Oracle Project Portfolio Management Cloud
Getting Started with Your PPM Implementation

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# Contents

## Preface

1. **Introduction**
   - Overview of Oracle Project Portfolio Management Cloud Services
   - Workflows in Oracle Project Portfolio Management Cloud
   - Oracle Project Portfolio Management Cloud Profile Options

2. **Implement Project Financial Management Applications**
   - Overview of Project Financial Management and Grants Management Offerings
   - Organization Structures for Project Financial Management
   - Project Foundation
   - Project Control
   - Project Costing
   - Project Billing
   - Project Performance Reporting
   - Project Templates

3. **Implement Project Execution Management Applications**
   - Overview of Project Execution Management Implementation
   - Common Project Execution Options
   - Project Management Configuration
   - Project Resource Management Configuration
Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons ? to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the Oracle Help Center to find guides and videos.
- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

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Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction

Overview of Oracle Project Portfolio Management Cloud Services

Oracle Project Portfolio Management Cloud is a complete and integrated solution which dramatically improves the way project-driven organizations work, enabling efficient and effective project management while ensuring smarter business decisions based on a single source of project truth. Oracle Project Portfolio Management Cloud Services include the following applications:

- **Project Financial Management Offering**
  - Oracle Fusion Project Control Cloud Service
  - Oracle Fusion Project Costing Cloud Service
  - Oracle Fusion Project Billing Cloud Service
  - Oracle Fusion Project Contracts Cloud Service
  - Oracle Fusion Project Performance Reporting Cloud Service

- **Project Execution Management Offering**
  - Oracle Fusion Project Management Cloud Service
  - Oracle Fusion Task Management Cloud Service
  - Oracle Fusion Project Resource Management Cloud Service

Applications in the Project Financial Management Offering

Project Financial Management applications in the Oracle Project Portfolio Management Cloud Service enable you to plan, organize, and manage activities, resources, cost, billing, and revenue to bring about the successful completion of specific project goals and objectives.

This table lists the Project Financial Management applications available on cloud.

<table>
<thead>
<tr>
<th>Application</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Foundation</td>
<td>Includes common components that are shared across Oracle Fusion Project Portfolio Management. Includes the basic project plan structure and components such as resource breakdown structures, rate schedules, pricing, burdening, and cross-charge processing.</td>
</tr>
<tr>
<td>Project Control</td>
<td>Provides full-function project planning, progress management, as well as budgeting and forecasting.</td>
</tr>
<tr>
<td>Project Costing</td>
<td>Captures and processes commitments and costs from Oracle Fusion Applications and third-party applications.</td>
</tr>
</tbody>
</table>
Oracle Project Portfolio Management Cloud
Getting Started with Your PPM Implementation

Chapter 1
Introduction

Application Description

Project Billing Accelerates invoice processing while reducing billing errors through a functionally rich work area offering visibility into formatted invoices with estimated taxes. Embedded analytics for contract revenue, invoice, profitability and margin give insight into potential contract and payment problems.

Project Performance Reporting Helps project-driven organizations keep pace through project performance insight. It allows project stakeholders to receive answers to critical business questions and take action in real time, utilizing a multidimensional model to deliver the right information at the right time.

Enhance contract management and reporting capabilities by subscribing to the following services:

- Oracle Fusion Enterprise Contracts Management Base Cloud Service
- Oracle Fusion Transactional Business Intelligence for Projects Cloud Service

Applications in the Project Execution Management Offering

Project Execution Management applications in the Oracle Project Portfolio Management Cloud Service enable you to work together to plan and deliver projects, collaborate on project and non-project tasks all in one place, and find best-fit project resources to staff projects.

This table lists the Project Execution Management applications available on cloud.

<table>
<thead>
<tr>
<th>Application</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>Extends project planning, management, and scheduling capabilities to all individuals within the enterprise who are required to manage project-based work Project managers can engage with team members to develop tasks, resolve issues, report progress, and monitor the status of the project to ensure that objectives are met.</td>
</tr>
<tr>
<td>Task Management</td>
<td>Lets organizations manage all work and related interactions in a consolidated place. Team members, challenged by the quantity of tasks they own, no longer have to track administrative and project work in different places since all tasks are managed in a single view.</td>
</tr>
<tr>
<td>Resource Management</td>
<td>Enables organizations to optimize the allocation and utilization of their most precious resource: their people. Innovative and intuitive tools let resource managers and project managers ensure that the best-fit resource is identified and placed on each and every project assignment, to the benefit of the organization, the project resource, and the end customer, for either internal or external billable projects.</td>
</tr>
</tbody>
</table>

Project Portfolio Management Implementation Documentation

This guide contains procedures that enable you to quickly and efficiently configure Project Financial Management and Project Execution Management applications to meet your business requirements.

For additional information before implementing the Project Portfolio Management applications, see the following guides:

- Oracle ERP Cloud Securing ERP
- Oracle Applications Cloud Using Common Features
Oracle Applications Cloud Using Functional Setup Manager

For additional information on implementing Project Portfolio Management applications, see the following guides:
- Oracle Project Portfolio Management Cloud Implementing Project Financial Management
- Oracle Project Portfolio Management Cloud Implementing Project Execution Management

Workflows in Oracle Project Portfolio Management Cloud

A workflow is a set of business processes where a task moves from one participant to another based on predefined rules. You can create a workflow for specific tasks. Based on the settings, the application notifies the participants of status changes and actions they have to take.

This table lists the workflows in the Oracle Project Portfolio Management Cloud applications.

<table>
<thead>
<tr>
<th>Workflow Name</th>
<th>Initiating Event</th>
<th>Notification Type</th>
<th>Workflow Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Status Change</td>
<td>Update and save the project status.</td>
<td>Action: Approve or reject</td>
<td>Notify project managers to approve or reject the changes made to the project status.</td>
</tr>
<tr>
<td>Invoice Approval</td>
<td>Submit invoice for approval.</td>
<td>Action: Approve or reject</td>
<td>Notify billing specialist that an invoice is submitted for approval. The workflow can be configured to also notify the project managers of the projects associated to the invoice.</td>
</tr>
<tr>
<td>Task Notification</td>
<td>1. Assign task to team member.</td>
<td>Non-action: Information only</td>
<td>Notify team members when assigned to a task. Notify followers when added to a task as a follower or when the task is complete. The initiator of an event doesn’t get any notification.</td>
</tr>
<tr>
<td>Financial Plan Version Approval</td>
<td>1. Create plan version.</td>
<td>Action: Approve or reject</td>
<td>Notify project manager and team members when a financial plan is submitted for approval. Only project manager can approve or reject the financial plan version.</td>
</tr>
<tr>
<td>Expenditure Item Adjustment</td>
<td>Participant without appropriate privileges attempts any of the following adjustments on an expenditure item: 1. Transfer 2. Split 3. Split and transfer 4. Set to billable</td>
<td>Action: Approve or reject</td>
<td>Notify designated approvers to approve or reject the expenditure item adjustment request.</td>
</tr>
<tr>
<td>Workflow Name</td>
<td>Initiating Event</td>
<td>Notification Type</td>
<td>Workflow Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------</td>
<td>------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Expenditure Item Adjustment</td>
<td>Approver approves or rejects an adjustment.</td>
<td>Non-action: Information only</td>
<td>Notify the initiator with the status when the approver acts on an adjustment request.</td>
</tr>
<tr>
<td>Request Notification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Manager Daily Digest</td>
<td>Regular notification containing status of tasks, issues, action items, deliverables, change orders, task exceptions.</td>
<td>Non-action: Information only</td>
<td>Notify project managers about important status changes for tasks, issues, action items, deliverables, change orders, and task exceptions.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Project Enterprise Resource</td>
<td>1. Resource To Date is modified.</td>
<td>Notify project managers and resource managers of all current and future project assignments when a resource is no longer available for project assignment.</td>
</tr>
<tr>
<td>Availability Change</td>
<td></td>
<td>2. Resource is no longer available for project assignment.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Change Orders Notification</td>
<td>1. Create change order or reassign change order to a different resource.</td>
<td>Notify creator, owner, and previous owner when orders are created or modified. The creator, owner, and previous owner only receive specific notifications depending on the notification configurations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Close change order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Cancel change order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Approve or reject change order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Complete working on change order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. Remove a participant from change order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>7. Add a participant to change order</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Deliverable Notification</td>
<td>Deliverable is complete.</td>
<td>Notify creator, owner and project manager when a deliverable is complete.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow Name</td>
<td>Initiating Event</td>
<td>Notification Type</td>
<td>Workflow Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>---------------------------------------</td>
<td>-----------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Issue Notification                    | 1. Create issue or reassign issue to a different resource.  
                                           2. Close issue.  
                                           3. Delete issue. | Non-action: Information only         | Notify issue owners when a new issue is assigned to them, or reassigned to a new owner, closed or deleted. |
| Issue Action Items                    | 1. Create new action item for the issue.  
                                           2. Reassign action item to a different resource.  
                                           3. Close action item.  
                                           4. Delete action item. | Non-action: Information only         | Notify issue owners when a new action item is assigned to them, reassigned to another person, closed, or deleted. |
| Adjusted Resource Assignment Schedule Notification | Approve resource for assignment, adjust assignment schedule, or cancel assignment. | Non-action: Information only | Notify resource when a project resource assignment is created or adjusted. |
| Resource Staffing Option              | Deselect the Manage Resource Availability and Staffing option in the resource definition. | Non-action: Information only | Notify resource pool owner and project managers for projects where the resource is a team member. This workflow is not available through BPM worklist. |
| Resource To Date                      | Enter a To Date in the resource definition to set a date when the resource is no longer available for staffing. | Non-action: Information only | Notify project managers for projects where the resource is a team member. This workflow is not available through BPM worklist. |
| Request Proposed Resource Approval    | Propose resource to fulfill assignment. | Action: Approve or reject   | Notify the requester and other pre-determined participants to approve a proposed resource for a project assignment. |
| Proposed Resource Approval or Rejection Notification | Approve or reject proposed resource for assignment. | Non-action: Information only | Notify participant of an approval or rejection of the proposed resource for a project assignment. |
| Submitted Resource Request Notification | Submit project resource request for fulfillment. | Non-action: Information only | Notify staffing owner and other pre-determined participants when a project resource request is submitted. |
| Assignment Adjustment Approval        | 1. Change in resource assignment schedule.  
                                           2. Cancel a resource assignment. | 1. Action: Approve or reject  
                                           2. Non-action: Information only | 1. Notify project managers and staffing owners to approve or reject resource assignment adjustments.  
                                           2. Notify the requester if the approver approves or rejects the adjustment request. |
How to Access the BPM Worklist

You can access the approval and notification tasks in the BPM Worklist through the Oracle Functional Setup Manager or from the notifications window.

To access the BPM worklist:

1. Navigate to the Setup and Maintenance work area.
2. Search for a task list for a specific offering. For example, you can search for the task list Define Approval Management for Project Financial Management.
3. Click the task list and then click the task to access in the BPM Worklist. For example, you can click the task Manage Task Configurations for Project Financial Management.

Alternatively, to access the BPM Worklist from the Notifications window, click Notifications > More Details > Projects.

Related Topics

- Overview of Workflow Tasks
- Actions and Statuses for Workflow Tasks

Oracle Project Portfolio Management Cloud Profile Options

Project application administrators can use profile options to centrally manage UI settings and application behavior. You can find the available profile options for your offering using the Manage Profile Options setup task from the Setup and Maintenance work area. You can use the Manage Administrator Profile Values setup task to view and update the values for the profile options. Set profile options to configure certain features in the following Oracle Project Portfolio Management Cloud applications:

- Grants Management
- Project Foundation
- Project Billing
- Project Costing
- Project Performance Reporting

Project Foundation Profile Options

The following table lists the name, description, and available values of the profile options that configure features in Project Foundation, and the corresponding setup task name in Functional Setup Manager.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Description</th>
<th>Available Values</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated Group Spaces Enabled</td>
<td>Specify whether to create or maintain group spaces automatically.</td>
<td>Yes (default)</td>
<td>Enable Automated Project Spaces</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Number of Days to Display People with Terminated Assignments</td>
<td>Specify the number of days to display an employee in assigned projects after the employee termination date.</td>
<td>0 (default)</td>
<td>Specify Number of Days to Display People with Terminated Assignments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enter number of days</td>
<td></td>
</tr>
</tbody>
</table>
### Project Billing Profile Options

The following table lists the name, description, and available values of the profile option that configures a feature in Project Billing, and the corresponding setup task name in Functional Setup Manager.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Description</th>
<th>Available Values</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit of Measure for Invoice Lines Sent to Receivables</td>
<td>Specify the unit of measure to use when sending invoice lines to Receivables.</td>
<td>Each (default)</td>
<td>Specify Unit of Measure for Invoice Lines Sent to Receivables</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select a unit of measure defined in Receivables</td>
<td></td>
</tr>
<tr>
<td>Credit Hold Prevents Revenue Recognition</td>
<td>Specify whether customer credit hold should prevent revenue recognition.</td>
<td>No (default)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Net Credit Invoicing</td>
<td>Specify whether net credit invoicing is enabled.</td>
<td>No (default)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Project Billing License Enabled</td>
<td>Specify whether Project Billing is licensed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Require Projects for Events Based on Project Contract Lines</td>
<td>Specify whether project lines on contracts require associated projects and if related events require the selection of a project.</td>
<td>Yes (default)</td>
<td>Manage Event Types</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Separate Invoices by Top Task</td>
<td>Specify whether invoices need to be created per top task.</td>
<td>No (default)</td>
<td>Manage AutoInvoice Grouping Rules</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Number of Parallel Invoice Generation Programs</td>
<td>Specify a value between 2 and 5 to create the number of instances of the process that</td>
<td>1 (default)</td>
<td>Manage Administrator Profile Values</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 to 5</td>
<td></td>
</tr>
</tbody>
</table>
### Project Costing Profile Options

The following table lists the name, description, and available values of the profile options that configure features in Project Costing, and the corresponding setup task name in Functional Setup Manager.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Description</th>
<th>Available Values</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Updates Allowed on Project-Related Distributions</td>
<td>Specify whether to update project-related accounts when purchase orders and invoice distributions occur.</td>
<td>No (default) Yes</td>
<td>Allow Account Updates on Project-Related Distributions</td>
</tr>
<tr>
<td>Allocation Method for Zero-Basis Amounts</td>
<td>Specify the allocations method if the basis amount is zero.</td>
<td>Report as exception (default) Spread evenly</td>
<td>Specify Allocation Method for Zero-Basis Amounts</td>
</tr>
<tr>
<td>Default Expenditure Item Date for Supplier Cost Transactions</td>
<td>Specify the expenditure item date for the supplier cost transactions that are matched to purchase orders. This date is used on purchase receipts, payments, and discounts transferred to projects and invoices.</td>
<td>Source document expenditure item date (default) Transaction accounting date Transaction creation date Transaction date</td>
<td>Specify Default Expenditure Item Date for Supplier Cost Transactions</td>
</tr>
<tr>
<td>Number of Parallel Import Costs Programs</td>
<td>Specify the maximum number, between 1 and 10, of Import Costs programs that are allowed to run at the same time.</td>
<td>1 (default) Enter a number between 1 and 10</td>
<td>Specify Number of Parallel Import and Process Cost Programs</td>
</tr>
<tr>
<td>Work Type Derived for Expenditure Item</td>
<td>Specify whether work types should be derived for expenditure items.</td>
<td>No (default) Yes</td>
<td>Derive Work Type for Project Expenditure Items</td>
</tr>
<tr>
<td>Work Type Determines Billable Status of Expenditure Item</td>
<td>Specify whether an expenditure item is billable based on the associated work type definition.</td>
<td>No (default) Yes</td>
<td>Derive Billable Status of Expenditure Items from Work Type</td>
</tr>
<tr>
<td>Burden Transactions Assigned with Source Resources</td>
<td>Specify whether to assign both burden costs and source raw costs to the same resource class for reporting purposes.</td>
<td>No (default) Yes</td>
<td>Manage Project Types: Burdening Options</td>
</tr>
<tr>
<td>Cost Transactions with 0 Quantity Set as Nonbillable</td>
<td>Specify if cost transactions with 0 quantity are nonbillable.</td>
<td>No (default) Yes</td>
<td>Allow Cost Transactions with Zero Quantity as Nonbillable</td>
</tr>
</tbody>
</table>

would run in parallel to generate invoices more quickly.
## Project Performance Reporting Profile Options

The following table lists the name, description, and available values of the profile options that configure features in Project Performance Reporting, and the corresponding setup task name in Functional Setup Manager.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Description</th>
<th>Available Values</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Parallel Summarization Extraction Programs</td>
<td>Data summarization programs can start helper programs to manage the load on system resources. Specify the maximum number of helper programs that can exist at one time.</td>
<td>3 (default)</td>
<td>Specify Number of Parallel Summarization Extraction Programs</td>
</tr>
<tr>
<td>Enable Project Performance Data Process</td>
<td>Enable or disable Maintain Project Performance Data process.</td>
<td>No (default)</td>
<td></td>
</tr>
<tr>
<td>Display Format for Tasks in Smart View</td>
<td>Specify the format in which tasks appear in smart view.</td>
<td>Name (default)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enable this profile option to view task names, numbers, or a combination of task number and name in Oracle Smart View for Office. You can then identify tasks that have the same name distinctly also by viewing the task number along with the name.</td>
<td>Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number and Name</td>
<td></td>
</tr>
<tr>
<td>Enable automatic pushing actual to project plan after every online cost summarization</td>
<td>Enable automatic updating of actual in the project plan after every online Update Project Performance Data process for cost processing.</td>
<td>No (default)</td>
<td></td>
</tr>
<tr>
<td>Enable online summarization for costing events</td>
<td>Enable automatic summarization after every Import Costs process.</td>
<td>No (default)</td>
<td></td>
</tr>
<tr>
<td>Enable automatic summarization after every approved cost budget baseline</td>
<td>Enable automatic summarization after every approved cost budget baseline event.</td>
<td>No (default)</td>
<td></td>
</tr>
<tr>
<td>Enable online summarization for revenue and invoice events</td>
<td>Enable automatic summarization after every Generate Revenue and Update Invoice Details from Receivables process.</td>
<td>No (default)</td>
<td></td>
</tr>
<tr>
<td>Display all Projects dashboards or display project performance and Project Management Dashboards.</td>
<td>Controls the listing of Project Performance and Project Manager Dashboards in the Navigator and Home Page.</td>
<td>Yes (default)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
### Related Topics

- **Hierarchy in Profile Levels**
2 Implement Project Financial Management Applications

Overview of Project Financial Management and Grants Management Offerings

In the Project Financial Management and Grants Management business process areas, your enterprise can configure how you manage projects, including how to plan, budget, forecast, manage awards, collect costs, bill customers, and report performance.

