
WHO CHANGED MY PROJECT CLASSIFICATION

Tracking Changes of Classifications in Oracle Projects

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Who Changed My Project Classifications

Tracking Changes of Project Classifications in Oracle Projects

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Executive Summary

This document discusses a tool that tracks changes to Project Classifications, Class Categories and Class Codes, on a project in Oracle Projects.

Standard functionality does not track or report changes, deletions or additions to the Project Classifications in Oracle. This can cause concern as these attributes are used for reporting, project management, account generation (subledger accounting / auto accounting) and other specific business purposes. Legitimate changes can require tracking and reporting for audit, regulatory agencies as well as for management reporting. Accidental changes can cause concern as the users spend time determining the original or accurate value to correct the mistake.

A tool exists that can track when a Project Classification was added, changed or deleted. This method stores the user that made the change as well as the time and date the change occurred. The data can be reported online by each specific project. An option also exists to query across projects to validate system wide changes. Also a report is available to produce a hard copy output of the changes.

Organizations that have used this method have improved project reporting, streamlined project auditing, identified and corrected accounting issues related to Classification inaccuracies.

This tool is ideal for any organization that use Project Classifications for:

- Regulatory Reporting
- Accounting
- Management Reporting
- Audit Requirements
- Sorting or Consolidating Projects
- Project Cost Allocations
- Capital Interest Generation
- Various other Business Requirements

Introduction

The Project Classification feature in Oracle Projects includes the Class Category and Class Code. Classifications can be changed, deleted or altered during a project. Most Oracle Project related organizations use these values for various reasons. These include, reporting, accounting, project sorting, and other specific requirements. These values are stored at the header level of the project.

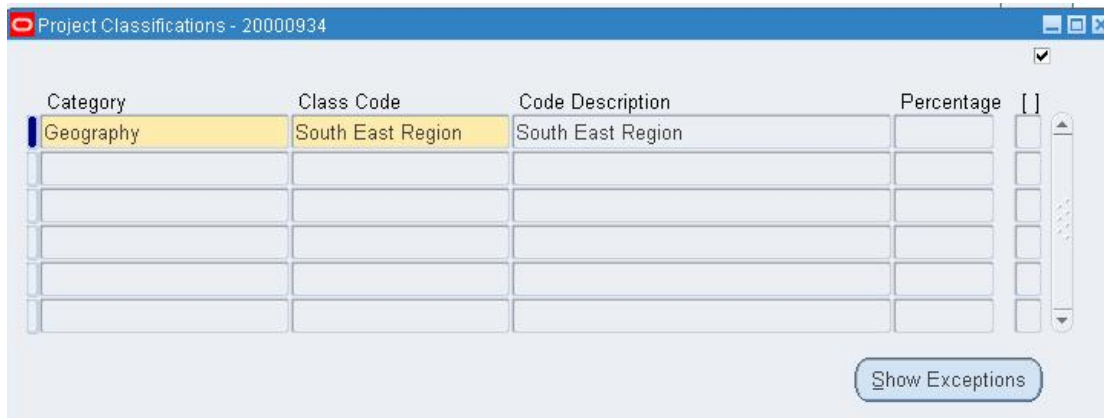
Image of Project Classification Configuration Screen

Name	Description	Effective Dates		[]
		From	To	
Central Region	Central Region	11-MAY-2015		
North East Region	North East Region	01-JAN-2000		
North West Region	North West Region	11-MAY-2015		
South East Region	South East Region	11-MAY-2015		
South Region	South Region	11-MAY-2015		
South West Region	South West Region	11-MAY-2015		

The Problem

Oracle does not provide a standard “out-of-the-box” mechanism to track any changes to the Project Classifications on a project. Changes can include, additions, deletions or changing a current value. This provides challenges as these values can be used to determine account codes, provide project reporting, sort projects as well as other features. Changes to the value can misrepresent the data or cause inaccuracies. Lacking a tool to determine the change to the value can cause confusion to those analyzing the data and question project data accuracy.

