

Tech Leads IT

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Oracle Fusion PPM Course Content

Modules:

- ❖ **Functional Setup Manager**
- ❖ **Project Foundation**
- ❖ **Project Costing**
- ❖ **Project Billing**
- ❖ **Project Contracts**
- ❖ **Project Control**
- ❖ **Project Performance Reporting**

Initial Users

- Creating Implementation Users
- Create Data Role for Implementation Users
- Run User and Roles Synchronization Process

Enterprise Profile

- Establish Enterprise Structures
- Manage Reference Data Sets
- Manage Set Assignments for Set Determinant Type
- Manage Geographies
- Manage Locations
- Manage Enterprise HCM Information

Legal Structure

- Manage Legal Jurisdictions
- Manage Legal Entity
- Manage Legal Entity Registrations
- Manage Legislative Data Groups
- Manage Legal Entity HCM Information

Financial Reporting Structures

- Manage Currencies
- Manage Conversion Rate Types
- Manage Daily Rates
- Manage Chart of Accounts Value Sets

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- Manage Chart of Accounts Structures
- Manage Chart of Accounts Structure Instances
- Manage Chart of Accounts Value Set Values
- Manage Accounting Calendars
- Manage Primary Ledgers
- Assign Legal Entities
- Specify Ledger Options
- Assign Balancing Segment Values to Legal Entities
- Assign Balancing Segment Values to Ledger
- Review and Submit Accounting Configuration

Organization Structures

- Manage Business Unit
- Assign Business Unit Business Function
- Manage Business Unit Data Access for Users
- Manage Business Unit Set Assignment
- Manage Common CRM Business Unit Profile Options

Workforce Structures

- Manage Divisions
- Manage Departments
- Manage Department Trees
- Manage Job
- Manage Organization Trees

Project Organizations

- Manage Project Unit Organizations
- Manage Project Unit Options
- Manage Project Unit Set Assignments
- Manage Project Organization Classifications
- Manage Organization Hierarchies and Classifications
- Verify Default Asset Book Setup

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- Configure Project Accounting Business Function
- Submit Process to Maintain Project Organizations
- Manage Project Organization Classifications Data Access for Users

Users and Security

- Manage Users

Project Foundation

- Manage Project Foundation Value Sets
- Manage Project Foundation Descriptive Flex fields
- Manage Project Foundation Messages
- Manage Project Foundation Attachment Categories
- Manage Accounting Calendars
- Manage Accounting Periods for Project Financial Management
- Manage Project Accounting Periods
- Manage Units of Measure
- Manage Revenue Categories
- Manage Expenditure Categories
- Manage Expenditure Types
- Manage Project Class Categories
- Manage Service Types
- Manage Work Types
- Submit Process to Update Work Types
- Manage Project Statuses
- Manage Project Priority Values
- Manage Project Note Type
- Manage Project Note Type Mapping
- Manage Project Note Descriptive Flex fields
- Manage Oracle Social Network Objects for Project Foundation
- Manage Project Roles
- Require Task Managers to be Project Team Members

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- Manage Resource Classes
- Manage Job Mappings
- Allow People with Future Effective Start Dates as Project Members
- Specify Number of Days to Display People with Terminated Assignments
- Manage Non labour Resources
- Manage Rate Schedules
- Manage Labour Costing Multipliers
- Manage Labour Costing Rules
- Manage Labour Costing Overrides
- Configure Project Accounting Business Function: Overtime Calculation Indicator
- Manage Organization Costing Rules
- Manage Planning and Billing Resource Breakdown Structures
- Manage Reporting Resource Breakdown Structures
- Submit Process to Refresh Resource Breakdown Structure Element Names
- Manage Project Types
- Configure Project Numbering
- Manage Source Applications
- Manage Action Controls
- Distribute and Install Desktop Integrator Client

Burdening

- Manage Burden Cost Base Types
- Manage Burden Cost Bases
- Manage Burden Cost Codes
- Manage Burden Structures
- Manage Burden Schedules
- Submit Process to Build New Organization Burden Multipliers
- Manage Project Types: Burdening Options
- Manage Project Statuses: Burden Transaction Creation Status Control

Project Control

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- Manage Project Control Value Sets
- Manage Project Control Descriptive Flex fields
- Manage Project Control Messages
- Manage Project Control Attachment Categories
- Manage Period Profiles
- Manage Spread Curves
- Manage Resource Classes: Spread Curves
- Manage Financial Plan Types
- Manage Project Plan Types

