

Instructions and CSV Generation

PJR\_RES\_ASMT\_CREATE

PJR\_RES\_ASMT\_UPDATE

## Business Benefits

- Increased process efficiency by performing bulk updates of assignments created from sources other than file-based import-export. The additional attributes provide greater flexibility to identify assignments with no Assignment External Reference.
- Increased control of the business process of schedule change approval.

Details

View detailed error information when importing award or award project details and the award number or project number is invalid. For example, the project number is invalid when importing the keywords or organization credit percentages for the award project.

Import Awards Report

Warnings		
Name	Message	User Details
GMS_INVALID_AWD_CHILD_OBJ GMS_INVALID_AWD_CHILD_OBJ	The value incorrectData for award isn't valid for the Award Funding object. The value incorrectData for award isn't valid for the Award Projects object.	You can add this data manually using the user interface and purge the record or if it's incorrect, purge the record. Use the 163656 request when purging the record. You can add this data manually using the user interface and purge the record or if it's incorrect, purge the record. Use the 163656 request when purging the record.

Processing Errors			
Line	Name	Message	User Details
1	GMS_INVALID_AWD_PRJ_CHILD_OBJ	The value incorrectData for project number isn't valid for the Award Project Keywords object.	
2	GMS_INVALID_AWD_PRJ_CHILD_OBJ	The value incorrectData for project number isn't valid for the Award Project Personnel object.	

Impact Analysis

Impact Level Medium

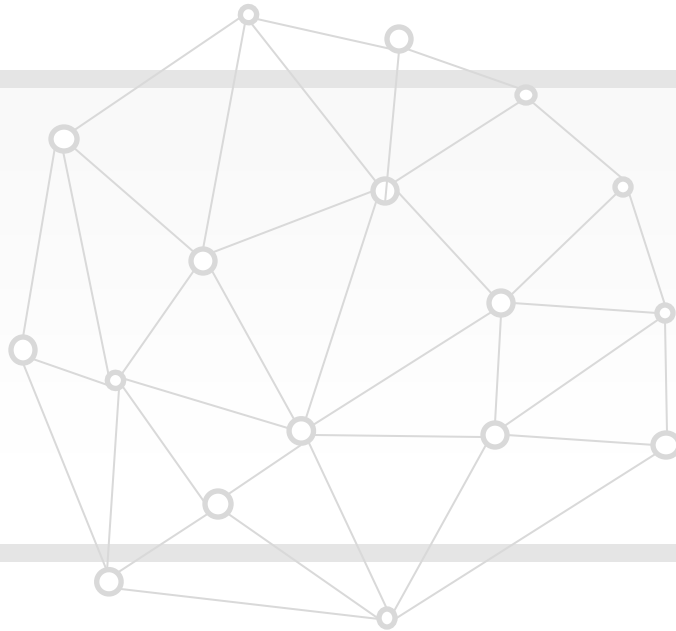
Need to Enable NO

Configuration NO

Quick Win YES

Business Benefits

- The business benefit of providing complete error or warning information when importing awards and related data is that there is no loss of data, especially when importing awards from other systems or when loading historical awards. Grants administrators can make informed decision to correct and re-import or ignore the award, thus managing award data efficiently..



New Features



Not Quick wins

Details

Define process configurators for invoicing using newly added sources that equate to existing sources available for use in revenue recognition. .

Configurator Sources

View

+

x

* Alias	* Name	Filter
CalculationLevelPlannedBurdenedCostInProjectFunctionalCurrency	Calculation Level Planned Burdened Cost in Project Functional Currency	
CalculationLevelLaborBurdenedCostInProjectFunctionalCurrencyITD	Calculation Level Labor Burdened Cost in Project Functional Currency - ITD	
CalculationLevelNonlaborBurdenedCostInProjectFunctionalCurrencyITD	Calculation Level Nonlabor Burdened Cost in Project Functional Currency - ITD	
CalculationLevelEventAmountInContractCurrencyITD	Calculation Level Event Amount in Contract Currency - ITD	"Event Type" = 'ITD Progress - Inv'
AssociatedProjectFundingAmountInContractCurrency	Associated Project Funding Amount in Contract Currency	

Configurator

Insert

Alias

()

Operator

\* Expression

(( ("CalculationLevelLaborBurdenedCostInProjectFunctionalCurrencyITD" + "CalculationLevelNonlaborBurdenedCostInProjectFunctionalCurrencyITD") / "CalculationLevelPlannedBurdenedCostInProjectFunctionalCurrency" ) \* "AssociatedProjectFundingAmountInContractCurrency" ) - "CalculationLevelEventAmountInContractCurrencyITD"

Validate

Impact Analysis

Impact Level

Medium

Need to Enable

NO

Configuration

YES

Quick Win

NO

Business Benefits

- The ability to define custom formulas when creating automatic billing events for invoicing.





