

Load Project Organizations Using HCM Data Loader

ORACLE PPM CLOUD SERVICES SOLUTION OVERVIEW | AUGUST 2018





Disclaimer

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.



Table of Contents

Disclaimer	1
Requirements Overview	1
Solution Overview	1
Prerequisite	1
Implementation Steps	1

Requirements Overview

Load project and task owning organizations as well as project expenditure organizations in bulk using the HCM Data Loader (HDL).

Solution Overview

The solution utilizes the HCM Data Loader (HDL) functionality to enable implementers load a large number of project and task owning organizations as well as project expenditure organizations. Additional information on how to use HDL can be found on Oracle Help Center -> Introduction to Integrating with Oracle HCM Cloud -> Introduction to HCM Data Loader.

The implementation steps are valid starting with Release 13.17.11.

Prerequisite

The departments should also have been created using HDL. This is because while creating the departments via HDL, the **SourceSystemOwner** and **SourceSystemId** attributes must be specified. These attribute values will be used when using HDL to classify the departments as project organizations.

Implementation Steps

1. Create departments using HDL. Ensure that **SourceSystemOwner** and **SourceSystemId** attributes are provided for each department. You can skip this step if the Department is already present, however please keep note of the **SourceSystemOwner** and **SourceSystemId** to be used while uploading project classifications. Here is a sample content of the **Organization.dat** file used for loading departments via HDL. It will create two simple departments and are provided here only for illustration purposes. Your actual department might hold a lot more information than this. Instructions to create departments via HDL are not in the purview of this document.

```

METADATA|Organization|EffectiveStartDate|EffectiveEndDate|Name|ClassificationCode|InternalExternal|ClassificationName|SourceSystemOwner|SourceSystemId
MERGE|Organization|2000/01/17|4712/12/31|HDL_DEMO_DEP_3|DEPARTMENT|INT|Department|HRC_SQL
LOADER|HDL_DEMO_3
MERGE|Organization|2018/05/15|4712/12/31|HDL_DEMO_DEP_4|DEPARTMENT|INT|Department|HRC_SQL
LOADER|HDL_DEMO_4
METADATA|OrgUnitClassification|EffectiveStartDate|EffectiveEndDate|OrganizationId(SourceS
ystemId)|ClassificationCode|CategoryCode|Status|SetId|SourceSystemOwner|SourceSystemId
MERGE|OrgUnitClassification|2000/01/17|4712/12/31|HDL_DEMO_3|DEPARTMENT|DEPARTMENT|A|0|HR
C_SQLLOADER|HDL_DEMO_3_CLASS_DEPT
MERGE|OrgUnitClassification|2018/05/15|4712/12/31|HDL_DEMO_4|DEPARTMENT|DEPARTMENT|A|0|HR
C_SQLLOADER|HDL_DEMO_4_CLASS_DEPT

```

2. Verify that the departments have been properly loaded.
3. Setup the Organization.dat file to classify the departments created above as Project Task Owning Organization and Project Expenditure Organization.

Please note that in this upload you should not provide the METADATA for the Organization, otherwise you might face the error : "The flexfield category code must be same as the classification code". This is a known issue and will be resolved in a future release.