Before you begin, use the Setup and Maintenance work area to access reports for each offering, including full lists of setup tasks, the functional areas and features that you can select when you configure the offering, and business objects and enterprise applications that are associated with the offering.

The first implementation step is to configure the offering in the Setup and Maintenance work area by selecting the offering, functional areas, and features that you want to make available to implement.

This table describes the project-related functional areas for the Project Financial Management and Grants Management offerings.

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Organizations</td>
<td>Configure how you manage project units, project classifications, organization hierarchies, and business unit options.</td>
</tr>
<tr>
<td>Project Foundation</td>
<td>Configure how you manage project organizations, create projects, plan project tasks, and review project details. This common foundation is shared across the Project Financial Management applications.</td>
</tr>
<tr>
<td>Burdening</td>
<td>Configure options used to calculate, group, and apply indirect costs to project expenditure items to report and account for the total cost of a project.</td>
</tr>
<tr>
<td>Grants Management Foundation</td>
<td>Configure how you create and maintain awards, award funding, and award projects.</td>
</tr>
<tr>
<td>Project Control</td>
<td>Configure how you monitor project execution, progress, budgeting, and forecasting.</td>
</tr>
<tr>
<td>Project Billing</td>
<td>Configure how you invoice customers and recognize revenue for project contracts, including contract management, intercompany billing, and the calculation of estimated taxes on invoices.</td>
</tr>
<tr>
<td>Project Costing</td>
<td>Configure how you collect, monitor and influence the costs associated with the delivery of the project and management of capital assets.</td>
</tr>
<tr>
<td>Project Costing - Project Costing Base</td>
<td>Configure how you collect, monitor, and influence the costs associated with the delivery of the project.</td>
</tr>
</tbody>
</table>
### Functional Area

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Costing - Capital Projects</td>
<td>Configure how you record asset costs, calculate capitalized interest, and create events to group costs and assets.</td>
</tr>
<tr>
<td>Project Billing - Project Contracts</td>
<td>Configure the funding and billing relationships between the external parties who require the project and the parties who deliver the project.</td>
</tr>
<tr>
<td>Project Billing - Project Billing Base</td>
<td>Configure how you invoice customers and recognize revenue for project contracts.</td>
</tr>
<tr>
<td>Project Billing - Internal Project Billing</td>
<td>Configure how you use internal invoices to share costs and revenue across projects and organizations.</td>
</tr>
<tr>
<td>Project Performance Reporting</td>
<td>Configure how you collect and review project performance data against defined performance areas.</td>
</tr>
<tr>
<td>Budgetary Control and Encumbrance Accounting</td>
<td>This enterprise-level functional area option is typically used by public sector customers. Enable this functional area if you plan to use budgetary control with or without encumbrance accounting in any part of your organization.</td>
</tr>
<tr>
<td>Project Business Intelligence Analytics</td>
<td>Enable business intelligence reporting and analytics capabilities for project management data.</td>
</tr>
<tr>
<td>Project Revenue and Billing Business Intelligence Analytics</td>
<td>Enable business intelligence reporting and analytics capabilities for project revenue and billing data.</td>
</tr>
<tr>
<td>Project Performance Business Intelligence Analytics</td>
<td>Enable business intelligence reporting and analytics capabilities for project performance data.</td>
</tr>
<tr>
<td>Project Control and Costing Business Intelligence Analytics</td>
<td>Enable business intelligence reporting and analytics capabilities for project control and costing data.</td>
</tr>
</tbody>
</table>

The following functional areas are also in the Project Financial Management and Grants Management offerings, but aren’t unique to these offerings:

- Initial Users
- Enterprise Profile
- Legal Structures
- Financial Reporting Structures
- Organization Structures
- Workforce Structures
- Users and Security
- Transaction Tax
- Transactional Business Intelligence
Optionally, create one or more implementation projects for the offerings, functional areas, and features that you want to implement first, which generates task lists for each project. The application implementation manager can configure the task list and assign and track each task.

This table lists the group of tasks that are available to you when you enable all functional areas and features.

<table>
<thead>
<tr>
<th>Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Initial Users for Project Financial Management</td>
<td>Populate the product tables with the users and roles held in LDAP and then create and provision job and data roles for the initial users.</td>
</tr>
<tr>
<td>Verify Grants Management Offering Implementation Status</td>
<td>Verify that the implementation status of the Grants Management offering is set to In Progress or Implemented. The implementation status enables the grants functionality throughout Oracle Fusion Project Portfolio Management applications.</td>
</tr>
<tr>
<td>Define Enterprise Profile for Project Financial Management</td>
<td>Access your enterprise organization, such as legal entities, legal jurisdictions and authorities, and business units, and specify their use in Project Financial Management applications.</td>
</tr>
<tr>
<td>Define Financial Reporting Structures for Project Financial Management</td>
<td>Define the accounting configuration and chart of accounts that serve as a framework for how financial records are maintained for an organization.</td>
</tr>
<tr>
<td>Define Organization Structures for Project Financial Management</td>
<td>Configure business units for controlling transactions and workforce structures for managing the enterprise.</td>
</tr>
<tr>
<td>Define Project Organizations</td>
<td>Manage the organizations that own, control, or contribute to projects, including the project units and the project and business unit implementation options used by Project Financial Management.</td>
</tr>
<tr>
<td>Define Users and Security for Project Financial Management</td>
<td>Define and assign security policies and data roles to enable users to perform functions related to their job roles.</td>
</tr>
<tr>
<td>Define Project Foundation Configuration</td>
<td>Configure all foundation components for creating and maintaining projects in Oracle Fusion Project Portfolio Management.</td>
</tr>
<tr>
<td>Define Project Control Configuration</td>
<td>Configure Oracle Fusion Project Control to monitor project execution, progress, budgeting, and forecasting.</td>
</tr>
<tr>
<td>Define Project Costing Configuration</td>
<td>Configure Oracle Fusion Project Costing to collect, monitor, and influence the costs associated with the delivery of the project.</td>
</tr>
<tr>
<td>Define Project Billing Configuration</td>
<td>Configure Oracle Fusion Project Billing to invoice customers and recognize revenue for project contracts.</td>
</tr>
<tr>
<td>Define Project Performance Reporting Configuration</td>
<td>Configure Oracle Fusion Project Performance Reporting to collect and review project data against defined performance areas.</td>
</tr>
<tr>
<td>Manage Project Templates</td>
<td>Manage templates to quickly create projects that share common features, attributes, and options.</td>
</tr>
<tr>
<td>Define Budgetary Controls for Project Financial Management</td>
<td>Configure the applicability of budgetary control on various business process flows, and set up the business rules to enforce budgetary control.</td>
</tr>
</tbody>
</table>
Define Subledger Accounting Rules for Project Financial Management


Define Transactional Business Intelligence Configuration

Define the configuration for Oracle Transactional Business Intelligence to enable business intelligence reporting with the Oracle Fusion Applications.

Alternatively, you can use the rapid implementation feature to set up the Project Financial Management or Grants Management offerings by populating and loading the Rapid Implementation for Project Financial Management Applications macro-enabled Excel spreadsheet. This spreadsheet has a worksheet for key setup object or group of setup objects. The setup includes key business objects and tasks such as, resources, burdening, and subledger accounting. The Setup and Maintenance work area has a specific task list for rapid implementation. The **Define Project Financial Management Configuration for Rapid Implementation** task list includes tasks to download a new spreadsheet and to load the setup data. For more information on the rapid implementation feature, see the chapter Rapid Implementation of Project Financial Management Applications in the Oracle Project Portfolio Management Cloud Implementing Project Financial Management guide.

This table lists the Rapid Implementation tasks included in the Define Project Financial Management Configuration for Rapid Implementation task list.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Project Financial Management Setup Data</td>
<td>Use this task to download the rapid implementation spreadsheet. After downloading the rapid implementation spreadsheet you can start entering your setup data.</td>
</tr>
<tr>
<td>Load Project Financial Management Setup Data</td>
<td>Use this task to load the setup data into the application.</td>
</tr>
</tbody>
</table>

After uploading the spreadsheet, the Project Financial Management or Grants Management application is fully configured and ready for you to create project templates and to enter transactions. You can upload the spreadsheet multiple times during the initial implementation until your setup is finalized.

Refer the following guides for more information:

- Securing ERP
- Implementing Common Features
- Using Functional Setup Manager

**Related Topics**

- Securing ERP guide
- Implementing Common Features guide
- Using Functional Setup Manager guide

Organization Structures for Project Financial Management
Overview of Organization Structures for Project Financial Management

In the Define Organization Structures for Project Financial Management activity, you configure business units for controlling transactions and workforce structures for managing the enterprise. For business units, you perform setup steps such as creating and managing business units, generating data roles, provisioning users with data roles, and assigning reference data to business units. For workforce structures, you perform setup steps such as creating and managing organizations, assigning workers to organizations, creating and managing hierarchies for the departments, and creating jobs.

This table lists the tasks and task lists that the setup tasks in the Define Organization Structures for Project Financial Management activity are grouped into.

<table>
<thead>
<tr>
<th>Task or Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Business Units for Project Financial Management</td>
<td>Access your business units, and specify units and attributes relevant to Project Financial Management applications. Create and maintain information on units of an enterprise to allow for flexible implementation, to provide a consistent entity for controlling and reporting on transactions, and to be an anchor for the sharing of sets of reference data across applications.</td>
</tr>
<tr>
<td>Manage Business Unit</td>
<td>Create and maintain information on units of an enterprise to allow for flexible implementation, to provide a consistent entity for controlling and reporting on transactions, and to be an anchor for the sharing of reference data sets across applications.</td>
</tr>
<tr>
<td>Verify Data Role Generation for Business Unit</td>
<td>Generate data roles or verify the data roles if already generated.</td>
</tr>
<tr>
<td>Provision Roles to Implementation Users for Business Unit</td>
<td>Provision implementation users with job or data roles, such as Application Implementation Consultant, IT Security Manager, or Application Administrator for a product family.</td>
</tr>
<tr>
<td>Assign Business Unit Business Function</td>
<td>Assign business functions to be performed by a business unit, such as customer invoicing and order capture.</td>
</tr>
<tr>
<td>Verify Data Role Generation for Business Unit Business Function</td>
<td>Generate data roles or verify the data roles if already generated.</td>
</tr>
<tr>
<td>Provision Roles to Implementation Users for Business Unit Business Function</td>
<td>Provision implementation users with job or data roles, such as Application Implementation Consultant, IT Security Manager, or Application Administrator for a product family.</td>
</tr>
<tr>
<td>Manage Business Unit Set Assignment</td>
<td>Assign reference data, which represents business rules and policies, to business units.</td>
</tr>
<tr>
<td>Define Workforce Structures for Project Financial Management</td>
<td>Configure structures to represent the management and operating requirements of the enterprise. Define the structures to support and represent workers using jobs, positions, and grades.</td>
</tr>
<tr>
<td>Manage Divisions</td>
<td>Create and manage the organizations that represent lines of business in the enterprise.</td>
</tr>
<tr>
<td>Manage Departments</td>
<td>Create and manage the organizations to which workers can be assigned.</td>
</tr>
<tr>
<td>Manage Department Trees</td>
<td>Create and manage hierarchies for departments to view the internal structures of the workforce.</td>
</tr>
<tr>
<td>Manage Job</td>
<td>Create and manage jobs.</td>
</tr>
</tbody>
</table>
### Create Organization Trees

<table>
<thead>
<tr>
<th>Task or Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Organization Trees</td>
<td>Create and manage hierarchies of organizations to view the structures of the enterprise.</td>
</tr>
</tbody>
</table>

### Create and Manage a Business Unit

A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy. A business unit can process transactions on behalf of many legal entities.

Verify that the implementation team set up the following in Oracle Human Capital Management:

- Organizations
- Organization hierarchies
- Organization classifications

#### Creating a Business Unit

Follow these steps to create a business unit:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Business Unit** task.
2. Click the **Manage Business Unit** link.
3. On the Manage Business Units page, click the **Create** icon.
4. In the Name field, enter the name for the business unit.
5. In the Default Set field, select a reference data set code.
6. Click **Save and Close**.

**Note:** Click **Create** on the list to create a new reference data set.

7. Click **Save and Close**.

#### Assign Business Function to a Business Unit

Follow these steps to assign business functions to a business unit:

1. Click **Navigator > Setup and Maintenance**, and search for the **Assign Business Unit Business Function** task.
2. Click the **Assign Business Unit Business Function** link.
4. In the Select and Add: Business Unit page, search and select your business unit and click **Save**. The Assign Business Functions page opens.
5. In the Financial Reporting section, enter primary ledger and default legal entity details.
7. Click **Save and Close**. The enabled business functions are now assigned to your business unit.

#### Managing Business Unit Data Access for Users

Follow these steps to manage business unit data access for users:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Business Unit Data Access for Users** task.
2. Click the Manage Business Unit Data Access for Users link.
3. Select the Users without Data Access option.
4. In the Search Results section, click the Create icon. Select user name, role, security context and security context value.
5. Click Save and Close.
6. To search for Users with data access, select Users with Data Access option.
7. Select User name and role in the search region.
8. Click Search.

☞ Note: To create a saved search click Save... In the Create Saved Search Window, type a name for your search. You can also enable Set as Default to set the saved search as default and Run automatically to run the search automatically later. You can get these values from Saved Search list later.

9. Click Save and Close.
10. Click Done.

Managing Business Unit Set Assignments
Follow these steps to manage business unit set assignments:
1. Click Navigator > Setup and Maintenance, and search for the Manage Business Unit Set Assignment task.
2. Click the Manage Business Unit Set Assignment link.
3. On the Manage Set Assignments page, change the assignment for each object as required.

☞ Note: The default set of the business unit is assigned to each reference data object. You must perform the Manage Business Unit Set Assignment task. Even if you don’t change any of the sets assigned, the assignment isn’t complete until the record is saved.

4. Click Save and Close.

Related Topics
• How Business Units Work with Projects
• Business Units
• Reference Data Sets and Sharing Methods
• Business Functions

Create and Manage a Project Unit
To create a project unit, either enable an existing organization as a project unit or create a new organization as a project unit in Oracle Human Capital Management. After an organization is defined as a project unit, the project unit appears in searches on the Manage Project Units page.