## Details

Analyze program earned value using Oracle Transactional Business Intelligence, or OTBI, analyses. Earned value measures in the Program Performance Measures dimension of the Projects - Program Performance Reporting Real Time.

- Planned value
- Project complete (%)
- Earned value
- Earned value cost variance
- Cost performance index
- Earned value schedule variance
- Schedule performance index

### Impact Analysis

Impact Level	Medium
Need to Enable	NO
Configuration	NO
Quick Win	No

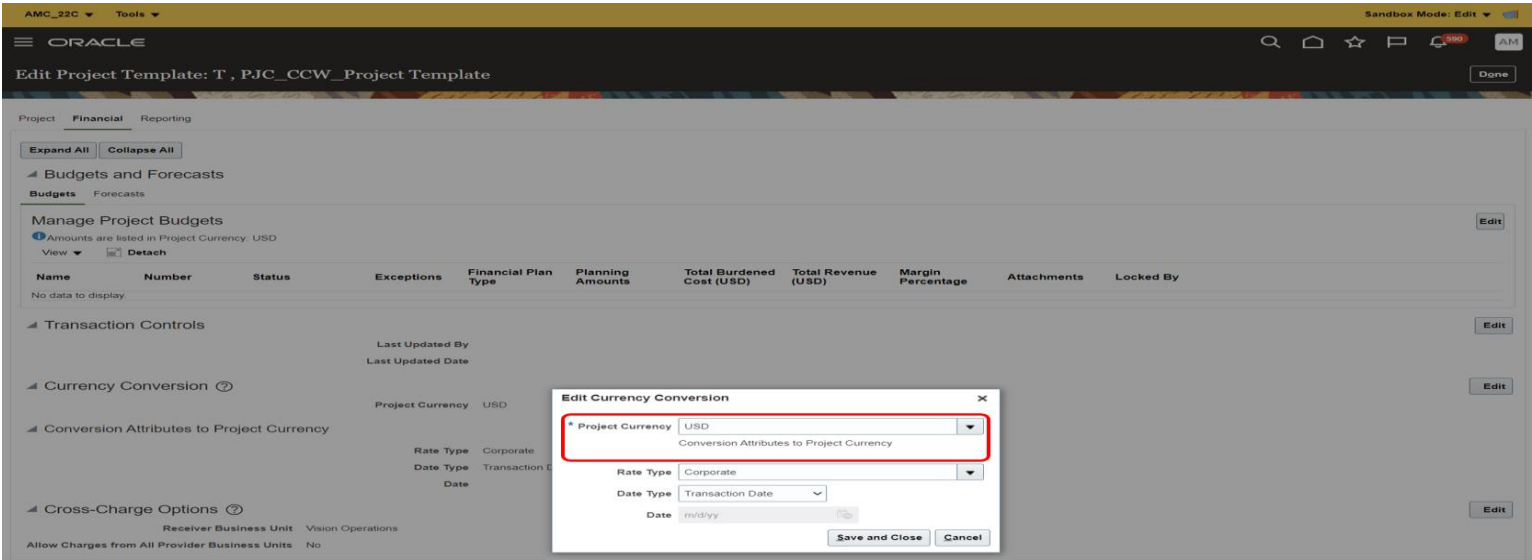
## Business Benefits

- The business benefit of using this feature is the ability of program managers and stakeholders to monitor earned value measures in program analyses. Earned value measures reflect the current level of work achieved against the plan. Timely earned value analyses can help identify projects that need attention to get back on schedule and budget.



Details

- Use context specific attributes in Page Composer, such as Project Type or whether the project is a template, to control properties of components in the Manage Project Financial Settings page.



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

Business Benefits

- Project application administrators can personalize components within the Manage Project Financial Settings page to better meet the needs of their end users.



Details

Transfer project cost transactions using the Project Costs REST API, adding to the list of adjustment types that are already available.

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

Business Benefits

- System integrators, administrators, and developers can create new or extend existing integration and automation solutions for managing project costs.
- Additional control has been provided by extending workflow approvals for project cost adjustments to the REST API.
- Customers can also leverage complementary offerings such as the Oracle Visual Builder Add-in for Excel to create user-friendly workbooks to perform these operations

# PROJECT PLANNING : MAINTAIN PLAN LINES USER SPREAD WHEN CHANGING PLAN LINE DATES

## Details

Maintain manual periodic spread for financial project plan and budget lines even if the duration changes due to a scope change. Similarly, maintain manual periodic spread for financial project plan using the Financial Project Plan REST API and maintain manual periodic spread for budget lines using Project Budgets REST API.

