

Functional Impact Document

Projects Module

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Release 14.2.0.2 (24 May 2023)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

General

- Improved messaging for missing Oracle privileges.
- Improved messaging to handle when a session expires.

Financial Projects Integrator

The format of the uploaded Team Member Name value now aligns with the downloaded value. You can utilize the downloaded Team Member Name value to generate new Team Members, eliminating the previous requirement of having the uploaded Team Member Name in the format [Last Name], [First Name].

You must reinstall the BI reports for Projects to use this version. Please refer to the installation guid [here](#) for more information.

Release 14.1.0.2 (18 Apr 2023)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

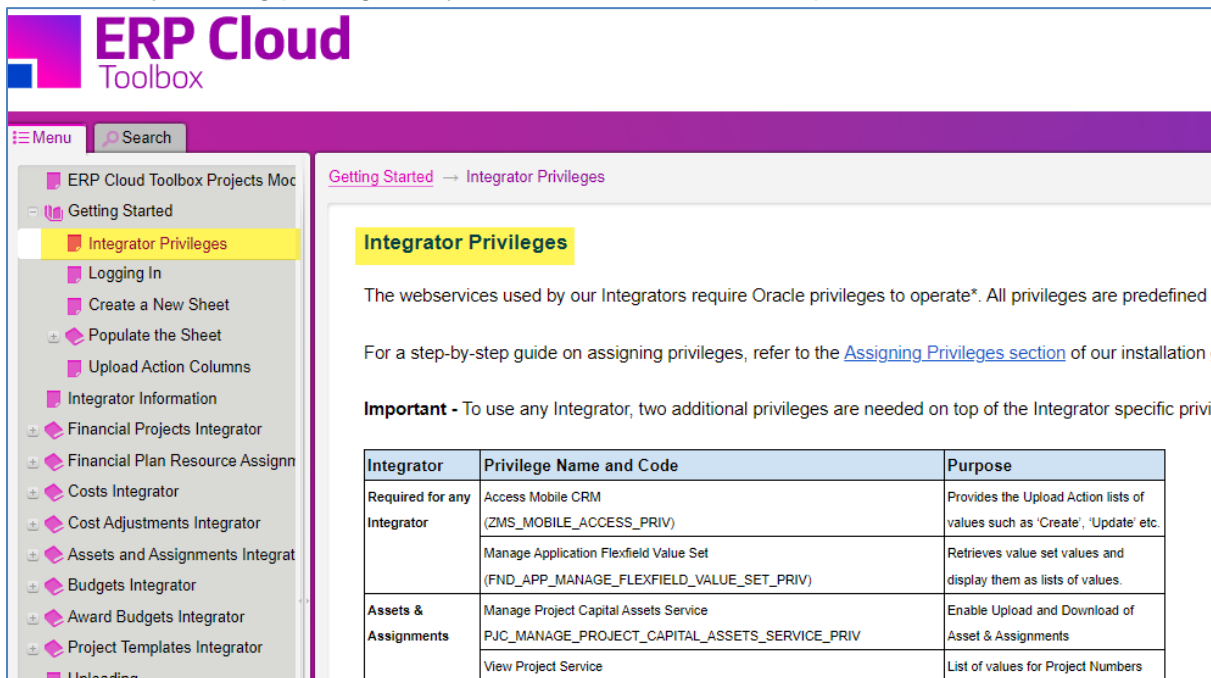
Project Templates Integrator

Added a new 'Project Templates' Integrator to the Projects Module. The following functionalities are available:

- Create and Download Project Templates Header
- Create, Download, Update and Delete Classifications
- Create, Download, Update and Delete Tasks
- Create and Download Project Transaction Controls
- Create and Download Task Transaction Controls
- Create and Download Quick Entries

Integrator Privileges

We have revised the list of Integrator privileges for the Projects Module. Please review these and add any missing privileges to your role. To review the list, please click [here](#).



ERP Cloud Toolbox

Getting Started → Integrator Privileges

Integrator Privileges

The webservices used by our Integrators require Oracle privileges to operate*. All privileges are predefined.

For a step-by-step guide on assigning privileges, refer to the [Assigning Privileges section](#) of our installation.