☞ Note: You must set up at least one project unit for your organization.

Creating Project Units
1. Click Navigator > Setup and Maintenance, and search for the Manage Project Unit Organizations task.
2. Click the Manage Project Unit Organizations link.
3. On the Manage Project Unit Organizations page, click the Create icon.
4. Enable Create new and enter code and name for the project unit.

Note: You can select an existing organization to define as a project unit. Enable Select an existing organization to define as a project unit and search for an existing organization. Select the organization and enter a code.

5. Click Save and Close.
6. Click Done.

Manage Project Unit Options

Use the Manage Project Unit Options task to set up the general and reporting options for your project unit.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Unit Options task.
2. Click the Manage Project Unit Options link.
3. Click the project unit you want to edit.
4. On the Manage Project Units: General Properties page, in the Default Set section, select the default reference data set that you want to use for the reference data objects within the project unit.
5. In the Project Numbering section, select the project numbering method and type.
6. Click Next.
7. On the Manage Project Units: Related Business Units page, associate the business units with the project unit. Select the business units that are accountable for financial transactions of projects in each project unit.
8. Click Next.
9. On the Manage Project Units: Reporting Setup page, complete the reporting options as appropriate.
10. Click Save and Close.
11. Click Done.

Managing Project Unit Set Assignments

Determine how reference data is shared or partitioned across the different lines of business in your company.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Unit Set Assignments task.
2. Click the Manage Project Unit Set Assignments link.
3. On the Manage Project Unit: Set Assignments page, change the assignment for each object as required.
4. Click Save and Close.
5. Click Done.

Related Topics

- Manage Project Unit Options
- Project Unit Components
- How can I associate a business unit with a project unit

Create an Organization

A department is an organization to which you assign workers. It is an organization with one or more operational objectives or responsibilities that exist independently of its manager. You track the department’s financial performance through one or
more cost centers. Examples of departments can be Sales, Human Resources, and Research and Development. You can report and keep track of headcount by creating a department hierarchy.

Creating a Department

1. Click Navigator > Setup and Maintenance, and search for the Manage Departments task.
2. Click the Manage Departments link.
3. On the Manage Departments page, click Create.
4. On the Create Department page, enable Create new and enter the department description details.
5. Click Next.
6. On the Create Department: Department Details page, enter the department details as applicable.
7. Click Submit.
8. Confirm whether you want to submit the request. The application generates a request ID when you confirm.
9. Click Done.

Related Topics
- Set Up Organizations for Project Financial Management
- Department Classifications

Classify Organizations to Own Projects and Tasks or Incur Costs on a Project

Specify organizations that can own projects and tasks, and incur project expenses. If an organizations can be a project and task owning organization, then you also specify whether the organization allows indirect, capital, and contract projects.

Classifying an Organization as Project Owning and Project Expenditure Organization

Follow these steps to classify an organization as a project owning and project expenditure organization:

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Organization Classifications task.
2. Click the Manage Project Organization Classifications link.
3. In the Search section, enter a name and effective date and click Search.
4. In the Search Results section, select an organization and click the Edit icon.
5. On the Edit Project Organization Classifications page, in the Change All Selected section, select the applicable options.
6. Click Save and Close.
7. Click Done.

Selecting the Organization Hierarchy Type and Classifications

Select the organization hierarchy type that enables you to assign organization hierarchies, such as the project and task owning organization hierarchy and project expenditure organization hierarchy, to project business units.

Follow these steps to selecting organization hierarchy type and classification:

1. Click Navigator > Setup and Maintenance, and search for the Manage Organization Hierarchies and Classifications task.
2. Click the Manage Organization Hierarchies and Classifications link.
3. In the Organization Hierarchy Type list, select an organization hierarchy type, for example, HCM Organization Hierarchy Tree Structure.

> Note: A hierarchy must be set up in Oracle Human Capital Management for the selected hierarchy type.

4. In the Organization Classifications section, from the Available column, select Asset Organization, Business Unit, Partner Organization, Project Expenditure Organization, Project Task Owning Organization, Project Unit Classification.

> Note: Generally the project expenditure organizations will also be departments.

5. Click the **Move selected items to other list** icon marked with a right arrow to move the items from the Available column to the Selected column.

6. Click **Save and Close**.

**Selecting Organization Hierarchies for the Business Unit**

Associate project and task owning organizations to the business unit to restrict the project owning organizations in the project creation flow.

The following conditions are required for an organization to be eligible to be a project and task owning organization:

- You must assign the Project and Task Owning Organization classification to the organization.
- The organization must belong to the hierarchy that you specify in the project implementation options for the business unit.

The following conditions are required for an organization to be eligible to be a project expenditure organization:

- You must assign the Project Expenditure Organization classification to the organization.
- The organization must belong to the hierarchy that you specify in the project implementation options for the business unit.

Follow these steps to select organization hierarchies for a business unit:

1. Click **Navigator > Setup and Maintenance**, and search for the **Configure Project Accounting Business Function** task.
2. Click the **Configure Project Accounting Business Function** link.
3. On the Configure Project Accounting Business Function page, in the Project Option section, enter the mandatory information in the following tabs:
   - Project Setup
   - Expenditures
   - Costing
   - Project Units
   - Cross-Charge Options
4. Click **Save and Close**.

**Associating Project Units with Business Units**

Associate project units to business units to share a common approach to financial management across a set of project units while maintaining independent setup data.
Follow these steps to associate a project unit with a business unit:

1. Click **Navigator > Setup and Maintenance**, and search for the **Configure Project Accounting Business Function** task.
2. Click the **Configure Project Accounting Business Function** link.
3. On the Configure Project Accounting Business Function page, in the Project Options section, click the Project Units tab and select the project units to associate with this business unit.
4. Click **Save and Close**.

**Related Topics**

- Set Up Organizations for Project Financial Management

### Project Foundation

#### Overview of Project Foundation Configuration

This table lists the setup task lists for Oracle Fusion Project Foundation.

<table>
<thead>
<tr>
<th>Task or Task List Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Project Calendars and Periods</td>
<td>Manage calendars, accounting period statuses, and project accounting period statuses used for costing, budgeting, forecasting, billing, and project performance reporting.</td>
</tr>
<tr>
<td>Define Types and Categorizations</td>
<td>Manage various classifications used to describe and group projects, tasks, and transactions.</td>
</tr>
<tr>
<td>Define Project Roles</td>
<td>Define project roles and the business rules that control how the roles are assigned.</td>
</tr>
<tr>
<td>Define Project Spaces</td>
<td>Configure how Oracle Fusion Projects interacts with Oracle WebCenter Spaces.</td>
</tr>
<tr>
<td>Define Project Resources</td>
<td>Define job mapping, attributes, and rate schedules for project resources.</td>
</tr>
<tr>
<td>Define Rate Schedules and Costing Rules</td>
<td>Define rate schedules and costing rules used for costing, billing, work planning, and financial planning purposes.</td>
</tr>
<tr>
<td>Define Project Resource Breakdown Structures</td>
<td>Define resource breakdown structures used for project planning, billing, and reporting.</td>
</tr>
<tr>
<td>Define Burdening</td>
<td>Configure options used to calculate, group, and apply indirect costs to project expenditure items to report and account the total cost of a project.</td>
</tr>
<tr>
<td>Manage Project Types</td>
<td>Create classifications for projects and configure basic options that are inherited by each project associated with that project type.</td>
</tr>
<tr>
<td>Define Transfer Pricing</td>
<td>Define rules and schedules to determine the transfer price amount of cross-charge transactions that require borrowed and lent or intercompany billing processing.</td>
</tr>
</tbody>
</table>
Define Action Controls
Define source products and configure action controls to determine which actions cannot be performed in Oracle Fusion Projects on data imported from a particular third-party source.

Define System Administration and Maintenance Options
Perform system administration functions including the definition of descriptive flexfields, distribution of desktop integrator, and configuration of system options.

This chapter provides detailed setup steps for the following required tasks:

- Manage Expenditure Types
- Manage Nonlabor Resources
- Manage Rate Schedules
- Manage Planning and Billing Resource Breakdown Structures
- Manage Project Types

Create Expenditure Types
Create expenditure types to classify the cost of each expenditure item.

Use expenditure types for processing requirements, such as calculating raw costs, to classify costs, and to plan, budget, forecast, and report on projects.

The following sections describe how to create expenditure types.

⚠️ **Note:** After you save an expenditure type, you can’t subsequently update the following attributes:
- Expenditure and revenue categories
- Unit of measure
- Rate required option
- Expenditure type class

If a change is required, you must enter a To Date to make the expenditure type unavailable and create another one.

Entering Basic Expenditure Type Information
To create an expenditure type:

1. Click Navigator > Setup and Maintenance, and search for the Manage Expenditure Types task.
2. Click the Manage Expenditure Types link.
   Use the Manage Expenditure Types page to define expenditure types and to review or edit existing expenditure types and the associated expenditure type classes, assigned sets, and tax classification codes.
3. Click the Add Row icon to create an expenditure type.
4. Enter a name in the Expenditure Type column. Optionally, enter a description.
5. The following table lists the decisions you need to take.
<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue Category</td>
<td>Determine the source of revenue, for example, fees or other payments, you plan to capture using this expenditure type.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Create revenue categories using the standard lookup greemoke focuses before creating expenditure types. You can update the lookup from the Manage Revenue Categories page or the Manage Standard Lookups page.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Determine the default UOM for costing and planning transactions associated with this expenditure type.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Use Hours as the UOM for labor expenditure types.</td>
</tr>
<tr>
<td>Rate Required</td>
<td>Determine whether cost rates must be provided for expenditure items associated with this expenditure type.</td>
</tr>
<tr>
<td>Proceeds of Sale</td>
<td>Determine whether cost rates must be provided for expenditure items associated with this expenditure type. Indicate whether the expenditure type is used to track the proceeds of sale for a capital project.</td>
</tr>
</tbody>
</table>

6. Select a date from which the expenditure type is available for use. Optionally, select a date to which the expenditure type is available.

### Selecting Expenditure Type Classes

Assign the expenditure type to one or more predefined expenditure type classes to determine how related expenditure items are processed.

For example, an expenditure item with the expenditure type **Materials** can have the expenditure type class **Supplier Invoice** if it originated in Oracle Fusion Payables or it can have the expenditure type class **Inventory** if it originated in Oracle Fusion Inventory.

In other words, you can use the same expenditure type for expenditures with different origins that must be grouped for costing, budgeting, or summarization purposes.

1. In the Expenditure Type Classes section, select an expenditure type class in the Name column.
2. Enter a date from which the expenditure type class is associated with the expenditure type. Optionally, specify a date to which the expenditure type class is associated with the expenditure type.
3. Repeat the process for each expenditure type class that you want to associate with the expenditure type.

### Assigning Sets

Use the Assigned Sets section to assign the expenditure type to one or more reference data sets so that only expenditure types that are relevant to the project unit are available for the project.
To assign sets:

1. Click **Add Row** in the Assigned Sets section.
2. Select the **Code** of the desired set.
3. Repeat the process for each set to which the expenditure type is assigned.

For additional information about set assignments, see the Create Financial Plan Types section of this document.

**Selecting Tax Classification Codes**

Optionally, select a default tax classification code to use for customer invoice lines for an expenditure type and business unit. To select a tax classification code:

1. Click **Add Row** in the Tax Classification Codes section.
2. Select a business unit.
3. Select a tax classification code.
4. Repeat the process for each tax classification code and business unit combination you want to associate with the expenditure type.
5. Click **Save**.
Create Nonlabor Resources

Create nonlabor resources to represent assets or pools of assets that project managers can use on projects.

As illustrated in the following figure, a nonlabor resource may be an equipment or resource with capacity that is consumed, such as a training room, or equipment with physical output that is consumed, such as a copier.

![Diagram of nonlabor resources and usage](image)

To create a nonlabor resource:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Nonlabor Resources** task.
2. Click the **Manage Nonlabor Resources** link.

   Use the Manage Nonlab Resource page to create, review, edit, or delete nonlabor resources.

3. Click the **Add Row** icon to create a nonlabor resource.
4. Enter a unique name, and optionally, a description for the nonlabor resource.
5. Select an **Expenditure Type** to determine the rates used to calculate cost and revenue for the nonlabor resource.

   **Note:** You can only select an expenditure type of Usage expenditure type class.

6. If you are creating a resource, such as a training room, whose capacity is consumed, then select the **Equipment Resource Class** check box.

   To indicate that the resource is equipment, the expenditure type you selected must use a UOM in Hours.
7. Enter a **From Date** to indicate the date from which the nonlabor resource is available for use. Optionally, specify an **To Date**.
8. Specify the organizations to which a nonlabor resource is assigned. Click the **Add Row** icon in the Nonlabor Resource Organizations section.
   You can assign nonlabor resources to any organization from the organization hierarchy, regardless of whether the organization has the Project Expenditure Organization classification, and regardless of the start and end dates for the organization.
9. In the **Name** field, select an organization.
10. Enter a **From Date** to indicate the date from which the nonlabor resource is assigned to the organization. Optionally, specify a **To Date**.
11. Repeat the process for each organization to which the nonlabor resource is assigned.
    You can't assign a nonlabor resource to an organization multiple times, even for different date ranges.
12. Click **Save**.

---

**Create Rate Schedules**

Create rate schedules as a source for cost or bill rates for costing, billing, or planning purposes.

You can create schedules for the following types of rates:

- Job
- Person
- Nonlabor
- Resource class

The following sections describe how you create the different types of rate schedules.

**Entering Basic Rate Schedule Information**

To create a rate schedule:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Rate Schedules** task.
2. Click the **Manage Rate Schedules** link.
   Use the Manage Rate Schedules page to create, delete, and maintain rate schedules.
3. Click the **Add Row** icon to create a rate schedule.
4. Enter a unique name, and optionally, a description for the rate schedule.
5. Select a **Project Rates Set**.
6. Select a **Schedule Type** depending on whether you want to create a rate schedule for jobs, persons, nonlabor resources, or resource classes.
7. Select the **Currency** in which you plan to enter rates.

**Creating Nonlabor Rate Schedules**

Define rates or percentage markups by nonlabor expenditure type or by a combination of nonlabor expenditure type, nonlabor resource, and nonlabor resource organization.

The application uses the most detailed information available to determine the rate. For example, if a rate exists for the expenditure type, nonlabor resource, and nonlabor resource organization combination, that rate is used. If that rate does not exist, it uses the rate for the expenditure type and nonlabor resource combination. Otherwise, the rate for the expenditure type is used.
Complete the following steps to create a nonlabor rate schedule:

1. Click Add Row in the Nonlabor Rates section.
2. Select the Expenditure Type for which you are entering rates.
3. Depending on the detail at which you want to enter rates, optionally select a Nonlabor Resource and a Nonlabor Resource Organization.
4. Select the Rate Required check box if you want to enter a rate or a markup percentage for the expenditure type. If you don’t select this option, you must provide a markup percentage.
5. Enter either a Rate or a Markup Percentage that is used to calculate amounts for the resource.
6. Enter a From Date to indicate the date from which the rate is available for use. Optionally, select a To Date.
7. Repeat this process for each expenditure type or expenditure type, nonlabor resource, and nonlabor resource organization for which you want to enter rates.
8. Click Save.

Creating Job Rate Schedules
Define rates for jobs included in a job set created in Oracle Fusion Human Capital Management.

Complete the following steps to create a job rate schedule:

1. In the Job Rates section, select a Job Set as a source for the jobs you are entering rates for.
2. Click Add Row.
3. Select the Job for which you are entering rates. Note that the Unit of Measure is always Hours.
4. Enter a rate for the job.
5. Enter a From Date to indicate the date from which the rate is available for use. Optionally, select a To Date.
6. Repeat this process for each job for which you want to enter rates.
7. Click Save.

Creating Person Rate Schedules
Define rates or percentage markups for person or for a combination of person, job, and organization.

The application uses the most detailed information available to determine the rate. For example, if there is a rate for Person, Person Assignment Job, and Person Assignment Organization, that rate is used. Otherwise, the rate for the person is used.

Complete the following steps to create a person rate schedule:

1. Click Add Row in the Person Rates section.
2. Select the person for whom you are entering rates. Note that the Unit of Measure is always Hours.
3. Depending on the detail at which you want to enter rates, optionally select a Person Assignment Job and a Person Assignment Organization.
   