	From Date	To Date	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Total Quantity	Spread Curve
User Specified Periodic Spread	1-Sep-2021	31-Dec-2021	11	12	8	9	NA	40	Prorated Even
User Periodic Spread Post Date Changes Retained (with option selected)	1-Sep-2021	31-Jan-2022	11	12	8	9		40	Prorated Even
User Periodic Spread Post Date Changes Not Retained (without option selected)	1-Sep-2021	31-Jan-2022	8	8	8	8	8	40	Prorated Even

## Impact Analysis

Impact Level

Medium

Need to Enable

NO

Configuration

YES

Quick Win

NO

## Business Benefits

The flexibility to retain the manual periodic spread and add additional periods on financial project plan and budget lines date changes when scope changes.



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Details

Manage project progress such as refresh actual amounts or revise the progress as of date using the Project Progress REST API. Maintain notes, additional information, and attachments on the draft project progress using this REST API.

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

Business Benefits

Manage the financial progress by revising the progress as of date and also refresh the project costs. You can also provide context to the project's draft progress, useful when generating a forecast during publishing of the progress, by adding a narrative that includes attachments, notes, and additional information.



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## Details

Manage planning options for project budgets using the Project Budgets REST API. Override the default planning options defined from the financial plan type while creating a project budget using the Project Budgets REST API. This override facility better aligns to the user experience available to users in the user interface.

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

## Business Benefits

Project Budgets REST API is that you can now view and manage the planning options for existing project budget versions.

### Details

Update and delete project team members using the Project Templates REST API. This allows the quick update and maintenance of project templates, for example when project team members change.

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

### Business Benefits

- System integrators, administrators, and developers can create new or extend existing integration and automation solutions for maintaining project templates.
- Users such as the Project Application Administrator can efficiently bulk-update or delete team members across project templates. Customers can also leverage complementary offerings such as the Oracle Visual Builder Add-in for Excel to create user-friendly workbooks to perform these operations.
- Where high numbers of project templates are defined, this capability saves time and effort over row-wise updates in the UI.

Details

Manage assignment details including dates, roles, and status for all individual resources on the request using the Project Resource Request REST API. In addition, update assignment status, dates, or role when requesting for assignment approval for a nominated resource using Project Plan Resource Requests REST API.

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

Business Benefits

- you can easily create and update assignment details for all individual resources on a request. You can use these additional REST API methods for integration solutions using Project Resource Request REST API and Project Plan Resource Request REST API.



# GRANT MANAGEMENT: FIND SPONSORED PROJECTS USING THE LIST OF VALUES FOR PROJECTS API

## Details

Limit results of the List of Values for Projects REST API to sponsored projects. This provides the ability to show just sponsored projects for customers using awards as part of Grant Management.

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

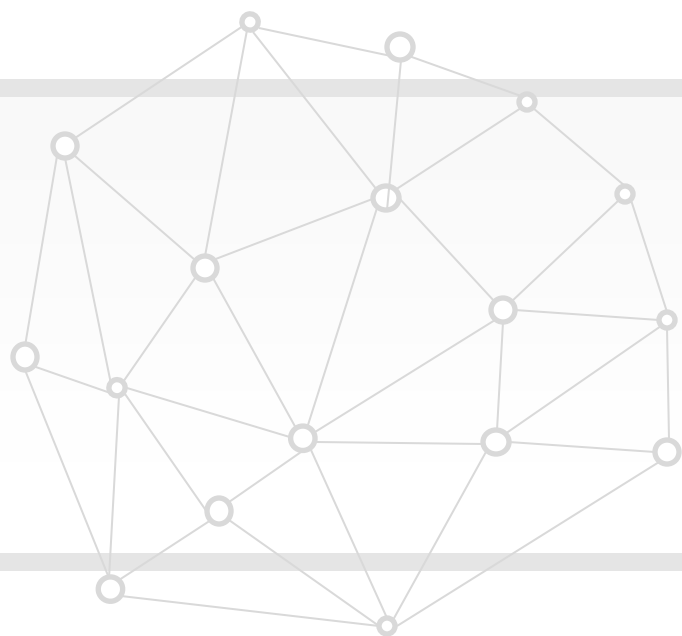
## Business Benefits

- The business benefit of this feature is that it provides more efficient access to and selection of sponsored projects.



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# Closing

## Q&A

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# Closing Note

- 1. What happens next?
  - 1. Presentation
  - 2. Session Recording
- 2. Feedback Form
- 3. Speak with your Project Manager or [business@evosysglobal.com](mailto:business@evosysglobal.com)
  - 1. for additional services around quarterly updates
  - 2. Learn more about Innovation
- 4. Next Sessions ?

Benefits and Compensation	13 July 2022	60 minutes
	3:00 PM GMT   4:00 PM CEST   10:00 AM EST	
Project Portfolio Management (PPM)	13 July 2022	60 minutes
	4:30 PM GMT   5:30 PM CEST   11:30 AM EST	

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It is always best to clear your doubts

**Thank You!**

## Contact Us

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 +44 2080043670  [www.evosysglobal.com](http://www.evosysglobal.com)  [business@evosysglobal.com](mailto:business@evosysglobal.com)