The following is an example of a project with an existing classification:

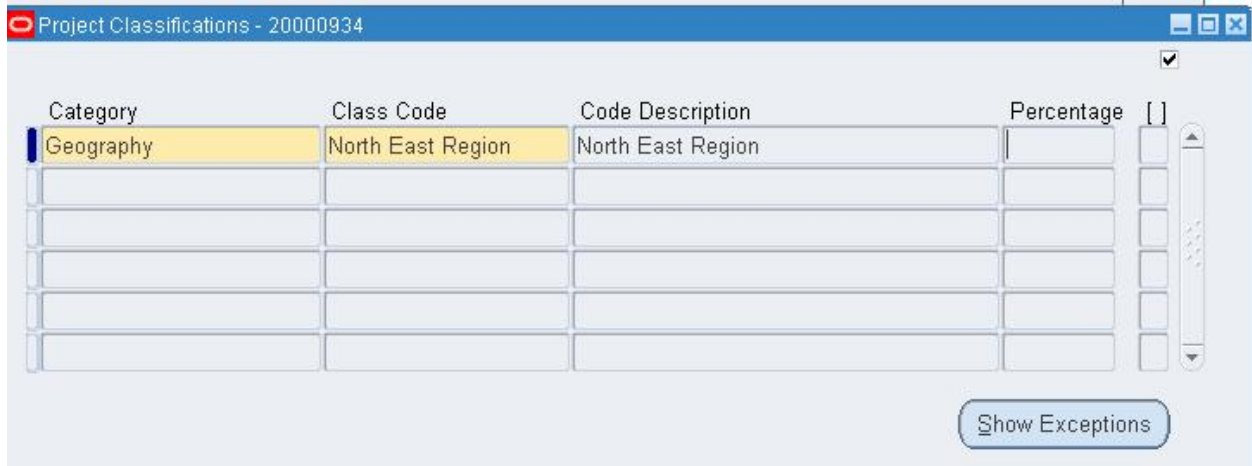


The screenshot shows a window titled "Project Classifications - 20000934". It contains a table with the following data:

Category	Class Code	Code Description	Percentage
Geography	South East Region	South East Region	

At the bottom right of the window, there is a button labeled "Show Exceptions".

If a user changes the class code there is no standard mechanism to determine the previous value.