   Note: A default value is provided for the assignment organization when you select an assignment job. You can select another organization if required.
4. Enter either a rate or a markup percentage.
5. Enter a From Date to indicate the date from which the rate is available for use. Optionally, select a To Date.
6. Repeat this process for each person or person, assignment, and organization combination for which you want to enter rates.
7. Click Save.

Creating Resource Class Rate Schedules
Define rates or percentage markups by resource class or a combination of resource class and organization.
You can assign resource class rate schedules to project plan types or financial plan types. The selected resource class rate schedule functions as a source of rates if the rates can’t be determined elsewhere.

Complete the following steps to create a resource rate schedule:

1. Click **Add Row** in the Resource Class Rates section.
2. Select the resource class for which you are entering rates.
3. Depending on the detail at which you want to enter rates, optionally select an **Organization**.
4. Enter either a rate or a markup percentage.
5. Enter a **From Date** to indicate the date from which the rate is available for use. Optionally, select a **To Date**.
6. Repeat this process for each resource class, or resource class and organization combination for which you want to enter rates.
7. Click **Save**.

Create Planning Resource Breakdown Structures

Create planning resource breakdown structures as a source for planning resources that are used for project planning, budgeting and forecasting. A default planning resource breakdown structure with planning resources is created automatically for the Labor, Equipment, Material Items, and Financial Resources resource classes for each project unit.

**Note:** When you create a project template, it’s selected as the primary planning resource breakdown structure. You can designate another planning resource breakdown structure as primary if required, but you can’t remove the default planning resource breakdown structure from the project or template.

The following figure illustrates the three-step guided process for setting up planning resource breakdown structures.
Entering Planning Resource Breakdown Structure Details

To create a planning resource breakdown structure:

1. Click Navigator > Setup and Maintenance, and search for the Manage Planning and Billing Resource Breakdown Structures task.
2. Click the Manage Planning and Billing Resource Breakdown Structures link.
   Use the Manage Planning and Billing Resource Breakdown Structures page to create new planning resource breakdown structures and to review existing planning and billing resource breakdown structures.
3. Click the Create icon in the Planning Resource Breakdown Structures section.
   Use the Create Planning Resource Breakdown Structure: Basic Information page to provide basic resource breakdown structure information including the name, active dates, and project unit.
4. Enter a planning resource breakdown structure name and select a date from which the resource breakdown structure is available for use.
5. Optionally, provide a description and a date to which the planning resource breakdown structure is available for use.
6. Select a project unit. Only projects created for the selected project unit can use this planning resource breakdown structure.
7. If you want to allow project managers to add planning resources at the project level, then select the Allow resource changes at project level check box.

   Tip: Changes at the project level don’t move back to the parent planning resource breakdown structure. Deselect this option to ensure all project using the planning resource breakdown structure use the same resources.
8. Optionally, select a Job Set as a source of jobs for creating planning resources on your planning resource breakdown structure.
9. Click Save.

Selecting Resource Formats

Resource formats are predefined resource types or hierarchies of resource types of up to three levels. The following figure provides examples of resource format hierarchies up to three levels.

![Resource Format Diagram](image-url)
You create resources for planning or billing resource breakdown structures based on resource formats. For example, if you want to plan for project-related expenses such as airfare, then you must select resource format hierarchies created using the resource type Expenditure Type.


   Use the Create Planning Resource Breakdown Structure: Select Resource Formats page to select the resource formats and resource format hierarchies to use for creating planning resources.

2. Click the **Include** check box for each resource format that you want to create planning resources for.

   **Tip:** Click the **Expand** icon to expand the resource format hierarchy. You must select lower levels of a hierarchy individually even if you have selected a format at a higher level.

3. Click **Save**.

### Adding Planning Resources

Create planning resources based on the resource formats you selected for the planning resource breakdown structure.


   Use the Create Planning Resource Breakdown Structure: Add Planning Resources page to create planning resources based on the selected resource format hierarchies.

2. In the Resource Formats table, select a resource format for which you want to create planning resources.

   **Tip:** Click the **Expand** icon to expand the resource format hierarchy if you want to create planning resources at a more detailed level.

3. Click **Add** in the Planning Resources section.

4. Enter a name for the planning resource.

5. In the **Resource Combination** column, select values for each resource element that is part of the selected resource format hierarchy. For example, if the selected resource format is **Job: Supplier**, then you must select values for Job and Supplier.

6. Review the resource class and change if required.

   **Note:** For each resource format, you can create planning resources based on certain resource classes. For example, if the resource format contains Job, then the only available resource class is Labor. However, if the resource format is Expenditure Category, then you can select any of the resource classes (Labor, Material Items, Equipment, and Financial Resources) when you create a resource.

7. Review the spread curve and make changes if required.

   Use predefined spread curves or create spread curves based on your requirements on the Manage Spread Curves page. Spread curves determine how quantity, cost, and revenue amounts for planning resources are distributed across periods in financial or project plans. The resource class associated with the planning resource determines the default spread curve.

8. Repeat this step for each planning resource you want to create for each resource format.

9. Click **Save**.
Create Project Types

Create project types to control basic project configuration options for burdening, billing, capitalization, and project categorization.

Project types are the primary classification for the projects your business manages. You must set up at least one project type to create projects.

**Note:** After you create a project using a project type, you can’t edit the project type.

The following sections describe how you create project types.

### Entering Basic Project Type Information

To create a project type:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Project Types** task.
2. Click the **Manage Project Types** link.
   
   Use the Manage Project Types page to view, create, and edit project types.
3. Click the **Create** icon to create a project type.
   
   Use the Create Project Type page to specify basic project configuration options, such as burdening, billing, and capitalization options, and class categories, that are inherited by each project associated with the project type.
4. Enter a project type name and select a date from which the project type is available for use. Optionally, select a date to which the project type is available for use and enter a description.
5. Select the **Set** to which the project type is assigned.

**Note:** Project managers can use this project type only on project templates and projects created in business units associated with the set you select here. For additional information about set assignments, see also the Create Financial Plan Types section of this document.

6. Select a **Work Type**.
   
   Create work types on the Manage Work Types page. Work types classify actual and scheduled work. Use work types to determine whether expenditure items are billable, classify cross-charge amounts into cost and revenue for cross-charge work, and calculate transfer price amounts.
7. To record burden costs on projects, select the **Enable burdening** check box.
8. To bill customers for project work, select the **Enable billing** check box.
9. To assign assets to projects, select the **Enable capitalization** check box.

### Selecting Burdening Options

Control how burden transactions are created and accounted. If you enable burdening for a project type, you can choose to account for the individual burden cost components or the total burdened cost amount.

1. Navigate to the Burdening Options tab.
2. Select the **Default Cost Burden Schedule** for projects that are defined with this project type. Project managers can change this value at the project or task level.
3. Select the **Allow cost burden schedule change for projects and tasks** check box to allow a change of the default cost burden schedule when creating and maintaining projects and tasks. Don’t enable this option if you want all projects of a project type to use the same schedule for internal costing.
4. The following table lists the decisions that you need to take for burden cost accounting.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include burden cost on same expenditure item</td>
<td>Decide if you want to include burden cost and raw cost amounts on the same expenditure item. You can store the total burdened cost amount as a value with the raw cost on each expenditure item.</td>
</tr>
<tr>
<td>Create expenditure items for burden cost components</td>
<td>Decide if you want to include burden cost amounts on the same expenditure item, but want to see the burden cost details. Expenditure items are created for each burden cost amount on an indirect project and task.</td>
</tr>
<tr>
<td>Project Name and Task Name</td>
<td>Determine the project, and optionally the task, that receives the burden cost expenditure items.</td>
</tr>
<tr>
<td>Create separate expenditure item for burden cost</td>
<td>Decide if you want to account for burden cost amounts as separate expenditure items on the same project and task as the raw cost.</td>
</tr>
<tr>
<td>Create burden cost accounting journal entries</td>
<td>Decide whether to create accounting entries for the burden costs.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you select this setting, a separate journal line is created for the burden amount rather than for the total burdened amount, which is the raw cost plus the burden cost. This journal line is created independent of the raw cost journal line. Deselect this check box if burden costs are calculated for reporting purposes only and you don't want to export burdened costs to the general ledger.</td>
</tr>
<tr>
<td>Create burdened cost accounting journal entries</td>
<td>Decide whether you want to create a separate journal line for the total burdened cost.</td>
</tr>
<tr>
<td></td>
<td><strong>Caution:</strong> The raw cost may be accounted twice if separate journal lines are created for the raw cost and for the total burdened cost. You can use this option to track the total burdened cost amount in a cost asset or cost work-in-progress account.</td>
</tr>
</tbody>
</table>

5. Click **Save**.

**Selecting Capitalization Options**

Configure capitalization options to determine the options that are inherited by each project associated with that project type.

1. Navigate to the Capitalization Options tab.
2. The following table lists the decisions you need to take in the Construction in Progress section.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Type</td>
<td>Decide whether to capitalize costs at the burdened or raw cost amount for projects with this project type.</td>
</tr>
<tr>
<td>Asset Line Grouping Method</td>
<td>Decide how asset lines must be summarized. You can select All, which is the highest level of summarization, or summarize by expenditure category or expenditure type.</td>
</tr>
<tr>
<td>Asset Cost Allocation Method</td>
<td>Decide if you want to automatically distribute indirect and common costs across multiple assets.</td>
</tr>
</tbody>
</table>
Selecting Classifications

Assign project classifications to group your projects according to categories and codes that you define on the Manage Class Categories page.

1. Navigate to the Classifications tab.
2. Click the Add Row icon.
3. Select a Class Category.
4. Select the Assign to all projects check box to automatically add the classification to the project definition for all new projects using this project type.
5. Repeat the process for each class category you want to add to the project type.
6. Click Save.

Project Control

Overview of Project Control Configuration

The following table lists the setup tasks for Oracle Fusion Project Control.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Period Profiles</td>
<td>Specify how time periods are grouped and displayed when editing budgets, forecasts, and project plan costs.</td>
</tr>
</tbody>
</table>
### Task Name | Description
--- | ---
Manage Spread Curves | Specify how quantity, cost, and revenue amounts are automatically distributed across a range of accounting or project accounting periods.
Manage Resource Classes: Spread Curves | Review and update resource classes to specify the spread curve to be used.
Manage Financial Plan Types | Specify options used to control planning scenarios for budget and forecast versions.
Manage Project Plan Types | Specify default planning options that cascade down to the template and project levels.

This chapter provides detailed setup steps for the following required tasks:

- Manage Financial Plan Types
- Manage Project Plan Types

## Create Financial Plan Types

Create financial plan types to define default information and planning options for creating different types of budgets or forecasts.

Create any number of financial plan types based on company requirements as illustrated in the following figure. For example, if your organization has stringent financial planning and oversight requirements, you can create separate financial plan types for each planning scenario. Alternatively, you may create only a few financial plan types, for example, for approved budgets and primary forecasts.
The following graphic illustrates how you can have multiple financial plan types for your projects. The financial plan types can be approved cost budget, primary revenue forecast, and estimate and so on. The versions can be working, submitted, approved, baseline and so on.

The following sections describe how to create financial plan types.

**Entering Basic Information and Setup Options**

To create a financial plan type:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Financial Plan Types** task.
2. Click the **Manage Financial Plan Types** link.

   Use the Manage Financial Plan Types page to create, review, edit, or delete existing financial plan types.

3. Click the **Create** icon to open the Create Financial Plan Type page.
Use the Create Financial Plan Type page to enter basic financial plan type information, and setup and planning options that determine how associated financial plan versions are created.

4. Enter a unique financial plan type name and select a date from which the financial plan type is available for use.
5. Optionally, provide a description and a date to which the financial plan type is available for use.
6. Use the Plan Class list to determine whether project managers will use the financial plan type to create budget versions or forecast versions.
7. Use the Planning Amounts list to determine whether associated financial plan versions will contain cost amounts, revenue amounts, or both.

If you want to create a financial plan type to plan for both cost and revenue, indicate whether one version will contain both amounts, or if project managers must select to include either cost or revenue amounts when creating a budget or forecast version.

8. Select setup options depending on whether you’re creating a financial plan type of the Budget or Forecast plan class.

If you’re creating a financial plan type of the Budget plan class, make decisions as listed in the following table.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designate as approved cost budget</td>
<td>Is the financial plan type an approved budget?</td>
<td>Decide whether the financial plan type will create cost and revenue versions used for plan comparison or project performance reporting.</td>
</tr>
<tr>
<td>Designate as approved revenue budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designate as award budget</td>
<td>Will you use the financial plan type to create budgets for sponsored projects?</td>
<td>Select this option if the financial plan type will create control budgets for sponsored projects.</td>
</tr>
<tr>
<td>Use workflow for status changes</td>
<td>Will you use an approval workflow?</td>
<td>Use workflow to trigger notifications when project managers change the version status or submit a request to change the version status.</td>
</tr>
<tr>
<td>Set as default financial plan type</td>
<td>Do you want the financial plan type to be the default selection?</td>
<td>Set the financial plan type as the default, if for example, you anticipate it to be the most commonly used for creating budget versions.</td>
</tr>
<tr>
<td>Set as default award financial plan type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enable planning in multiple transaction currencies</td>
<td>Will project managers enter amounts in multiple currencies?</td>
<td>Decide whether project managers can enter amounts in currencies other than the project currency.</td>
</tr>
</tbody>
</table>

**Note:** To use transaction currencies, you must define currency attributes on the Currency Settings tab.

| Enable budgetary controls | Will you create control budgets with the financial plan type? | Decide whether the financial plan type will create cost budget versions that create control budgets in Oracle Fusion Budgetary Control. |
If you’re creating a financial plan type of the **Forecast** plan class, make parallel decisions for the following attributes:

- Designate as primary cost forecast
- Designate as primary revenue forecast
- Use workflow for status changes
- Set as default financial plan type

The following table lists a few more decisions that you need to take when creating a financial plan type of the **Forecast** plan class.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically submit forecasts for approval</td>
<td>Can forecasts be automatically submitted for approval?</td>
<td>Automatic submission for approval applies only to primary forecasts. When the project manager creates the first baseline version for the approved budget, the application creates the primary forecast version and submits it for approval.</td>
</tr>
<tr>
<td>Automatically approve forecasts</td>
<td>Can project managers directly approve forecasts?</td>
<td>If you don’t use workflow for forecast approvals, decide if project managers can approve forecast versions directly (without first submitting them to an approver).</td>
</tr>
</tbody>
</table>

**Tip:** The automatically approve forecasts option applies even if project managers aren’t entitled to approve forecasts. So, use it to enable automatic approval for certain financial plan types while controlling the forecast approval entitlement for others.

**Assigning Sets**

You associate one or more sets with financial or project plan types so that project managers can use them to create financial plans (budget or forecast versions) for projects or project templates. Financial plan types are available for selection only when projects or project templates are created for project units linked to selected sets.

The following figure illustrates an example of set assignments. The Consulting Services set is associated only with the Consulting Services project unit. You associate the financial plan type Consulting Bid only with the Consulting Services set.
In this case, only project managers who create projects for Consulting Services can create versions of the Consulting Bid financial plan type.

If you associate the Internal Services Set to the Consulting Bid financial plan type, then project managers from the Internal Services project unit can also access that financial plan type.

Tip: To make financial plan types available more widely across your organization, you can assign them to a common set.

To assign sets:

1. Navigate to the Set Assignments tab.
2. Click the Add Row icon to add a set assignment.
4. Repeat the process for each set to which the financial plan type is assigned.
5. Click Save.
Specify Plan Settings
Use the Plan Settings tab to specify the cost and revenue amounts to include in budget or forecast versions, level of detail for planning, calendar and period options, and rate derivation options.