Important - To use any Integrator, two additional privileges are needed on top of the Integrator specific privi

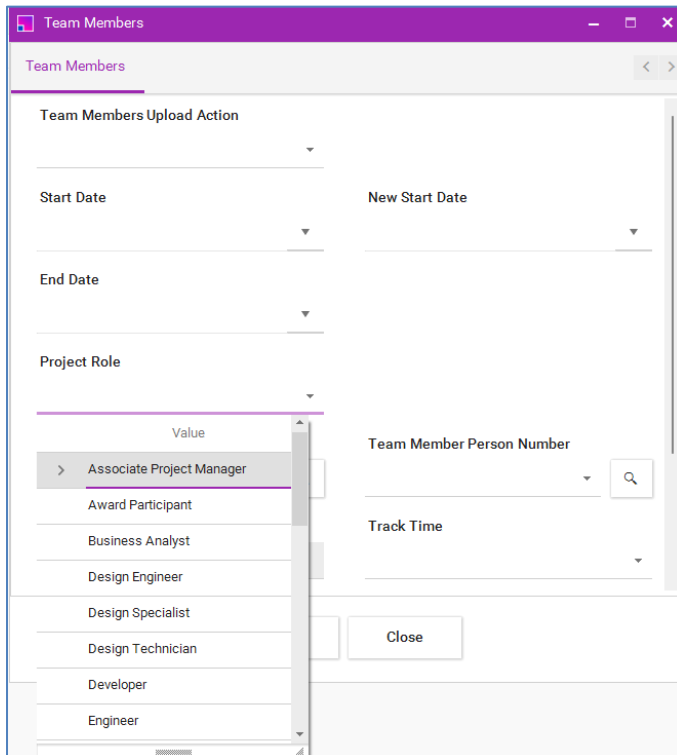
Integrator	Privilege Name and Code	Purpose
Required for any Integrator	Access Mobile CRM (ZMS_MOBILE_ACCESS_PRIV)	Provides the Upload Action lists of values such as 'Create', 'Update' etc.
	Manage Application Flexfield Value Set (FND_APP_MANAGE_FLEXFIELD_VALUE_SET_PRIV)	Retrieves value set values and display them as lists of values.
Assets & Assignments	Manage Project Capital Assets Service (PJC_MANAGE_PROJECT_CAPITAL_ASSETS_SERVICE_PRIV)	Enable Upload and Download of Asset & Assignments
	View Project Service	List of values for Project Numbers

Release 14.0.1.5 (27 Mar 2023)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

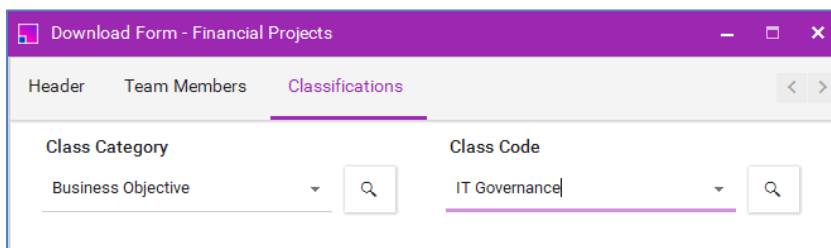
Financial Projects Integrator

Project Role List of Values on the Team Members Data Form is now a short list – you no longer need to search for the values to appear.



The screenshot shows the 'Team Members' data form. The 'Project Role' dropdown menu is open, displaying a list of roles: Associate Project Manager, Award Participant, Business Analyst, Design Engineer, Design Specialist, Design Technician, Developer, and Engineer. The 'Associate Project Manager' role is highlighted. Other fields on the form include 'Team Members Upload Action', 'Start Date', 'New Start Date', 'End Date', 'Team Member Person Number', and 'Track Time'. A 'Close' button is visible at the bottom right of the form.

Added Class Code to the Download Form under the Classifications tab:



The screenshot shows the 'Download Form - Financial Projects' with the 'Classifications' tab selected. The 'Class Category' dropdown menu is set to 'Business Objective' and the 'Class Code' dropdown menu is set to 'IT Governance'. Both dropdown menus have search icons next to them.

Release 14.0.1.2 (14 Mar 2023)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Add new columns to the Financial Projects Integrator:

- Header section
 - Burden Schedule
 - Burden Schedule Fixed Date
- Tasks section
 - Task Burden Schedule



Release 14.0.0.0 (09 Mar 2023)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

- Updated ERP Cloud Toolbox to 14.0.3.0
- Added a new Machine-level installation option.
- Fixed an issue where entering an invalid instance URL in the Login form would cause a circular redirect error.
- Security Update: Updated libraries to the latest patch versions



Release 13.4.1.2 (08 Mar 2023)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

- Bug fixes

Release 13.4.1.0 (26 Jan 2023)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

- Security Update: Updated libraries to the latest patch versions.
- Updated ERP Cloud Toolbox to 13.10.0.0. Resolved an issue preventing the login form from opening.

Release 13.3.5.2 (21 Dec 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

- Added support for NTLM Proxy Authentication
- Resolved an issue where upload errors were printing to the wrong rows.