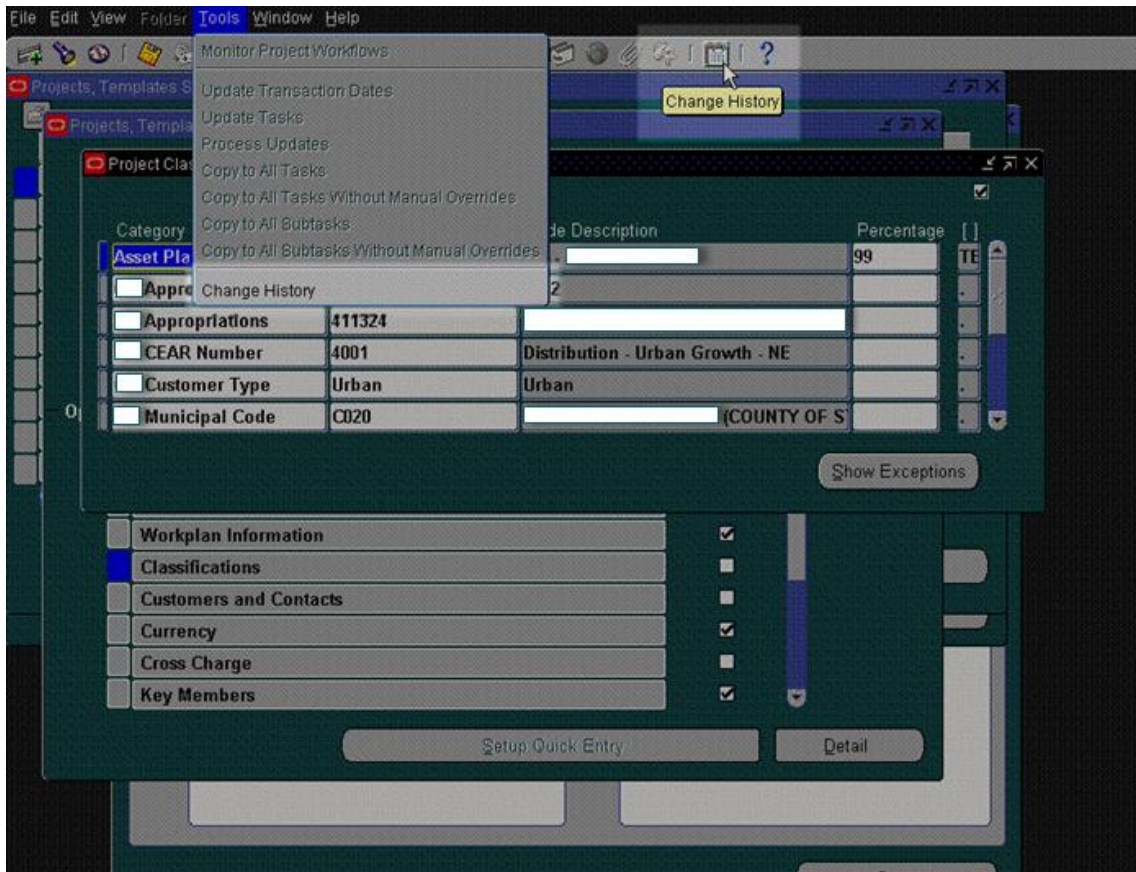


Solution – Quantas Classification Tracker

The Quantas Classification Tracker provides the ability to track all changes to the classifications on a project. The tool has two (2) main features. The first is to track all activity which includes adding, changing or deleting the values related to the Project Classifications. The second feature is to allow the user to report these changes. The reporting can be done by each project, through a query screen as well as a report.

Project Classification Change History

The Project Change History feature will display any changes performed on a specific project. This allows a user to choose a project and see what changes may have occurred. A Change History icon is available as well as Change History option under the Tools menu.



Once selected the historical information is displayed. The current and historical data will be displayed for the Class Categories. To view the Class Code changes the user will select the Full History button at the bottom of the screen.

Project Number	Class Category	Effective From	Effective To	Changed By	Changed Fields	Effective	Deleted By
51024	Asset Plant	25-OCT-2012 11:31:48		SYSADMIN	Attribute1, Record Version Number	<input checked="" type="checkbox"/>	
56004	Asset Plant	22-OCT-2012 12:37:45	25-OCT-2012 11:31:47	SYSADMIN	Code Percentage, Record Version Number	<input type="checkbox"/>	
56004	Asset Plant	19-DEC-2011 11:13:26	22-OCT-2012 12:37:44			<input type="checkbox"/>	
56004	Appropriation Year	22-OCT-2012 12:37:38		SYSADMIN	Class Code, Record Version Number	<input type="checkbox"/>	
56004	Appropriation Year	22-OCT-2012 12:37:30	22-OCT-2012 12:37:37	SYSADMIN	Class Code, Record Version Number	<input type="checkbox"/>	
56004	Appropriation Year	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	Appropriations	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	CEAR Number	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	Customer Type	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	Municipal Code	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	Operating Unit	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	Project Category	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	Project Type	19-DEC-2011 11:13:23				<input checked="" type="checkbox"/>	
56004	Regulatory Region	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	
56004	Reporting Unit	19-DEC-2011 11:13:26				<input checked="" type="checkbox"/>	