1. Navigate to the Plan Settings tab.
2. The following table lists the decisions you need to take related to the amount types that are available for editing on budget and forecast versions and how they are edited and displayed.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Types</td>
<td>What measures can project managers plan for on a budget or forecast?</td>
<td>Decide whether to plan for quantities, amounts, and rates. When selected, corresponding fields are editable on the Edit Budget and Edit Forecast pages. For example, when creating a financial plan type for internal projects that don't track cost amounts, project managers can select quantity and deselect cost and rates.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip</strong>: If you're planning for cost and revenue, select the <strong>Use cost plan options for revenue</strong> check box to replicate your cost selections to revenue. Note that this check box applies to current changes only. If you update cost options later, you must select the check box again to copy.</td>
</tr>
<tr>
<td>Planning Level</td>
<td>What measures can project managers plan for on a budget or forecast?</td>
<td>Determine the level of the task structure at which project managers will enter budget or forecast amounts. For example, create one financial plan type for capturing detail cost amounts at the lowest task level, another to capture summary cost amounts at the top task level, and a third to capture total revenue amounts at the project level.</td>
</tr>
<tr>
<td></td>
<td>At what level of the task hierarchy will project managers plan?</td>
<td></td>
</tr>
<tr>
<td>Calendar Type</td>
<td>Will project managers plan by period or for duration of plan lines?</td>
<td>Decide whether to plan for the duration of budget or forecast lines or to plan for specific periods in the accounting calendar or project accounting calendar.</td>
</tr>
<tr>
<td>Calendar Type</td>
<td>Will you use the financial plan type to create control budgets for sponsored projects?</td>
<td>Select the <strong>Award Calendar</strong> calendar type if you will use the financial plan type to create control budgets for sponsored projects. This calendar type creates the calendar for control budgets based on the budget periods defined for the award.</td>
</tr>
</tbody>
</table>
### Option Name: Calendar Type
Will you use the financial plan type to create control budgets for nonsponsored projects?

Select either the **Accounting Calendar** or **Project Accounting Calendar**, or **None** as the calendar type if you will use the financial plan type to create control budgets for nonsponsored projects.

These calendar types create calendars for control budgets by using the accounting period or project accounting period.

If you select **None** as the calendar type, then either the project duration or the maximum task assignment duration is used to create calendars for control budgets.

### Option Name: Period Profile
How will period amounts be displayed?

If project managers enter planning amounts by period, select how the periods are grouped for display when editing budget or forecast versions.

Use predefined period profiles or create period profiles based on your requirements on the Manage Period Profiles page.

---

## Selecting Currency Settings and Rate Settings

Use the Currency Settings tab to select transaction currencies in which to enter financial plan amounts, and the rates for converting those amounts to project currency or project ledger currency.

1. Navigate to the Currency Settings tab.
2. Click the **Add Row** button on the Transaction Currencies subtab to add a transaction currency.
3. Select the desired currency in the **Currency** field.
4. Repeat the process for each transaction currency that project managers can use.
5. Click **Save**.
6. Click the **Project Currency** subtab.

   Use the Project Currency subtab to define how the application must convert transaction currency amounts to project currency. If the financial plan type supports planning for cost and revenue, you must provide currency conversion attributes separately for cost and revenue.

7. Select a **Rate Type** as a source of conversion rates.
8. Select a **Rate Date** to determine whether conversion rates are derived based on the start or end date of plan lines or a fixed date.
9. If the rate date is **Fixed Date**, then enter the date from which conversion rates will be used in the **Fixed Date** field.
10. Click **Save**.
11. Click the **Project Ledger Currency** subtab.

   Use the Project Ledger Currency subtab to define how the application must convert transaction currency amounts to project ledger currency. Repeat steps as defined for project currency.

12. Click **Save**.

Use the Rate Settings tab to specify the actual or planning rates used to calculate cost and revenue amounts on associated budget or forecast versions.
Note: If the financial plan type supports planning for cost and revenue, you specify rate settings separately for cost and revenue.

1. Navigate to the Rate Settings tab.
2. Click Add Row in the Rate Schedules section to specify rate settings for a business unit. You must specify rate settings separately for each business unit.
3. Determine if project managers will use the same rate schedules defined for the project to calculate actual costs, or use separate rate schedules for planning purposes.
4. To use actual rates, deselect the Use planning rates check box. In the Details section, optionally select rate schedules for Resource Class Raw Cost Rate and Resource Class Bill Rate.

If the application is unable to determine cost or bill rates for a planning resource, then it uses the resource class rates schedules you specify here.

5. To use planning rates, select the Use planning rates check box. In the Details section, select separate rates for Person, Job, Nonlabor Resource, and Resource Class, as required. You can also select a burden schedule to use for calculating burdened costs for all planning resources (including those that aren’t rate-based).
6. Repeat the process for each business unit for which you want to select rates.
7. Click Save.

Selecting Budgetary Control Settings

Use the Budgetary Control Settings tab to define the control budgets that you can create. Control budgets are automatically created in Oracle Fusion Budgetary Control when you create the baseline version of a project budget that is enabled for budgetary control.

Caution: The financial plan type must be enabled for budgetary controls for the Budgetary Control Settings tab to be available.

1. Navigate to the Budgetary Control Settings tab.
2. The following table lists the decisions you need to take for the project and top resource control budgets.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control Budget</td>
<td>Will you enter budgetary control amounts at the project level or top resource level of the project?</td>
<td>Decide whether to enter amounts in the budget version at the project level or top resource level. These amounts are passed to the control budget, and Oracle Fusion Budgetary Control uses the project and top resource level budget data to create control budget account segments.</td>
</tr>
<tr>
<td>Control Level</td>
<td>How strictly do you want to control the funds that are reserved for expenditures that impact the control budget?</td>
<td>Select a control level for the project and top resource control budgets. The options are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Absolute</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Advisory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Track</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Do Not Create Control Budget</td>
</tr>
<tr>
<td>Default Rate Type</td>
<td>Which rate type will convert the transaction amount to the control budget currency prior to the funds check?</td>
<td>Select a default rate type to use on control budgets that are created from this financial</td>
</tr>
</tbody>
</table>
Selecting Generation Options

Use the Generation Options tab to indicate how cost and revenue are calculated when you generate a budget or forecast version from another financial plan or from the project plan.

Perform the following actions if you’re creating a financial plan type of the Budget plan class.

1. Navigate to the Generation Options tab.
2. Select a Generation Source to determine whether budget versions must be generated from another financial plan or from the project plan.
3. If you selected Financial plan type as the generation source, select a Source Plan Type to indicate which financial plan type the source plan must belong to.
   - If your generation source is Project plan type, then you can select either Working or Baseline.
   - If your generation source is Financial plan type and your source plan type is a budget financial plan type, then you can select Current baseline, Original baseline, or Current working.
   - If your generation source is Financial plan type and your source plan type is a forecast financial plan type, then you can select Current approved, Original approved, or Current working.
5. If the financial plan type supports planning for revenue, select a Revenue Generation Method. The following table describes the options.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual</td>
<td>Revenue amounts aren’t generated. Project managers can enter amounts manually.</td>
</tr>
<tr>
<td>Planning rate based</td>
<td>Revenue amounts are generated based on the planning rates you specify in the Rate Settings tab of the financial plan type.</td>
</tr>
<tr>
<td>Contract revenue classification method</td>
<td>Budget revenue is generated line by line, using the revenue method classification on the revenue plan associated with the contract line. The contract line revenue method classifications determines if revenue rates, bill rates, or contract line funding amounts are used to derive budget revenue.</td>
</tr>
</tbody>
</table>

6. Select the Retain manually added budget lines check box if plan lines added by project managers must be retained when an existing version is generated again.
7. Select the Retain override rates from source check box if override rates entered in the source plan version must be used to generate amounts in the new budget version.
8. Click **Save**.
If you’re creating a financial plan type of the Forecast plan class, in addition to the decisions listed for budget financial plan types, you must also determine the following:

1. The following table lists the **Forecast ETC Method** that you can use to determine how ETC amounts are calculated. Select one of the options.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Resulting Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remaining plan</td>
<td>ETC = Plan - Actual</td>
</tr>
<tr>
<td>Plan to complete</td>
<td>ETC = Plan - Actual ETC = Plan * (1 - Physical Percent Complete from latest Published Progress)</td>
</tr>
<tr>
<td>Cost performance index based</td>
<td>ETC = (1 - Physical Percent Complete) / Physical Percent Complete * Actual</td>
</tr>
</tbody>
</table>

**Note:** If either the physical percent complete or actual amounts are zero, then the **Plan to complete method** is used.

| Manual entry                    | ETC amounts not calculated                                                            |

2. If you’re using the **Remaining plan** ETC method, then select the **Carry forward unused amounts from past periods** check box to carry over unused source plan amounts from periods prior to the actual amounts through period.

3. Select one of the following options for the **Actual Amounts Through Period** field to determine the period through which to obtain actual amounts when generating forecast amounts:
   - Current period
   - Prior period
   - Last closed period

4. Select the **Allow negative ETC calculation** check box if you don’t want negative results of ETC calculation to be set to zero.

5. Select the **Open commitments** check box to include commitments such as purchase orders and supplier invoices in the project forecast.

6. Click **Save**.

### Selecting Reporting Options, Export Options, and Additional Information

Use the Reporting Options tab to indicate how to roll up amounts for planning resources, report quantity when planning for cost and revenue in separate financial plan versions, calculate margins, and display amounts. Make decisions as listed in the following table:

The following table lists the decisions you need to take while setting up reporting options for your project.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Quantity</td>
<td>What quantity will be used for reporting?</td>
<td>If the financial plan type supports planning for cost and revenue in separate plan versions,</td>
</tr>
</tbody>
</table>
Use the Export Options tab to determine the amounts, rates, and quantities that you can export to Excel. The following table lists the decisions you need to take:

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Cost</td>
<td>How will margin be calculated?</td>
<td>Decide whether to calculate margins based on raw cost or burdened cost.</td>
</tr>
<tr>
<td>Amount Scale</td>
<td>How will large amounts be displayed?</td>
<td>Decide how you want whole number amounts to display when project managers view quantities and amounts when reviewing and finalizing budgets or forecast versions. For example, select a rounding factor of 100 and a value of 25,000 is displayed as 250.</td>
</tr>
<tr>
<td>Currency Type</td>
<td>What currency will cost and revenue be displayed in?</td>
<td>Decide whether you want amounts to be displayed in project currency or project ledger currency.</td>
</tr>
</tbody>
</table>

Use the Export Options tab to determine the amounts, rates, and quantities that you can export to Excel. The following table lists the decisions you need to take:

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use task planned dates as task</td>
<td>Select the check box to display currency conversion attributes and costs</td>
<td>Note: This option is enabled if you select the Enable planning in multiple transaction currencies check box in the Budget or Forecast Options section.</td>
</tr>
<tr>
<td>assignment dates</td>
<td>and revenue in project currency and project ledger currency when you edit financial plan versions in Excel.</td>
<td></td>
</tr>
<tr>
<td>Display commitments</td>
<td>Select the check box to display commitment amounts in Excel.</td>
<td></td>
</tr>
<tr>
<td>Selected Measures</td>
<td>Use the Available Measures-Selected Measures select shuttle to determine what financial plan information you can review and edit in Excel.</td>
<td></td>
</tr>
</tbody>
</table>

Use the Additional Information tab to capture information specific to your organization. To enable data entry, configure the descriptive flexfield PJO_PLANNING_OPTIONS_DFF.

**Related Topics**

- Example of Set Association with Financial Plan Types
- How Financial Plan Types and Project Budget Versions Work With Budgetary Control
- How do I define the financial plan type to create an award project budget
- Considerations for Selecting Rate Schedules for Project and Financial Planning
Create Project Plan Types

Create project plan types to define default information used for creating a project plan and capturing progress.

Associate one project plan type to a project template. Projects created using the template inherit setup and planning option values. You can revise setup or planning options at each level to match specific planning requirements. The following figure shows how you can edit the setup or planning options at the project template or project level.

The following sections describe how to create project plan types.

**Entering Basic Information and Setup Options**

To create a project plan type:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Project Plan Types** task.
2. Click the **Manage Project Plan Types** link.

   Use the Manage Project Plan Types page to create, review, edit, or delete existing project plan types.
3. Click the **Create** icon to open the Create Project Plan Type page.
Use the Create Project Plan Type page to provide basic project plan type information and specify setup and planning options that determine how associated project plans and progress are created.

4. Enter a unique project plan type name and select a date from which the project plan type is available for use.
5. Optionally, provide a description and a date to which the project plan type is available for use.
6. Use the options in the Setup Options section to indicate whether:
   - Project managers can use Microsoft Project for scheduling.
   - Project managers can enter amounts in currencies other than the project currency.

   **Note**: When you select this option, you must provide currency conversion attributes in the Currency Settings tab.

### Assigning Sets and Specify Plan Settings

To assign sets and specify plan settings:

1. Navigate to the Set Assignments tab.

   Use the Set Assignments tab to associate sets with project plan types so that project managers can use them to create project plans for projects or project templates. For more information, see the Create Financial Plan Types section of this document.

2. Navigate to the Plan Settings tab.

   Use the Plan Settings tab to indicate whether you will track costs in the project plan and whether you will plan for the project duration or by periods.

3. The following table lists the decisions you need to take when assigning sets to your project:

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable project plan costs</td>
<td>Will project managers plan for costs on the project?</td>
<td>Enable project plan costs if project managers must plan for costs on tasks and task assignments and monitor actual costs through the project lifecycle.</td>
</tr>
<tr>
<td>Calendar Type</td>
<td>Will project managers plan by period or for duration of plan lines?</td>
<td>Decide whether project managers will plan for the task assignment duration or if they can plan for specific periods in the accounting calendar or project accounting calendar.</td>
</tr>
<tr>
<td>Rate Derivation Date Type</td>
<td>How will cost rates be determined?</td>
<td>If project managers won’t plan based on a calendar, determine whether cost rates are derived based on the start or end date of plan lines or a fixed date.</td>
</tr>
</tbody>
</table>
Specifying Task Settings

Use the Task Settings tab to specify task and task assignment date settings.

1. Navigate to the Task Settings tab.
2. The following table lists the ways in which you can enter and calculate the planned dates for tasks and task assignments.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use task planned dates as task assignment dates</td>
<td>Must task assignment dates match corresponding task planned dates?</td>
</tr>
<tr>
<td></td>
<td>If yes, then project managers can't edit task assignment dates.</td>
</tr>
<tr>
<td>Automatically roll up task planned dates</td>
<td>Must planned dates for lowest-level tasks roll up to summary tasks?</td>
</tr>
<tr>
<td></td>
<td>If yes, then project managers can't edit summary task dates.</td>
</tr>
</tbody>
</table>

⚠️ **Caution:** The **Use task planned dates as task assignment dates** check box and the **Automatically roll up task planned dates** check box are disabled if you enable use of Microsoft Project as the scheduling application.

3. The following table lists the options that you can use to enter transaction dates.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Synchronize task transaction dates with planned</td>
<td>Decide whether transaction dates must match the planned dates for tasks, plus or minus the date adjustment buffer.</td>
</tr>
<tr>
<td>dates</td>
<td>If you don’t select this check box, then transaction dates for summary tasks are blank by default. Transaction dates for subtasks are set to summary task transaction dates.</td>
</tr>
<tr>
<td>Date Adjustment Buffer in Days</td>
<td>Optionally, specify a date adjustment buffer to determine the maximum lag (positive) or lead (negative) time between task planned dates and task transaction dates.</td>
</tr>
</tbody>
</table>

4. Click **Save**.
Specifying Currency Settings and Rate Settings

Use the Currency Settings tab to select transaction currencies in which to enter project plan amounts, and the rates for converting those amounts to project currency or project ledger currency.

Use the Rate Settings tab to specify the actual or planning rates used to calculate cost and revenue amounts on the project plan.

For more information on both tabs, see the Create Financial Plan Types section of this document.

Specifying Progress Settings

Use the Progress Settings tab to define how progress values are calculated and roll up the task hierarchy. These options indicate default values that you can modify at the project level.

1. Navigate to the Progress Settings tab.
2. The following table lists the decisions you need to take on how the application should calculate physical percent complete values and rolls up task hierarchy.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Percent Complete Calculation Method</td>
<td>How is physical percent complete calculated for lowest-level tasks?</td>
<td>Decide whether project managers must enter physical percent complete or if the application calculates the value based on either cost or effort.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Calculation is based on the following formula, where amount can be cost or effort, as appropriate:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Actual Amount / Estimate at Completion (EAC) Amount * 100</td>
</tr>
<tr>
<td>Primary Physical Percent Complete Method</td>
<td>How does physical percent complete roll up the task hierarchy?</td>
<td>Decide whether the rolled-up physical percent complete for summary tasks is based on cost or effort.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Calculation is based on the following formula, where amount can be cost or effort, as appropriate:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sum of Earned Value Amount from Subtasks / Sum of Baseline Project Plan Amount * 100</td>
</tr>
</tbody>
</table>

3. Decide how ETC amounts are calculated as listed in the following table. The following table lists the ways in which you can calculate ETC amounts.
Option Name | Decision | Notes
--- | --- | ---
ETC Method | How are ETC amounts calculated? | Use one of the following methods to calculate ETC values:
◦ Remaining plan: For all progress calculations (initial and subsequent) ETC cost is calculated as: Current Planned Cost - Actual Cost
◦ Manual entry: For first progress as-of date, ETC cost is calculated as: Current Planned Cost - Actual Cost
For all subsequent progress as-of dates, ETC cost equals ETC cost from the previous published progress.