Financial Projects Integrator

Removed reliance on REST web service for Project Templates to build the List of Values (LOVs) for 'Source Template Name' field in the integrator. BI Report is now used to build the LOVs. We recommend that you remove the privilege **Manage Project Template (PJF_MANAGE_PROJECT_TEMPLATE_PRIV)** from users who do not have roles that give them access in the Oracle User Interface / Front-End to manage project templates.

Release 13.3.4.7 (21 Nov 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

- Resolved a login error that occurs when logging in to 22D instances.
- Resolved an issue on login incorrectly prompting for client certificates.
- Fixed issue where child Upload Actions were not defaulted when "Create records" or "Update records" was entered at Header level.

General

New Action values

New Upload Actions 'Create records' and 'Update records' have been added to the Financial Projects, Budgets, Award Budgets and Financial Plan Resource Assignments Integrators. By specifying 'Create records', the Integrator will default the same value to any lower sections associated to the row where the value was provided. E.g., Enter Create records at the Header level and it will cascade to Classifications, Team Members and Tasks. Saving you from entering 'Create' at all those levels.

Full details can be found in the user guide [here](#).

Release 13.3.3.0 (07 Nov 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added a new section 'Provider Business Units' to the Financial Projects Integrator. Functionality to Create and Delete Provider Business Units is only available from Oracle Cloud version 22D. If you are on a lower version of Oracle Cloud, please delete the section from the sheet, otherwise, the integrator will not work properly.

▼ ▼			Provider Business Units		
Project Name	Project Number	Proj Allow Cross Charge Flag	Provider Business Units Message	Provider Business Units Upload Act	Provider Business Unit Name
WT Project 5	WTP005	Yes		Delete	France Business Unit
					Progress US Business Unit
					Healthcare US Business Unit
WT Project 6	WTP006	No		Delete	UK Business Unit
					Progress US Business Unit
					Healthcare US Business Unit
				Create	Supremo US Business Unit

Release 13.3.1.4 (03 Nov 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Budgets Integrator

Added a new 'Budgets' Integrator to the Projects Module. This is a merged version of the two integrators, Non-Phased Budgets and Period-Phased Budgets. The following functionalities are available:

- Create, download, update, and delete Budget Version Header
- Create, download, and delete Planning Resources
- Create and download Plan Lines with Planning Amount Details
- Baseline a budget at the same time as creating it

Non-Phased Budgets and Period-Phased Budgets Integrators have been removed from The Projects Module.

Release 13.3.0.5 (25 Oct 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added a column in the Team Members section called 'Team Member Person Number'. Team Member Person Number is required to handle duplicate Team Member names. When there is a duplicate Team Member name, you will be required to specify the Person Number when creating a new Team Member. 'Team Member Person Number' will not be downloaded. It is only for the Create upload action. If the Team Member name is not a duplicate 'Team Member Person Number' will be automatically populated for uploading.

Team Members									
Team Members	Messages	Team Members Upload Action	Start Date	New Start Date	End Date	Project Role	Team Member Name	Team Member Person Number	Team Member Email
			21/03/2022			Project Ma	Wai Thant-Cyn		Wai.M4A@M4A.cc
			21/06/2022			Team Men	Jenny Chin		jenny.chin_etaq-de
	Create		25/06/2022			Team Men	Brooks, Steven	5281	steven.brooks_eta
	Create		25/06/2022			Team Men	Marlin, Amy	2	amy.marlin_etaq-c

Release 13.3.0.2 (01 Oct 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added a new section 'Customers' to the Financial Projects Integrator. Create and Delete upload actions are available for this section.

▼		Customers			
Project Name	Project Number	Customers Messages	Customers Upload Action	Party Name	Party Number
WTPERF250322-36	102213		Delete	ABC Application Software	26360
			Create	SharpSpring Fitness Center	668533
			Create	Specialty Distribution	55110
			Create	Stark Industries	80010

Release 13.2.2.0 (21 Sep 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added a new Upload Action 'Delete' for Classifications, Team Members and Tasks.

Classifications				
Classifications	Messages	Classifications Upload Action	Class Category	Class Code
		Delete	Business Objective	Training
		Delete	Business Objective	Business Grov
		Delete	Business Objective	Capital Spend
			Business Objective	IT Governance

Team Members						
Team Members	Messages	Team Members Upload Action	Start Date	New Start Date	End Date	Project Role
		Delete	21/03/2022			Project Mar Wai Thant-Cyn
		Delete	21/06/2022		22/06/2022	Team Mem Jenny Chin
		Delete	22/06/2022		23/06/2022	Team Mem Pablo Pérez
			23/06/2022			Team Mem Jenny Chin

Tasks			
Tasks	Messages	Task Upload Action	Task Number
		Delete	WTP001
		Delete	WTP001
			2
			2.1
			2.2
			2.3

Release 13.2.1.4 (07 Sep 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Costs Integrator

Added a new column 'Unmatched Negative Trans'. Set the column value to 'Yes' if the unprocessed cost is an unmatched negative transaction.