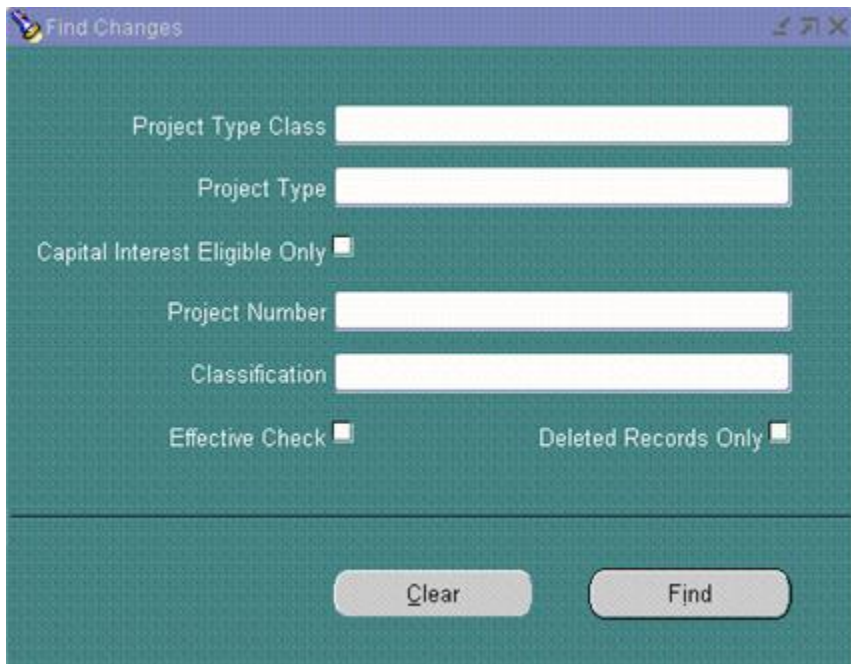
The Full History option shows every detailed change on the project including Class Codes.

Project Number	Class Category	Version	Effective From	Effective To	Changed By	Effective	Deleted By	Class Code	%	Created By	Created On
56004	Appropriations	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		411324			19-DEC-2011 11:13:26
56004	CEAR Number	1	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		4001			19-DEC-2011 11:13:26
56004	Customer Type	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		Urban			19-DEC-2011 11:13:26
56004	Municipal Code	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		0200			19-DEC-2011 11:13:26
56004	Operating Unit	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>					19-DEC-2011 11:13:26
56004	Project Category	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		Installation			19-DEC-2011 11:13:26
56004	Project Type	0	19-DEC-2011 11:13:23			<input checked="" type="checkbox"/>		C			19-DEC-2011 11:13:26
56004	Regulatory Region	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		North			19-DEC-2011 11:13:26
56004	Reporting Unit	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		PK0			19-DEC-2011 11:13:26
51024	Reporting Unit eff 20'	1	28-JUN-2012 13:47:38			<input checked="" type="checkbox"/>					19-DEC-2011 11:13:26
56004	Trench Type	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		Traditional Trench			19-DEC-2011 11:13:26
56004	Work Type	0	19-DEC-2011 11:13:26			<input checked="" type="checkbox"/>		Residential			19-DEC-2011 11:13:26
56004	Major Category	0	19-DEC-2011 11:13:23			<input checked="" type="checkbox"/>					19-DEC-2011 11:13:26
56004	CEAR	1	22-OCT-2012 15:52:47	22-OCT-2012 15:53:09	SYSADMIN	<input type="checkbox"/>		SYSADMIN			22-OCT-2012 15:52:46
56004	CEAR	0	22-OCT-2012 15:52:41	22-OCT-2012 15:52:46	SYSADMIN	<input type="checkbox"/>		00001			22-OCT-2012 15:52:46

Project Classification Change History Query

The ability to query across various projects allows a user to do a wide spread search of changes online. This is particularly useful for organizations that use the Project Classifications for capital interest, revenue functions, allocating and other processing that may require a search for changes prior to running a system process.

The query will return the same information as a Classification History search on a project but it will include multiple projects.