The sample given below classifies the two departments created above.
The columns that are constant across all records are in green.
The columns that might change across records are in red.

```

METADATA|OrgUnitClassification|EffectiveStartDate|EffectiveEndDate|OrganizationId(SourceS
ystemId)|ClassificationCode|CategoryCode|Status|SetId|SourceSystemOwner|SourceSystemId
MERGE|OrgUnitClassification|2000/01/17|4712/12/31|HDL_DEMO_3|PA_PROJECT_ORG|PA_PROJECT_OR
G|A||HRC_SQLLOADER|HDL_DEMO_3_CLASS_PTOO
MERGE|OrgUnitClassification|2000/01/17|4712/12/31|HDL_DEMO_3|PA_EXPENDITURE_ORG|NO_EFF_CA
TEGORY|A||HRC_SQLLOADER|HDL_DEMO_3_CLASS_PEO
MERGE|OrgUnitClassification|2018/05/15|4712/12/31|HDL_DEMO_4|PA_PROJECT_ORG|PA_PROJECT_OR
G|A||HRC_SQLLOADER|HDL_DEMO_4_CLASS_PTOO
MERGE|OrgUnitClassification|2018/05/15|4712/12/31|HDL_DEMO_4|PA_EXPENDITURE_ORG|NO_EFF_CA
TEGORY|A||HRC_SQLLOADER|HDL_DEMO_4_CLASS_PEO
METADATA|OrgInformation|FLEX:PER_ORGANIZATION_INFORMATION_EFF|allowIndirectProjects(PER_O
RGANIZATION_INFORMATION_EFF=Project Type Class
Information)|allowProjectsEnabledForCapital(PER_ORGANIZATION_INFORMATION_EFF=Project Type
Class
Information)|allowProjectsEnabledForBilling(PER_ORGANIZATION_INFORMATION_EFF=Project Type
Class
Information)|EffectiveStartDate|EffectiveEndDate|ClassificationCode|ClassificationName|Or
gInformationContext|OrganizationName|EFF_CATEGORY_CODE|SequenceNumber|SourceSystemOwner|S
ourceSystemId|OrganizationId(SourceSystemId)
MERGE|OrgInformation|Project Type Class
Information|Y|Y|Y|2000/01/17|4712/12/31|PA_PROJECT_ORG|Project Task Owning
Organization|Project Type Class
Information|HDL_DEMO_DEP_3|PA_PROJECT_ORG|1|HRC_SQLLOADER|HDL_DEMO_3_INFO_PTOO|HDL_DEMO_3
MERGE|OrgInformation|Project Type Class
Information|Y|Y|Y|2018/05/15|4712/12/31|PA_PROJECT_ORG|Project Task Owning
Organization|Project Type Class
Information|HDL_DEMO_DEP_4|PA_PROJECT_ORG|1|HRC_SQLLOADER|HDL_DEMO_4_INFO_PTOO|HDL_DEMO_4

```

The column values are explained below:

METADATA|OrgUnitClassification:

Column	Value
EffectiveStartDate	Effective Start Date of the department
EffectiveEndDate	4712/12/31
OrganizationId(SourceSystemId)	The SourceSystemId specified for the Department in department HDL file
ClassificationCode	Specify PA_PROJECT_ORG for Project Task Owning Organization classification and PA_EXPENDITURE_ORG for Project Expenditure Organization classification
CategoryCode	Specify PA_PROJECT_ORG when ClassificationCode is PA_PROJECT_ORG and NO_EFF_CATEGORY when ClassificationCode PA_EXPENDITURE_ORG.
Status	A
SetId	No value
SourceSystemOwner	Same as what was specified in the department HDL
SourceSystemId	Unique value for this record

METADATA|OrgInformation:





Column	Value
FLEX:PER_ORGANIZATION_INFORMATION_EFF	Project Type Class Information
allowIndirectProjects(PER_ORGANIZATION_INFORMATION_EFF=Project Type Class Information)	Allow Indirect Projects checkbox. If checkbox should be checked, then put Y, else put N
allowProjectsEnabledForCapital(PER_ORGANIZATION_INFORMATION_EFF=Project Type Class Information)	Allow Capital Projects checkbox. If checkbox should be checked, then put Y, else put N
allowProjectsEnabledForBilling(PER_ORGANIZATION_INFORMATION_EFF=Project Type Class Information)	Allow Contract Projects checkbox. If checkbox should be checked, then put Y, else put N
EffectiveStartDate	Effective Start Date of the department
EffectiveEndDate	4712/12/31
ClassificationCode	PA_PROJECT_ORG
ClassificationName	Project Task Owning Organization
OrgInformationContext	Project Type Class

	Information
OrganizationName	Name of the department
EFF_CATEGORY_CODE	PA_PROJECT_ORG
SequenceNumber	1
SourceSystemOwner	Same as what was specified in the department HDL
SourceSystemId	Unique value for this record
OrganizationId(SourceSystemId)	The SourceSystemId specified for the Department in department HDL file

4. Zip the Organization.dat file and load it via HDL. Once HDL completes successfully, verify from the Manage Project Organizations Classifications page that the departments are properly classified.



CONNECT WITH US

-  blogs.oracle.com/oracle
-  facebook.com/oracle
-  twitter.com/oracle
-  oracle.com

Oracle Corporation, World Headquarters

500 Oracle Parkway
Redwood Shores, CA 94065, USA

Worldwide Inquiries

Phone: +1.650.506.7000
Fax: +1.650.506.7200

Hardware and Software, Engineered to Work Together

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.0115

Load Project Organizations Using HCM Data Loader
August 2018
Author: Anunay Sinha