Optional Columns		
Billable	Capitalizable	Unmatched Negative Trans
		Yes

Release 13.2.1.3 (05 Sep 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Cost Adjustments Integrator

Added a new Adjustment Type of 'Transfer'. For more information about how to use this new Adjustment Type, please refer to the [Projects Module User Guide](#).

Adjustments				Transfer Details					Batch Details				
Adjustments Messages	Adjustments Upload Action	Transaction Number	Adjustment Type	New Project Number	New Task Number	New Contract Number	New Funding Source Name	New Expenditure Type	Expenditure Batch	Project Number	Task Number	Expenditure Type	Quantity
Create		374238	Transfer	WTP001	2.3			Airfare	WTBatch110522-1	102209	2.2	Contract Service	5
Create		374240	Transfer	WTP001	2.3			Airfare	WTBatch110522-1	102209	2.2	Contract Service	7
Create		374242	Transfer	WTP001	2.3			Airfare	WTBatch110522-1	102209	2.2	Contract Service	9
Create		374244	Transfer	WTP001	2.3			Airfare	WTBatch110522-1	102209	2.2	Contract Service	11

Release 13.1.8.3 (18 Jul 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Award Budgets Integrator

Added a new 'Award Budgets' Integrator to the Projects Module. The following functionalities are available:

- Create, download, update, and delete Award Budget Version Header
- Create, download, and delete Planning Resources
- Create and download Plan Lines with Planning Amount Details
- Baseline a budget at the same time as creating it

Costs Integrator

Change column name 'Accrual Batch' to 'Accrual Item'.

Financial Projects Integrator

Added a new section 'Project Attachments'. You can use the tool to upload documents to the Project Header.

Project Attachments								
Project Attachments Messages	Project Attachment Upload Action	Project Attachment Type	Project Attachment Title	Project Attachment Category	Project Attachment Description	Project Attachment File Path	Project Attachment URL	Project Attachment Text Content

Release 13.1.6.10 (09 Jun 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Plan Resource Assignments Integrator

Added a new 'Financial Plan Resource Assignments' Integrator to the Projects Module. The following functionalities are available:

- Ability to Create, Update, and Delete Resource Assignments against Financial Project Plan Tasks

Financial Projects Integrator

Added a new column 'Proj Allow Cross Charge Flag' to the Project Header section of the Integrator. You can use this column to set the flag to either 'Yes' or 'No'.

Release 13.1.5.5 (13 May 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Cost Adjustments Integrator

Added a new 'Cost Adjustments' Integrator to the Projects Module. The following functionalities are available:

- Ability to Download existing Project Costs (Processed Costs)
- Ability to Create Cost Adjustments to existing Project Costs

Costs Integrator

Removed the following section from the Costs Integrator:

- Adjustments – please use the Cost Adjustments Integrator to carry out adjustments

Release 13.1.4.11 (13 Apr 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Budgets - Period-Phased Integrator

Added 'Budgets - Period-Phased' Integrator to the Projects Module. The following functionalities are available:

- Ability to Create, Download, Update and Delete Period-Phased Budget Versions
- Ability to Create and Delete Planning Resources
- Ability to Create Plan Lines with Planning Amount Details
- Ability to Baseline a budget at the same time as creating it

Costs Integrator

Added the following columns to the Costs Integrator:

- Burdened Cost
- Provider Ledger Raw Cost
- Provider Ledger Burdened Cost
- Burdened Cost Debit Account
- Burdened Cost Credit Account

Release 13.1.3.0 (21 Mar 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Costs Integrator

Added four new Adjustment Types to the Costs Integrator:

- Set to capitalizable
- Set to noncapitalizable
- Set to billable
- Set to nonbillable

Adjustments		
Adjustments Messages	Adjustments Upload Action	Adjustment Type
	Create	Set to capitalizable
	Create	Set to noncapitalizable
	Create	Set to billable
	Create	Set to nonbillable

Release 13.1.2.0 (25 Feb 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added a new section 'Baseline' to set the Project Plan to Baseline, create a Budget Version and Baseline that budget.