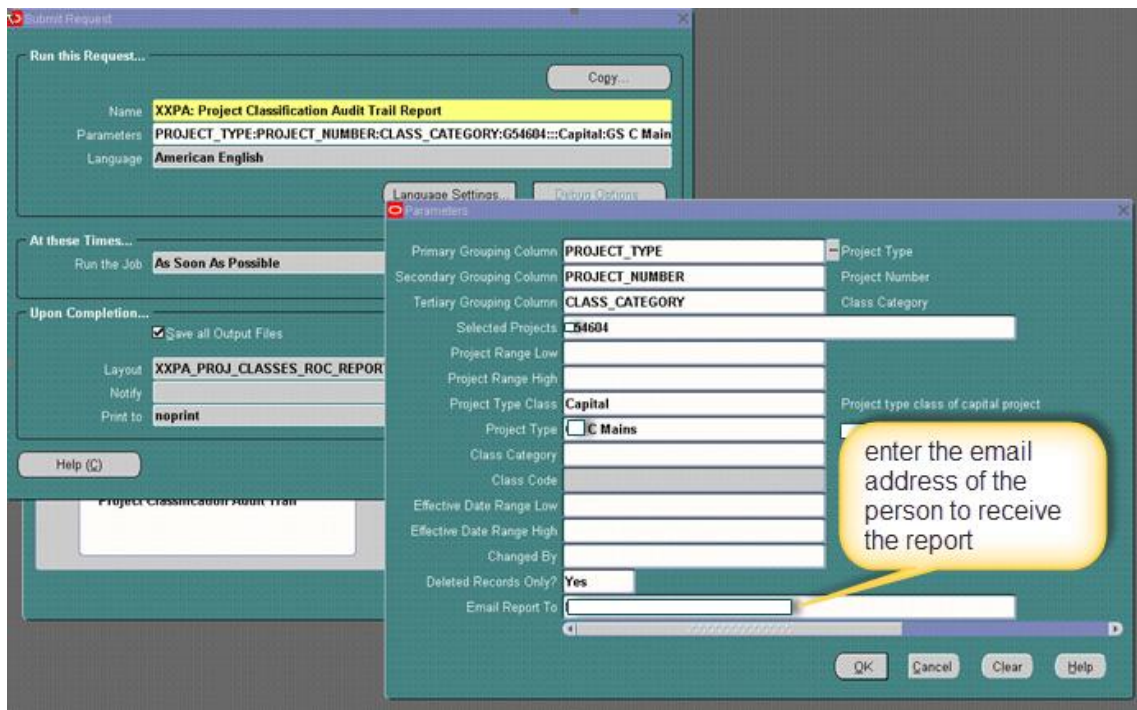
The screenshot shows a web-based query form titled "Find Changes". The form has a dark green background and contains the following fields and controls:

- Project Type Class**: A text input field.
- Project Type**: A text input field.
- Capital Interest Eligible Only**: A checkbox.
- Project Number**: A text input field.
- Classification**: A text input field.
- Effective Check**: A checkbox.
- Deleted Records Only**: A checkbox.
- Clear**: A button.
- Find**: A button.

Project Classification Audit Trail Report

Included with Quantas Classification Tracker is the Project Classification Audit Trail Report. This option provides a report of the changes so the user can view it online, generate a hard copy or share the output with other users

The report is run as a concurrent request in Oracle. Various parameters allow users to narrow or broaden their query criteria. A user can email the report to another individual if required.



The report output displays the data that have been changed as well as the users and dates that the change occurred.

Project Classification Audit Trail Report														
Database Instance: <DB>														
Selected Project: 95604														
Project Class: CAPITAL														
Project Type: C Mains														
Locked Records Only: Yes														
Capital Interest Eligible: Yes														
Project Type	Project Number	Class Category	Effective Start Date	Effective End Date	Changed By	Deleted By	Class Code	Percentage	Project Type Class	Capital Interest Eligible	Attribute Category	BIT Attribute 1	BIT Attribute 2	BIT Attribute 3
C Mains	95604	CEAR	22-OCT-2010 15:52:47	22-OCT-2010 16:55:06	SYSADMIN	SYSADMIN	3104		CAPFC	Y				
			22-OCT-2010 15:52:47	22-OCT-2010 16:55:06	SYSADMIN				CAPFA					

Business Benefits

The Quantas Classification Tracker provides organizations with the ability to easily determine changes to Project Classifications. This improves project reporting, accounting accuracy and the credibility of project data. Organizations that have used this feature have saved hundreds of hours and provided Project Management and Administrative staff the tool to answer Project Classification questions easily.

Conclusion

This feature provides credible and accurate project reporting which is the goal of all project related organizations. This tool provides Oracle Projects users with the ability to determine changes to the Project Classifications on their projects in a timely manner.