Allow negative ETC calculation | Can ETC values be negative or should they be set to zero? | If you are using the Remaining plan ETC method and actual amounts are greater than the plan, then you can select to display negative ETC amounts that result.

4. The following table lists the ways in which you can update the project plan information and generate a forecast version when publishing progress.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update planned quantity with EAC quantity</td>
<td>Decide whether planned quantity in the project plan is updated with EAC quantity from progress.</td>
</tr>
<tr>
<td>Automatically generate forecast version</td>
<td>Decide whether a forecast version is created when the project manager publishes progress.</td>
</tr>
<tr>
<td>Financial Plan Type</td>
<td>Select the financial plan type for use in forecast creation.</td>
</tr>
</tbody>
</table>

5. Click Save.

Selecting Budget Generation Options

Use the Budget Generation Options tab to decide whether a budget version is generated when you set a baseline for your project plan and to specify how the budget version is generated. These options indicate default values that you can modify at the project level.

1. Navigate to the Budget Generation Options tab.
2. The following table lists the decisions you need to take when choosing to generate a budget version while setting a baseline for a project plan.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate budget version</td>
<td>Decide whether a budget version is created when the project managers sets a baseline for the project plan.</td>
</tr>
<tr>
<td>Financial Plan Type</td>
<td>Select the financial plan type for use in budget creation.</td>
</tr>
<tr>
<td>Option Name</td>
<td>Decision</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Automatically designate budget version as baseline</td>
<td>Decide whether the budget version must be set as the current baseline version.</td>
</tr>
</tbody>
</table>

**Note:** If an existing current baseline budget version exists, then the existing version becomes a standard baseline version and the newly created baseline version becomes the current baseline version.

3. Click **Save**.

**Providing Additional Information**

Capture information specific to your organization using the descriptive flexfield PJO_PLANNING_OPTIONS_DFF.

**Project Costing**

**Overview of Project Costing Configuration**

The table lists the setup tasks for Oracle Fusion Project Costing with their grouping in task lists.

<table>
<thead>
<tr>
<th>Task List Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define General Costing Setup</td>
<td>Configure transaction sources, documents, profile options, and descriptive flexfields related to Oracle Fusion Project Costing functionality.</td>
</tr>
<tr>
<td>Define Capital Projects</td>
<td>Configure options used to capitalize project costs and place assets in service.</td>
</tr>
<tr>
<td>Define Borrowed and Lent Accounting</td>
<td>Configure borrowed and lent accounting to distribute project costs across organizations.</td>
</tr>
<tr>
<td>Define Project Costing Integrations</td>
<td>Configure options used to integrate Oracle Fusion Project Costing with other Oracle Fusion applications.</td>
</tr>
</tbody>
</table>

This chapter provides detailed setup steps for defining an additional segment for the cost collection flexfield.

See the Implementing Subledger Accounting guide for more details.

**Related Topics**

- Implementing Subledger Accounting guide
Set Up Default Budget Account

Before enabling an account based control budget for budgetary control, project application administrators must set up a default budget account for cost transactions. You can create a default budget account for transactions from various sources by:

1. Creating a transaction account definition
2. Associating the transaction account definition to your ledger

Creating a Transaction Account Definition

When you import a transaction into the Costs work area, the application derives the budget account using the account rule assignments that you define for your transaction account type in the transaction account definition. Perform the following steps to create a transaction account definition.

1. Click Navigator > Setup and Maintenance, and search for the Define Transaction Accounting for Project Financial Management task.
2. Click the Define Transaction Accounting for Project Financial Management link.
3. Click the Manage Transaction Account Definitions link. Set the scope to Project Costing if not already set.
4. The application provides the predefined transaction account definition PPM Default Account Generation Definition, which is selected by default. You can create a copy of this transaction account definition and configure it. To copy the definition, select Duplicate from the Actions menu.
5. Enter a name and short name for your transaction account definition. You can optionally select a chart of accounts.
6. Edit the account combination and segment rules according to your business needs. You can create new account combination and segment rules and associate them with your transaction account type.
7. Click Activate to activate your transaction account definition. Verify that the status changes from Incomplete to Active.
8. Click OK to close the confirmation message window.
9. Click Done.

Associating a Transaction Account Definition to a Ledger

Budgetary control uses the budget account to derive the budget amount for validating the transaction cost for your ledger. Perform the following steps to associate a transaction account definition to your ledger.

1. Click Navigator > Setup and Maintenance, and search for the Define Transaction Accounting for Project Financial Management task.
2. Click the Define Transaction Accounting for Project Financial Management link.
3. Click the Manage Subledger Accounting Options link. Set the scope to Project Costing if not already set.
4. Search for your ledger.
5. Expand the ledger in the Search Results table and select Project Costing.
6. Click Edit Accounting Options for Project Costing.
7. Select your transaction account definition from the list of values in the Transaction Account Definition field.
8. Click Save.

Related Topics

- Account Rules
- Transaction Account Builder
Define an Additional Segment in the Cost Collection Flexfield

The Cost Collection flexfield helps you to capture product-specific attributes on actual cost and commitment transactions. The Project Costing descriptive flexfield captures a complete set of transaction attributes in source applications and displays them in Oracle Fusion Project Costing. The Cost Collection flexfield is available for use on pages such as the Manage Unprocessed Costs page from where you can create transactions, and on the various Create Costs ADFdi Excel spreadsheets. It is also displayed on purchase orders, supplier invoice distributions, and expense reports in source applications.

To define an additional segment in the Cost Collection flexfield:

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Standard Cost Collection Flexfield task.
2. Click the Manage Project Standard Cost Collection Flexfield link.
3. Use the Manage Project Standard Cost Collection Flexfield page to manage context sensitive segments. Select the Project Costing Details flexfield row.
4. Click the Edit icon.
5. In the Context Sensitive Segments section, expand the Context list.
6. Select the context for which you want to add the additional segment in the flexfield and view the context sensitive segments. To view this newly added segment in Project Costing you must also add this segment to the PJC: All context.
7. Select a user-defined attribute row, such as USER_DEF_ATTRIBUTE1, to define the context sensitive segment.

☝️ Note: You must define context sensitive segments by using only the user-defined attributes and not reserved or other attributes, such as RESERVED_ATTRIBUTE1, EXPENDITURE_ITEM_DATE and so on.

8. Click Edit.
9. Use the Edit Segment page to specify the segment name, and define how it must be displayed and validated.

☝️ Note: User-defined attributes for this flexfield support only character data type, which includes alphabets and numbers. However, you cannot use negative numbers or numbers with decimal values.

10. Optionally specify a description.
11. Select the Enabled check box to enable this segment.
12. Depending on how the segment must appear, for example as a list, associate an existing value set or create a value set for Oracle Fusion Project Costing and associate the value set to the segment.
13. In the Validation section select a value set.
14. Optionally make this a required field by selecting the Required check box.

☝️ Note: To ensure that project attributes are entered for your transactions, you can mark the Project Number segment as a required field. This automatically makes the Task Number, Expenditure Type, Expenditure Organization, and Expenditure Item Date segments required for the context.

15. In the Initial Default section, specify the format of the default value for the segment, and the entity attribute from which the segment is derived.
16. In the Display Properties section, enter a value for Prompt which appears as the field label.
17. The Display Type field specifies how the segment appears. For example, you can specify the expense locations in a drop-down list.
Select a value for Display Type such as Check Box, List of Values, or Text Area.

18. On the Edit Segment page, click Save and Close.
19. On the Edit Context page, note the created segment name so you can identify it in the transactional pages.
20. Repeat steps 7 through 19 for every additional context in which the new segment must appear.
21. After you define all the flexfields, click Save and Close.
22. You must deploy the Cost Collection flexfield to make it available for users while entering transactions. Click the Deploy Flexfield button on the Manage Project Standard Cost Collection Flexfield page.
23. You can now verify the segment you defined using the Cost Collection flexfield by creating a transaction from either the Manage Unprocessed Costs page or the various Create Costs ADFdi Excel spreadsheets.

Customize the Project Costing Details Flexfield

You can customize the Project Costing Details flexfield by using the Manage Project Standard Cost Collection Flexfield setup task to cater to your business needs. For example, you can restrict expenditure types for specific expenditure organizations, derive project expenditure type based on purchase category, make the project-owning organization as your default expenditure organization, and so on.

Creating New Value Sets

1. Click Navigator > Setup and Maintenance, and search for the Manage Value Sets task.
2. Click the Manage Value Sets link.
3. Click Create in the Search Results section to create a new value set.
4. On the Create Value Set page, enter the Value Set Code, select Cost Collection as the Module, select Table as the Validation Type, and select Value Data Type as required.
5. In the Definition section, enter the table or view name in the FROM Clause field.
6. Enter the column you want to add in the Value Column Name field.
7. Enter your query criteria in the WHERE Clause field. To refer to an existing segment value, use the format: {SEGMENT.<segment column>}. For example, :{SEGMENT.EXPENDITURE_ITEM_DATE}. To refer to a parameter value, use the format: :{PARAMETER.<parameter name>}. For example, :{PARAMETER.PurchaseCategory}.
8. Click Save and Close.

Using Value Sets in Existing Segments

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Standard Cost Collection Flexfield task.
2. Click the Manage Project Standard Cost Collection Flexfield link.
3. On the Manage Project Standard Cost Collection Flexfield page, verify that the Project Costing Details flexfield row is selected in the Search Results table, and click Edit.
4. On the Manage Project Standard Cost Collection Flexfield page, click Manage Contexts.
5. On the Manage Contexts page, select your context code in the Context Code field and click Search. For example, EXM: Expense Report Line, POR: Requisition, and so on.
6. Select your context in the Search Results table and click Edit.
7. On the Edit Context page, select the segment row in the Context Sensitive Segments section for which you want to use the new value set and click Edit.
8. On the Edit Segment page, select the new value set for the Value Set field in the Validation section.
9. If your value set returns only a single value then that value is used as the default value for that segment. If your value set returns multiple values then you must explicitly set a default value using the Initial Default section.
10. Click Save and Close.
11. Click Save and Close.
12. Click Save and Close.
13. Click Save and Close.
14. On the Manage Project Standard Cost Collection Flexfield page, select the Project Costing Details row in the Search Results section.
15. Click Deploy Flexfield.
16. Monitor the deployment and click OK to dismiss the confirmation window after the deployment is complete.
17. Verify that the Deployment Status changes to Deployed.
18. Sign out of the application and sign in to activate the changes.

Customizing Segments to Limit List of Values
To conditionally control the list of values returned by a field based on the value selected for a previous field, you can change the order of the segments in the flexfield to create a master-child relationship between two segments. For example, if you want the tasks list of values to be controlled by the expenditure item date, then move the EXPENDITURE_ITEM_DATE segment immediately before the TASK_ID segment, edit the query criteria for the value set of the TASK_ID segment, and redeploy the flexfield.

Set Project-Owning Organization as the Default Expenditure Organization on Payables Invoices
This example demonstrates how project application administrators can set the project-owning organization of a project to be the default expenditure organization on an invoice line.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>For which expenditure organizations can I create invoice lines?</td>
<td>Only those expenditure organizations that are also project-owning organizations.</td>
</tr>
<tr>
<td>Can I set a default value for the expenditure organization of my cost transaction?</td>
<td>Yes, by using the project-owning organization to be the default expenditure organization.</td>
</tr>
</tbody>
</table>

Summary of Tasks
To set the project-owning organization as the default expenditure organization on invoices, project application administrators must:

1. Create a value set.
2. Use the value set in the invoice line.
3. Use the value set in the invoice distribution.
4. Deploy the updated Project Costing Details flexfield.

Creating a Value Set
1. Click Navigator > Setup and Maintenance, and search for the Manage Value Sets task.
2. Click the Manage Value Sets link.
3. On the Manage Value Sets page, click Create in the Search Results section to create a new value set.
4. On the Create Value Set page, enter the following values. The following table lists the values that you need to enter on the Create Value Set page.
5. In the Definition section, enter the following values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FROM Clause</td>
<td>PJF_.ORGANIZATIONS_.EXPEND_V</td>
</tr>
<tr>
<td>Value Column Name</td>
<td>NAME</td>
</tr>
<tr>
<td>ID Column Name</td>
<td>ORGANIZATION_ID</td>
</tr>
<tr>
<td>WHERE Clause</td>
<td>org_id : {PARAMETER. BusinessUnit} and nvl({SEGMENT. EXPENDUREITEM_DATE} trunc(sysdate)) between nvl(EFFECTIVE_START_DATE nvl({SEGMENT. EXPENDUREITEM_DATE} trunc(sysdate))) and nvl(EFFECTIVE_END_DATE nvl({SEGMENT. EXPENDUREITEM_DATE} trunc(sysdate))) and organization_id = (select carrying_out_organization_id from pjf_ projects_all_b where project_id = : {SEGMENT. PROJECTID})</td>
</tr>
</tbody>
</table>

6. Click **Save and Close**.

Using the Value Set in the Invoice Line

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Project Standard Cost Collection Flexfield** task.
2. Click the **Manage Project Standard Cost Collection Flexfield** link.
3. On the Manage Project Standard Cost Collection Flexfield page, verify that the Project Costing Details flexfield row is selected in the Search Results table, and click **Edit**.
4. On the Manage Project Standard Cost Collection Flexfield page, in the Context Sensitive Segments section select **AP: Invoice Line** as the context.
5. Select the **ORGANIZATION_ID** row and click **Edit**.
6. On the Edit Segment page, select **PJC_DEFAULT_EXP_ORGANIZATION** as the value set in the Validation section.
7. Since the value set **PJC_DEFAULT_EXP_ORGANIZATION** returns a single value, that value is used as the default value of the expenditure organization. You don't have to specify a default value using the Initial Default section on the Edit Segment page.
8. Click **Save and Close**.

Using the Value Set in the Invoice Distribution

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Project Standard Cost Collection Flexfield** task.
2. Click the Manage Project Standard Cost Collection Flexfield link.

3. On the Manage Project Standard Cost Collection Flexfield page, verify that the Project Costing Details flexfield row is selected in the Search Results table, and click Edit.


5. Select the ORGANIZATION_ID row and click Edit.

6. On the Edit Segment page, select PJC_DEFAULT_EXP_ORGANIZATION as the value set in the Validation section.

7. Since the value set PJC_DEFAULT_EXP_ORGANIZATION returns a single value, that value is used as the default value of the expenditure organization. You don’t have to specify a default value using the Initial Default section on the Edit Segment page.

8. Click Save and Close.

Deploying the Project Costing Details Flexfield

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Standard Cost Collection Flexfield task.

2. Click the Manage Project Standard Cost Collection Flexfield link.

3. On the Manage Project Standard Cost Collection Flexfield page, select the Project Costing Details row in the Search Results section.

4. Click Deploy Flexfield.

5. Monitor the deployment and click OK to dismiss the confirmation window after the deployment is complete.

6. Verify that the Deployment Status changes to Deployed.

7. Sign Out of the application and Sign In to activate the changes.

Payables specialists can now view the project-owning organization as the default expenditure organization while creating invoice lines.