Baseline			
Baseline Messages	Baseline Project	Plan Type	Baseline Budget
	Yes	Approved Cost Budget	Yes

Release 13.1.1.9 (08 Feb 2022)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Budgets - Non-Phased Integrator

Added 'Budgets - Non-Phased' Integrator to the Projects Module. The following functionalities are available:

- Ability to Create, Download and Update Non-Phased Budget Versions, Planning Resources and Plan Lines
- Ability to Delete Non-Phased Budget Versions and Planning Resources
- Ability to Baseline a budget at the same time as creating it

Release 13.0.0.11 (09 Dec 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added the following functionalities to the Financial Projects Integrator:

- Ability to download projects by Source Project Template using the Download Form
- Option to have either Project Name or Project Number on the sheet, not just Project Name.

Costs Integrator

Added the following functionalities to the Cost Integrator:

- Ability to reverse existing Project Costs with an addition of the Adjustments section. Currently, only the Adjustment Type of 'Reverse' is supported in the tool.



Release 13.0.0.7 (25 Nov 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Bug fixes.

Release 12.0.4.9 (18 Nov 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added the following functionalities to the Financial Projects Integrator:

- Ability to download projects by Team Members using the Download Form
- Ability to download projects by Class Category using the Download Form

Release 12.0.3.3 (04 Nov 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Projects Module

The display of DFF columns has been modified so that only the attribute columns that are enabled in Oracle are displayed on the sheet.

Costs Integrator

Added the following functionalities to the Costs Integrator:

- Submit: ability to submit the Import Costs process to process the unprocessed costs
- Secondary Download Source: ability to download either the unprocessed costs or the processed project costs

For more information about the new functionalities, please refer to the [User Guide](#).



Release 12.0.2.0 (06 Oct 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Projects Module

Upgraded cloud Add-in to fix issues where DFF attribute number columns could not be uploaded when a value set was applied.



Release 12.0.0.5 (23 Sep 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Projects Module

Upgraded cloud Add-in to allow for Download Sources to be implemented.

Added language compliance across all the integrators supporting BI reports and defaulting values.



Release 11.1.2.16 (03 August 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Assets and Assignments Integrator

Added the Assets and Assignments Integrator to the Projects Module. The functionalities include:

- Create, Update and Delete Project Assets
- Create and Delete Asset Assignments

Release 11.0.0.0 (21 July 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

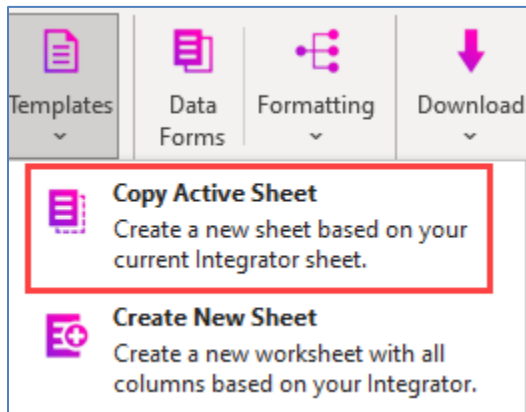
Financial Projects Integrator

The following changes are included in this release:

- Create, Update, and Delete Transaction Controls at Project and Task Level

Projects Module

- The display of DFF columns has been modified. In earlier versions, DFF columns displayed the first and last column for each DFF data type (Character, Number, Date, and Timestamp). The integrator will now display all DFF columns which for some sections was 80+ columns. You can simply delete the unwanted DFF columns and keep the columns you require on the sheet. Templates provide an option for you to copy the current sheet so once you have deleted the columns you don't need to do it again next time you create a new sheet if you use this option.
- Templates have been implemented in this release. Click [here](#) for more information about Templates.





Release 10.4.0.3 (28 June 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

The following changes are included in this release:

- Download Projects by Team Member and Project Role using the Download Form

Release 10.1.5.1 (18 June 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Costs Integrator

Added the Costs Integrator to the Projects Module. The functionalities include:

- Create and Delete Unprocessed Project Costs
- Perform mass creation of transactions to be processed
- Use the Refresh functionality to update the status of the transactions on the sheet after running the Oracle Import Costs process
- Perform mass deletion of transactions that have been rejected by the Oracle Import Costs process
- Refresh the sheet with the results from the Import Costs process

Release 9.0.6.0 (28 April 2021)

The following includes details of the incremental fixes, functionality changes, and or additions to the Module as part of its development and release process.

Financial Projects Integrator

Added Financial Projects Integrator to the Projects Module. The functionalities include:

- Create and Update Financial Project information including the Project Header, Team Members, Classifications, and Tasks from Excel
- Perform mass updates to single or multiple projects
- Modify details such as end-dates as quickly as you can copy and paste
- Have greater visibility across the entire project with all sections visible in one place