Project Costing Base

- Manage Project Costing Value Sets
- Manage Project Costing Descriptive Flex fields
- Manage Project Costing Messages
- Manage Project Costing Attachment Categories
- Manage Project Transaction Sources
- Derive Billable Status of Expenditure Items from Work Type
- Derive Work Type for Project Expenditure Items
- Specify Number of Parallel Import and Process Cost Programs
- Specify Allocation Method for Zero-Basis Amounts
- Manage Project Standard Cost Collection Flex field
- Allow Cost Transactions with Zero Quantity as No billable
- Configure Project Accounting Business Function: Borrowed and Lent Options
- Manage Project Transaction Sources: Cross-Charge Indicator
- Manage Transfer Price Rules
- Manage Transfer Price Schedules

Capital Projects

- Verify Default Asset Book Setup
- Manage Standard Unit Costs
- Manage Expenditure Types: Proceeds of Sale Indicator

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- Manage Project Types: Capitalization Options
- Manage Project Statuses: Asset Capitalization Status Control
- Configure Project Accounting Business Function: Retirement Processing Indicator
- Manage Capitalized Interest Rates
- Manage Capitalized Interest Rate Schedules
- Manage Project Types: Default Interest Rate Schedule
- Manage Project Statuses: Capitalized Interest Generation Status Control

Project Creation

- Project Creation
- Task Creation
- Manage Financial Project Settings
- Manage Financial Project Plan
- Manage Project Budgets
- Setting up Transaction Controls
- Approve Project

Project Costing Integrations - In Projects

- Manage Unprocessed Costs
- Manage Unreleased Costs
- Capture Cost (Labour & Non-Labour) through ADFDI
- Import Cost
- Import Commitments
- Manage Project Cost
- Manage Committed Cost
- Manage Cost Distributions
- Create Accounting
- Review Journal Entries

Project Costing Integrations - sub ledgers

- Discuss basic required setups from sub ledger

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- From Payables
- From Purchasing - Period end
- From Purchasing - At Receipt
- From Inventory - Misc Issues
- From I-Expenses

Capital Project Integration

- Discuss basic required setup in Assets
- Generate Asset Lines
- Transfer to Assets
- Capitalize in Assets
- Tieback from Assets

Cost Adjustments

- Transfer

Allocation Process

Burdening Process

File Based Desktop Integrator

- Upload projects and tasks

Project Contracts

- Manage Contract Line Types
- Manage Contract Types
- Specify Customer Contract Management Business Function Properties
- Manage Common CRM Business Unit Profile Options
- Manage Document Sequence Categories
- Manage Document Sequences
- Manage Contract Party Roles
- Manage Contract Contact Roles
- Manage Contract Role Sources
- Manage Contract Hold Reasons
- Manage Contract Cancellation Reasons

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- Manage Contract Close Reasons

Project Billing Base

- Manage Event Types
- Manage Rate Change Reasons
- Manage Billing Cycles
- Manage Invoice Formats
- Manage Invoice Templates
- Manage Revenue Methods
- Manage Invoice Methods
- Specify Unit of Measure for Invoice Lines Sent to Oracle Fusion Receivables
- Specify Customer Contract Management Business Function Properties: Billing Options
- Manage Auto Invoice Line Ordering Rules
- Manage Auto Invoice Grouping Rules
- Manage Receivables Payment Terms
- Manage Auto Accounting Rules
- Manage Transaction Types
- Manage Transaction Sources

Project Billing and GL Integration

- Discuss basic configurations from Receivables
- Generate Invoice by using different billing methods
- Submit, approve, release and transfer to AR
- Import in to AR
- Confirm invoice Acceptance in Receivables
- Generate Revenue
- Transfer to GL
- Review Journal entries

Project Performance Reporting

- Manage Project Unit Options: Performance Reporting Options
- Manage Status Indicators
- Manage Trend Indicators

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- Manage KPI Categories
- Manage Performance Measures
- Manage Key Performance Indicators
- Manage Region Layouts
- Manage Cross Project Comparison Graph Types
- Manage Project Performance Reporting Messages

Budgetary Control and Encumbrance Accounting

- Manage Budgetary Control
- Manage Budget Calendars
- Manage Control Budget

Project Accounting

- Manage Mapping Sets
- Manage Account Rules
- Manage Sub ledger Journal Entry Rule Sets
- Manage Accounting Methods
- Activate Sub ledger Journal Entry Rule Set Assignments