Allow Employees to Enter Expenses for Active Tasks Only

This example demonstrates how project application administrators can limit the list of values for Task Number field on an expense item to allow employees to enter expenses for only those project tasks which are currently active, that is, the expenditure item date is within the task start and finish dates.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>For which project tasks can I enter time?</td>
<td>Only those project tasks for which the expenditure item date lies within the task start and finish dates.</td>
</tr>
<tr>
<td>How can I select the project tasks for which I want to enter time?</td>
<td>Using the Task Number list of values field on the Create Expense Item page.</td>
</tr>
</tbody>
</table>

Summary of Tasks

To limit the number of tasks in the Task Number list of values on an expense item, project application administrators must:

1. Create a value set.
2. Use the value set in the expense report line.
3. Deploy the updated Project Costing Details flexfield.
Creating a Value Set

1. Click Navigator > Setup and Maintenance, and search for the Manage Value Sets task.
2. Click the Manage Value Sets link.
3. Click Create in the Search Results section to create a new value set.
4. The following table lists the values you need to enter on the Create Value Set page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value Set Code</td>
<td>MY_PROJECT_TASK_EXPENSE</td>
</tr>
<tr>
<td>Description</td>
<td>Value set to display only active tasks.</td>
</tr>
<tr>
<td>Module</td>
<td>Cost Collection</td>
</tr>
<tr>
<td>Validation Type</td>
<td>Table</td>
</tr>
<tr>
<td>Value Data Type</td>
<td>Character</td>
</tr>
</tbody>
</table>

5. The following table lists the values you need to enter in the Definition section.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FROM Clause</td>
<td>PJC_TASKS_CCW_V</td>
</tr>
<tr>
<td>Value Column Name</td>
<td>TASK_NUMBER</td>
</tr>
<tr>
<td>Description Column Name</td>
<td>TASK_NAME</td>
</tr>
<tr>
<td>ID Column Name</td>
<td>TASK_ID</td>
</tr>
<tr>
<td>WHERE Clause</td>
<td>expenditure_org_id = :{PARAMETER. BusinessUnit} and project_id = :{SEGMENT.PROJECTID} AND NVL(START_DATE({PARAMETER. EIDate})) &lt; ({PARAMETER. EIDate}) AND NVL(COMPLETION_DATE({PARAMETER. EIDate})) &gt; ({PARAMETER. EIDate})</td>
</tr>
<tr>
<td>ORDER BY Clause</td>
<td>TASK_NUMBER</td>
</tr>
</tbody>
</table>

6. Click Save and Close.

Using the Value Set in the Expense Report Line

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Standard Cost Collection Flexfield task.
2. Click the Manage Project Standard Cost Collection Flexfield link.
3. On the Manage Project Standard Cost Collection Flexfield page, verify that the Project Costing Details flexfield row is selected in the Search Results table, and click Edit.
4. On the Manage Project Standard Cost Collection Flexfield page, click Manage Contexts.
6. Verify that the EXM: Expense Report row is selected in the Search Results table and click Edit.
8. On the Edit Segment page, select MY_PROJECT_TASK_EXPENSE as the value set in the Validation section.
9. Click Save and Close.

Deploying the Project Costing Details Flexfield
1. Click Navigator > Setup and Maintenance, and search for the Manage Project Standard Cost Collection Flexfield task.
2. Click the Manage Project Standard Cost Collection Flexfield link.
3. On the Manage Project Standard Cost Collection Flexfield page, select the Project Costing Details row in the Search Results section.
4. Click Deploy Flexfield.
5. Monitor the deployment and click OK to dismiss the confirmation window after the deployment is complete.
6. Verify that the Deployment Status changes to Deployed.
7. Sign out of the application and sign in to activate the changes. Employees can now view only active project tasks in the Task Number field after they select a value for the Project Number field while creating expense items.

Enable Team Members to Enter Project Time
Use delivered objects to enable the team members of financial projects to enter project time. Alternatively, you can create your own objects.

Your Time and Labor manager or administrator must set up the following to enable the project team members to enter time:

- User group
- Time entry profile
- Time processing profile

Creating a User Group
You can either use the delivered Projects Usage user group or use the following process to create your own group:
1. Click Navigator > Setup and Maintenance, and search for the Manage HCM Groups task.
2. Click the Manage HCM Groups link.
3. Click the Create icon on the toolbar of the Search Results table.
4. On the Create Group page, enter the group name and other details.
5. Click Save and Close.

Updating a User Group
Update an existing user group so that new project team members can enter time for their assigned projects.
1. Click Navigator > Setup and Maintenance, and search for the Manage HCM Groups task.
2. Click the Manage HCM Groups link.
3. Search for the user group that you want to update.
4. Select the user group in the Search Results table and click Refresh Group Membership on the table toolbar.
5. Click Submit on the Refresh Group Membership process page.
6. Note the process ID in the confirmation message and click OK to close the confirmation window.
7. On the Manage HCM Groups page, select your user group and click View Evaluation Status.
8. Search for the process ID of the process you submitted and verify that the Processing Status of your process is Completed Successfully. If the processing status is different, then click Search again to refresh the Search Results table.

Creating a Time Entry Profile
You create a time entry profile for project team members so that they can enter time only for the projects to which they’re assigned.

1. Click Navigator > Setup and Maintenance, and search for the Manage Worker Time Entry Profiles task.
2. Click the Manage Worker Time Entry Profiles link.
3. Click the Create icon on the toolbar of the Search Results table.
4. On the Create Worker Time Entry Setup Profile: Profile Values page, enter the profile name, description, and effective start date.
5. Select the layout set Projects Layout Set Filtered by Project Team Members.
6. Enable the entry actions as required in the Time Entry Actions Allowed table and enter appropriate values for the Days Before and Days After fields for these actions.
7. Click Next.
8. Click the Add icon on the toolbar of the Group Assignments section on the Create Worker Time Entry Setup Profile: Group Assignments page.
9. Select the user group for which you want to use this time entry profile in the Group Name field.
10. Click Next.
11. Click Move to Top in the Priority Order section on the Create Worker Time Entry Setup Profile: Profile Priority page to move your user group to the top.
12. Click Next.
13. Click Save and Close.

Creating a Time Processing Profile
You create a time processing profile for project team members so that they can enter time for only the projects to which they’re assigned.

1. Click Navigator > Setup and Maintenance, and search for the Manage Worker Time Entry Profiles task.
2. Click the Manage Worker Time Entry Profiles link.
3. Open the Setup and Maintenance work area, and go to the Manage Worker Time Processing Profiles task.
4. Click Create on the toolbar of the Search Results table.
5. On the Create Worker Time Processing Setup Profile: Profile Values page, enter the profile name, description, and effective start date.
6. In the Time Card Period field, select the value Projects and Payroll Weekly Starting Monday from the list.
7. In the Time Consumer Set field, select the value Projects and Payroll from the list.
8. Click Next.
9. Click Add on the toolbar of the Group Assignments section on the Create Worker Time Processing Setup Profile: Group Assignments page.
10. Select the user group for which you want to use this time processing profile in the Group Name field.
11. Click Next.
12. Click Move to Top in the Priority Order section on the Create Worker Time Processing Setup Profile: Profile Priority page to move your user group to the top.
13. Click Next.
14. Click Save and Close.

Project Billing
Overview of Project Billing Configuration

This table lists the setup task lists and tasks for Oracle Fusion Project Billing.

<table>
<thead>
<tr>
<th>Task or Task List Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Contracts Configuration for Project Billing</td>
<td>Define and manage setup related to project contracts including contract types and content that can be used consistently across contracts.</td>
</tr>
<tr>
<td>Define General Project Billing Setup</td>
<td>Enable project billing, manage the general project billing setup, and configure the project billing business unit options.</td>
</tr>
<tr>
<td>Define Internal Project Billing</td>
<td>Manage the project billing general setup, options, processing rules, transfer pricing, and extensions used for interproject and intercompany project billing.</td>
</tr>
<tr>
<td>Define Customer Billing Configuration for Project Billing</td>
<td>Define the configuration for processing transactions and related billing functions.</td>
</tr>
<tr>
<td>Define Transaction Taxes for Rapid Implementation</td>
<td>Configure tax setup according to local and international tax requirements.</td>
</tr>
</tbody>
</table>

This chapter provides detailed setup steps for the following required tasks:

- Manage Event Types
- Manage Revenue Methods
- Manage Invoice Methods
- Manage Invoice Formats

Create Event Types

Create event types to control whether events are used to invoice, recognize revenue, or perform both functions for contract lines. For example, you can create event types for invoice fees or to recognize revenue associated with milestones.

Event types can be used to derive the accounting in Oracle Fusion Subledger Accounting for event-based invoice and revenue accounting entries.

Optionally, you can add a tax classification code to an event type. Oracle Fusion Project Billing calculates the approximate tax amounts for events of this type on contract invoice lines.

The following section describes how you create event types.

Entering Basic Event Type Information

To create an event type:

1. Click Navigator > Setup and Maintenance, and search for the Manage Event Types task.
2. Click the Manage Event Types link.
   - Use the Manage Event Types page to create event types and to review, edit, or delete existing event types.
3. Click Add Row to create an event type.
4. Enter a unique name in the **Event Type** column. Optionally, provide a meaningful description.

5. Select a **Revenue Category** for reporting event-related revenue.

**Note:** Create revenue categories using the standard lookup PJF_REVENUE_CATEGORY before creating event types. You can update the lookup from the Manage Revenue Categories page or the Manage Standard Lookups page.

6. Select the **Revenue** check box if the current event type will be used for recognizing revenue.

7. Select the **Invoice** check box if the current event type will be used for invoicing.

8. Click **Save**.

### Specifying Tax Classification Codes

Associate tax classification codes with event types to enable calculation and display of approximate tax amounts in Oracle Fusion Project Billing before final tax figures are available in Oracle Fusion Receivables.

1. Click **Add Row** in the Tax Classification Code section.
2. Select a **Business Unit**.
3. Select a **Tax Classification Code**.
4. Click **Save**.

### Create Revenue Methods

Create revenue methods to determine how revenue amounts are calculated for contracts. The following sections describe how you create revenue methods.

### Entering Basic Revenue Method Information

To create a revenue method:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Revenue Methods** task.
2. Click the **Manage Revenue Methods** link.
   Use the Manage Revenue Methods page to create revenue methods and to review, edit, or delete revenue methods.
3. Click the **Create** icon to create a revenue method.
4. On the Create Revenue Method page, enter a revenue method name.
5. Specify a status. Select **Active** to make the revenue method available for use.
6. The following table lists the revenue method classifications from which you can select one to determine the basis for calculating revenue amounts for transactions on contracts or contract lines.

<table>
<thead>
<tr>
<th>Revenue Method Classification</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Based</td>
<td>Recognize revenue as billing events are completed.</td>
</tr>
<tr>
<td>As Billed</td>
<td>Recognize revenue as customers are invoiced, using a common set of bill rates, a burden schedule, or transfer pricing for both invoicing and revenue.</td>
</tr>
<tr>
<td>As Incurred</td>
<td>Recognize revenue as costs are incurred, using a revenue-specific set of bill rates, a burden schedule, or transfer pricing for both invoicing and revenue.</td>
</tr>
<tr>
<td>Percent Complete</td>
<td>Recognize revenue based on project progress of a contract line or associated project.</td>
</tr>
</tbody>
</table>
Revenue Method Classification | Description
--- | ---
| | When you select the Percent Complete revenue method classification, the Percent Complete billing extension is automatically added to the revenue method. The extension automatically creates a billing event with the percent spent revenue amount for a contract line, or for the project associated to the contract line.

Percent Spent | Recognize revenue as progress is calculated, based on actual cost to date over budget cost.

Rate Based | Recognize revenue as costs are incurred, using a revenue-specific set of bill rates, a burden schedule, or transfer price rates.

| | Use this revenue method classification if you are using a fixed price for invoices, or if you require different burden schedules for invoices and revenue. You can also use this revenue method classification if the invoice method classification for a bill plan on the same contract line is percent complete or percent spent.

**Note:** You can use a revenue method with the As Billed or As Incurred revenue method classification only when combined with an invoice method that has the Rate Based invoice method classification. In this situation, the bill rate, burden, or transfer price schedule type selected for that invoice method is used for both invoicing and revenue recognition.

7. To enable a revenue method for intercompany billing only, select the Use Revenue Method for Intercompany Billing check box. Use revenue methods with this option to track internal business activity between legal entities within your enterprise. Deselect the check box if the revenue method is used for billing external parties.

### Defining Rate Sources

If the revenue method classification is Rate Based, then you must select one of the following schedule types on the revenue method for both labor and nonlabor rates.

- Bill rate
- Burden rate
- Cost reimbursable
- Transfer price (available if you are using the revenue method for intercompany billing)

### Assigning Billing Extensions

Use the Billing Extension Assignment section to add a billing extension to a revenue method. In such a situation, contract lines that use revenue plans associated with the revenue method use the billing extension to calculate revenue amounts.

**Note:** You can’t assign client extensions to revenue or invoice methods when using the Oracle Fusion Project Billing Cloud Service.
Create Invoice Methods

Create invoice methods to determine how invoice amounts are calculated on contracts.

The following sections describe how you create invoice methods.

Entering Basic Invoice Method Information

To create an invoice method:

1. Click Navigator > Setup and Maintenance, and search for the Manage Invoice Methods task.
2. Click the Manage Invoice Methods link.

Use the Manage Invoice Methods page to create invoice methods and to review, edit, or delete invoice methods.

3. Click Create to create an invoice method.
4. On the Create Invoice Method page, enter an invoice method name.
5. Specify a status. Select Active to make the invoice method available for use.
6. The following table lists the invoice method classification from which you can choose one to determine the sources for invoice amount calculations on contracts or contract lines.

<table>
<thead>
<tr>
<th>Invoice Method Classification</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Based</td>
<td>Generate invoices as billing events are completed.</td>
</tr>
<tr>
<td>Percent Complete</td>
<td>Generate invoices based on project progress of a contract line or associated project.</td>
</tr>
<tr>
<td>Percent Spent</td>
<td>Generate invoices as progress is calculated, based on actual cost to date over budget cost.</td>
</tr>
<tr>
<td>Rate Based</td>
<td>Generate invoices as costs are incurred, using an invoice-specific set of bill rates, a burden schedule, or transfer price rates.</td>
</tr>
</tbody>
</table>

7. To enable an invoice method for intercompany billing only, select the Use Invoice Method for Intercompany Billing check box. Use invoice methods with this option to track internal business activity between legal entities within your enterprise. Deselect the check box if the invoice method is used for billing external parties.

Defining Rate Sources

If the invoice method classification is Rate Based, then you must select one of the following schedule types on the invoice method for the source of both labor and nonlabor rates.

- Bill rate
- Burden rate
- Cost reimbursable
- Transfer price (available if you are using the invoice method for intercompany billing)
Create Invoice Formats

Create invoice formats to determine how Oracle Fusion Project Billing creates invoice lines. Configure different invoice formats for labor, nonlabor, and event invoice line items, and specify if you want to use the format for customer invoices, internal invoices, or both.

Specify how to summarize expenditure items, and the fields you want an invoice line to display. You can configure the invoice formats to include free-form text on invoice lines.

The following sections describe how you create invoice formats.

Entering Invoice Format Header Information

To create an invoice format:

1. Click Navigator > Setup and Maintenance, and search for the Manage Invoice Formats task.
2. Click the Manage Invoice Formats link.
   Use the Manage Invoice Formats page to create new invoice formats and to review, edit, or delete existing invoice formats.
3. In the Invoice Format Header section, click the Add Row icon.
4. Enter a unique name for the invoice format.
5. Select a Format Type to determine whether the invoice format is used for labor, nonlabor, or events.
6. Select a date from which the information format is available for use. Optionally, select a date to which the invoice format is available.
7. Select a grouping option to determine the fields displayed on the invoice line and how they are grouped.
8. Select the Customer Invoice check box to use an invoice format for regular contract invoices. Similarly, select the Internal Invoice check box to use an invoice format for invoices generated by intercompany and interproject contracts.

   Tip: Select both check boxes if you want to use an invoice format for both customer and internal invoices. However, the list of values for the Field Name field in the Invoice Format Details section only includes values that are valid for both options.

9. Select the Fixed Format check box to prohibit distributions from being moved to other invoice lines.

   Note: You must select this check box if you select the Internal Invoice check box.

Entering Invoice Format Details

Use the Invoice Format Details section to select the fields you want to display.

1. In the Invoice Format Details section, click the Add Row icon.
2. Enter numeric values in the Start Position and End Position columns to specify where the text in the Field Name appears on an invoice line.
3. Select the Field Name that will appear on the invoice line.

   Note: The fields available for selection are determined by your selection of the Customer Invoice and Internal Invoice check boxes in the Invoice Format Header section.
4. If you want to replace the default field name for a selected field, enter the name you want to display on the invoice line in the Text column.
5. Select the Right Justify check box to justify the value of a field to the right, for example in the case of numeric values.
6. Click Save.
7. Repeat this process for each field you want to include on invoice lines.

## Project Performance Reporting

### Overview of Project Performance Reporting Setup

In the Define Project Performance Reporting Configuration activity, you configure reporting components for monitoring project performance.

The following table lists the setup tasks for Project Performance Reporting:

<table>
<thead>
<tr>
<th>Task List or Task Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Project Performance Reporting Configuration</td>
<td>Configure Project Performance Reporting to collect and review project data against defined performance areas.</td>
</tr>
<tr>
<td>Manage Project Unit Options: Performance Reporting Options</td>
<td>Specify settings and default values for project performance reporting and analytics within a project unit.</td>
</tr>
<tr>
<td>Define Key Performance Indicators</td>
<td>Manage project performance measures, key performance indicators, KPI categories, and status and trend indicators to track and view project performance.</td>
</tr>
<tr>
<td>Manage Status Indicators</td>
<td>Create indicators to convey the status and severity of performance for a measure and a performance category.</td>
</tr>
<tr>
<td>Manage Trend Indicators</td>
<td>Update the description and sort order of the status trend indicators.</td>
</tr>
<tr>
<td>Manage KPI Categories</td>
<td>Create additional categories to group key performance indicators and to track and view the overall performance of a project.</td>
</tr>
<tr>
<td>Manage Performance Measures</td>
<td>Enable predefined performance measures for summarization. Create custom measures to evaluate project performance using base measures or retrieve from third-party or legacy sources. Specify the related measures that are displayed with the performance measure in the KPI analysis region.</td>
</tr>
<tr>
<td>Manage Key Performance Indicators</td>
<td>Specify thresholds of possible values for a measure and associate them to status indicators.</td>
</tr>
<tr>
<td>Define Region Personalization</td>
<td>Configure region layouts and graph types on the project performance reporting dashboard.</td>
</tr>
<tr>
<td>Manage Region Layouts</td>
<td>Configure rows and measures within the region layouts.</td>
</tr>
<tr>
<td>Manage Cross Project Comparison Graph Types</td>
<td>Create and update graph types to control the display name, sort order, and contents of the cross-project comparison graph region.</td>
</tr>
</tbody>
</table>
This chapter provides detailed setup steps for the task Manage Key Performance Indicators.

Create Key Performance Indicators

Create key performance indicators (KPI) to measure how well your organization performs an operational, tactical, or strategic activity that is critical for the current and future success of the organization.

>Note: To create KPIs you must enable a project unit to track key performance indicators.

The following sections describe how to create key performance indicators.

Set Up KPI Categories

Create KPI categories for the project unit to use based on organizational requirements. KPIs are grouped into KPI categories based on performance areas. Examples are, cost, profitability, financial, and schedule. To create a KPI category:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage KPI Categories** task.
2. Click the **Manage KPI Categories** link.
3. Use the Manage KPI Categories page to define KPI categories that group KPIs belonging to a specific performance area.
4. Decide on what KPI categories your organization uses, such as cost, profitability, and financial.
5. Replace the **User-defined KPI category 4** KPI Category field with a KPI category name. Optionally add a description.
6. Select the KPI categories you want to **Enable for Use**.
7. Enter a **Start Date** to indicate the date from which the KPI category will be available for use. Optionally specify a **End Date**.
8. Click **Save and Close**.

Entering Basic KPI Information

To create a KPI:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Key Performance Indicators** task.
2. Click the **Manage Key Performance Indicators** link.
3. Use the Manage Key Performance Indicators page to search for, create, and edit KPIs.
4. Click the **Create** icon.
5. Use the Create Key Performance Indicator page to specify KPI details, trending information, and threshold levels.
6. The following table lists the information you need to provide in the General Information section.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Unit</td>
<td>For which project unit would you want this KPI to be available?</td>
<td>Projects you create in the project unit you select will be able to use the KPI you are creating.</td>
</tr>
<tr>
<td>KPI Name</td>
<td>What should the KPI name be?</td>
<td>Choose a name for the KPI based on the measure name you select and the name of the group or project this KPI will be used.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For example, your organization may use the same measure to create KPIs for different groups or projects. In such cases it is</td>
</tr>
<tr>
<td></td>
<td></td>
<td>recommended to give a specific meaningful name to the KPI. If you select the measure ITD budget margin (%), you can name the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>KPI Group 1 ITD Budget margin (%).</td>
</tr>
<tr>
<td>Measure</td>
<td>Which performance measure should you use?</td>
<td>You are creating a KPI to calculate the Inception-to-Date margin percentage for a project.</td>
</tr>
<tr>
<td>Measure Format</td>
<td>None</td>
<td>Populated automatically by the application based on the selected measure, such as percentage, hours, currency. The measure format</td>
</tr>
<tr>
<td></td>
<td></td>
<td>determines how you enter threshold values for the KPI.</td>
</tr>
<tr>
<td>KPI Category</td>
<td>What category does the KPI you selected fall into?</td>
<td>You create and enable up to five KPI categories such as cost, profitability, and effort on the Manage KPI Categories page.</td>
</tr>
<tr>
<td>Currency Type</td>
<td>Which currency type must the KPI use?</td>
<td>You can select either the project currency or the project ledger currency depending on what is enabled for the project unit you</td>
</tr>
<tr>
<td></td>
<td></td>
<td>selected.</td>
</tr>
<tr>
<td>Calendar Type</td>
<td>Which calendar type must the KPI use?</td>
<td>You can select either the accounting calendar or project accounting calendar depending on what is enabled for the project unit you</td>
</tr>
<tr>
<td></td>
<td></td>
<td>selected.</td>
</tr>
</tbody>
</table>

7. Optionally enter a description.
8. Enter a **From Date** to indicate the date from which the KPI to be available for use. Optionally specify a **To Date**.
9. Use the Trending section to specify if the current KPI values, project progress, and overall project health are better, worse, or the same as previous values.

10. The following table lists the information you need to provide:

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trend Indicator</td>
<td>Does an increase in the KPI value mean the trend is positive?</td>
<td>Specify if an increase or decrease in the value of the KPI you are creating is a positive or a negative thing for the performance of a project. For example, an increase in the ITD budget margin percentage is a positive trend in the project.</td>
</tr>
<tr>
<td>Tolerance Percentage</td>
<td>Should the application tolerate minor decrease in performance of a KPI when displaying the trend indicator?</td>
<td>Set a tolerance percentage to define how much of a change from the previous KPI value will be tolerated before the trend indicator changes to indicate worse performance. For example, you can specify that the application can tolerate up to 1% deviation for a decrease in ITD Budget Margin (%) from the previous value, before the trend indicator changes to depict that performance of the KPI is decreasing.</td>
</tr>
</tbody>
</table>

11. Use the Threshold Levels section to specify thresholds to indicate the health status of a KPI. Select one of the following options:

- Multiple threshold levels
- Single threshold level value
- Single threshold level range

**Note:** Information you enter in the following sections will vary based on whether the measure format of the KPI you are creating is percentage, currency, or hours. This procedure is based on a KPI with a currency measure format.

### Specifying Multiple Threshold Level Rules

The **Multiple threshold levels** option is selected by default. To add or modify multiple threshold levels:

1. Click **Add Row**.
2. Select a **Currency** and specify a **Decimal Display** in the Add Currency and Decimal Display secondary window.
3. Click **Save and Close**.
4. Click **Edit Threshold Levels**.
5. Enter the **Threshold Start** and **Threshold End** range relevant to the possible KPI values in the Edit Threshold Levels dialog box.
6. Select a **Status Indicator** which must be displayed when the KPI value falls in the range you specify.
7. Click **Save and Close**.
8. Add as many rows as required to set multiple thresholds with different currencies for the KPI.
9. Click **Save and Close** on the Create Key Performance Indicator page.
Specifying Single Threshold Level Value Rule

To specify a single threshold:

1. Select the Single threshold level value option.
2. Click Add Row.
3. Select a Currency and specify a Decimal Display in the Add Currency and Decimal Display secondary window.
4. Click Save and Close.
5. Click Edit Threshold Levels.
6. Enter the Threshold value.
7. Optionally change the Status Indicator to be displayed for the Greater than or equal to threshold and Less than threshold rows as relevant to the KPI value.
8. Click Save and Close.
9. Add as many rows as required to set multiple thresholds with different currencies for the KPI.
10. Click Save and Close on the Create Key Performance Indicator page.

Specifying Single Threshold Level Range Rule

To specify a single threshold level range rule:

1. Select the Single threshold level range option.
2. Click Add Row.
3. Select a Currency and specify a Decimal Display in the Add Currency and Decimal Display secondary window.
4. Click Save and Close.
5. Click Edit Threshold Levels.
6. Enter the Threshold Start and Threshold End range relevant to the possible KPI values in the Edit Threshold Levels dialog box.
7. Optionally change the Status Indicator to be displayed for the Within threshold range and Outside threshold range rows as relevant to the KPI value.
8. Click Save and Close.
9. Add as many rows as required to set multiple thresholds with different currencies for the KPI.
10. Click Save and Close on the Create Key Performance Indicator page.

Project Templates

Overview of Project Templates

This table lists the tasks included in the Define Project Templates task list.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Project Templates</td>
<td>Manage templates to quickly create projects that share common features, attributes, and options.</td>
</tr>
</tbody>
</table>
Create Project Templates

Project templates enable you to quickly create projects that share common features, attributes, and options.

To create a project template:

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Templates task.
2. Click the Manage Project Templates link.

Use the Manage Project Templates page to create project templates and to review or edit existing project templates. Create a project template based on an existing project template or project, or manually create a template.

3. To manually create a template, click Create Template.

Use the Create Project Template page to provide basic project template information including the business unit, project unit, and organization, and to select a project type and project space template.

4. Enter a Name and Number for the project template.
5. The following table lists the information you need to provide when creating project templates.

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Decision</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>What reference data do I want projects to access?</td>
<td>Selecting a business unit determines which rate schedules, project types, and invoice formats projects can use. It also determines the legal entity and which project and task owning organizations are available for projects.</td>
</tr>
<tr>
<td>Legal Entity</td>
<td>None</td>
<td>Populates automatically based on the business unit you selected. Change this if required.</td>
</tr>
<tr>
<td>Project Unit</td>
<td>What reference data do I want projects to access?</td>
<td>Selecting a project unit determines which class codes, financial and project plan types, project roles, and statuses projects can use. It also determines which transaction types are available for projects.</td>
</tr>
<tr>
<td>Organization</td>
<td>Which project and task owning organization to select?</td>
<td>Selecting a project and task owning organization are used for reporting, security, and accounting. It determines the default organization for the project, quick entry values, and allows transactions.</td>
</tr>
<tr>
<td>Project Type</td>
<td>What is the project type of the project?</td>
<td>Selecting a project type enables you to control basic project configuration options for burdening, billing, capitalization, and project categorization.</td>
</tr>
</tbody>
</table>

6. Select an Initial Project Status such as Requested.
7. Select a Project Space Template to provide an online location and collection of tools for teams to work more effectively together.

8. Enter a meaningful **Description** and click **Save and Continue** to navigate to the Edit Project Template page.

   Use the Edit Project Template page to review basic template information, access project, financial, and reporting options, and select quick entry fields.

9. In the Edit Project Template page, scroll down to the Quick Entries section.

   Use the Quick Entries section to specify the information that users enter when they create a project using this project template. Quick entry fields allow users to enter certain project information quickly.

10. Click **Add Row**.

11. Select a value in the Field Name column.

12. If you have selected **Classification** or **Team member** as the field name, then select a value in the Specification column.

   - Classification: Select the class category to use when creating the classification.
   - Team Member: Select the project role to use when creating the team member.

13. Enter a field label in the **Prompt** column.

14. Optionally make this a required field.

15. Scroll up to the Setup Options section.

   Use the Setup Options section to select which sections, such as basic information, financial options, and reporting options, are displayed in the project definition after the project is created.

16. Click **Save**.
Implement Project Execution Management Applications

Overview of Project Execution Management Implementation

To start an implementation of Project Execution Management, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt into the offerings applicable to your business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

Project Execution Management Offering

Use this offering to manage how you execute projects, track requirements, schedule and collaborate on tasks, staff resources, maximize utilization, resolve issues, and complete deliverables.

The following tables specify the primary functional areas of this offering. For the full lists of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering.

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users and Security</td>
<td>Enable users to perform functions related to their job roles. Configure user access to HCM data and functions.</td>
</tr>
<tr>
<td>Project Execution</td>
<td>Configure how you execute projects, manage requirements, schedule and collaborate on tasks, staff resources, maximize utilization, resolve issues, and complete deliverables. Define and manage project users, project roles, and calendars.</td>
</tr>
<tr>
<td>Project Resource Management</td>
<td>Indicate whether Oracle Fusion Project Resource Management will be deployed.</td>
</tr>
</tbody>
</table>

You can also configure applications using other tools. For more information, see the Oracle Applications Cloud Configuring and Extending Applications guide.

See the following guides for more details on project management implementation configuration.

- Securing ERP
- Using Functional Setup Manager
- Using Common Features
- Implementing Common Features
- Configuring and Extending Applications

Related Topics

- Securing ERP guide
Common Project Execution Options

Overview of Common Project Execution Options

In the Define Common Project Execution Options activity, you perform setup steps such as creating the project application administrator, project users, and roles, defining calendars, and creating project enterprise resources. This table lists the tasks and task lists that the setup tasks in the Define Common Project Execution Options activity are grouped into.

<table>
<thead>
<tr>
<th>Task or Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Project Implementation Administrator</td>
<td>Create or identify a project application administrator to manage and control access to Oracle Fusion Project Management applications.</td>
</tr>
<tr>
<td>Manage Project User Provisioning</td>
<td>Create and update project users and assign enterprise roles, such as Project Execution and Team Collaborator, to provide access to Oracle Fusion Project Portfolio Management applications.</td>
</tr>
<tr>
<td>Manage Project Roles</td>
<td>Create and update roles that are used to control access to project-level information and for defining project resource requests.</td>
</tr>
<tr>
<td>Define Project and Resource Calendars</td>
<td>Define calendars to assign to projects and resources to establish work schedules.</td>
</tr>
<tr>
<td>Manage Project Enterprise Resources</td>
<td>Create and update enterprise resources to assign to projects, tasks, issues, and deliverables.</td>
</tr>
</tbody>
</table>

Create Project Roles

You can set up specific roles and associate qualifications and keywords to each role. When a project manager requests a resource to fulfill this role on a project, the qualifications and keywords appear on the project resource request.

Note: Project manager and project team member are two predefined project roles that you can’t edit or delete as they have specific functions in a project.

Creating a Role

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Roles task.
2. Click the Manage Project Roles link.
3. On the Manage Project Roles page, click the **New** icon.
4. Enter a name for the role and click **Save**.
5. Click the **Show More** link.
6. In the Default Qualifications and Keywords section, click the **New** icon to add qualification and keywords for the role created.
7. Click **Save and Close**.

Create Calendars for Projects and Resources

You can create the elements that represent project schedules, which are used to define the project and resource calendars. Project and resource calendars define the standard working and nonworking time for projects and resources. Working times are the days and total hours in a calendar during which work can occur. Nonworking times in a calendar are days and total hours for which work should not be scheduled, such as weekends and holidays.

Calendar definition is shared across Oracle Fusion Applications. Project Execution Management applications provide a standard calendar of 8 hours per day, 5 days per week that you can assign to projects and resources.

In Oracle Fusion Project Resource Management, available capacity is calculated only for active project and resource calendars with a schedule type of Elapsed, one workday pattern of 7 days, and one project shift. When you set up calendars for Project Management and Project Resource Management, you can select only the Elapsed schedule type to use in project and resource calendars.

Schedules are used as a base for project and resource calendars in Project Execution Management applications. The smallest scheduling unit is a day. For example, you can define the number of hours in a day but, you can’t schedule work for a specific time of the day. The following are the elements of a schedule:

- Shifts
- Workday patterns
- Exceptions

Managing Shifts

A shift is a period of time, typically expressed in hours, that can be defined by a start and end time, or duration. Multiple shifts per day are not supported in Project Execution Management.

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Project Shifts** task.
2. Click the **Manage Project Shifts** link.
3. On the Manage Shifts page, click the **Create Shift** list.
4. Select **Create Elapsed Shift** from the list.
5. Enter name and duration for the selected shift and click **Save and Close**.
6. Click **Done**.

Managing Workday Patterns

A workday pattern is a collection of one or more shifts for a specific number of days. A pattern repeats itself for a date range to define the complete schedule.

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Project Workday Patterns** task.
2. Click the **Manage Project Workday Patterns** link.
3. On the Manage Workday Patterns page, click the **Create Workday Pattern** list.
4. Select **Create Elapsed Workday Pattern** from the list.
5. Enter name and days for the pattern. For example, if a workday pattern is a week, define the work pattern as 7 days.
6. In the Workday Pattern Details section, click the Add Row icon and enter the shift details. Note that if work is carried out on certain days of the week, for instance Monday to Friday, then work day pattern details will only be from day 1 through day 5.
7. Click Save and Close.
8. Click Done.

Managing Exceptions

Exceptions are deviations from a schedule. An example of a schedule exception is a public holiday falling on an otherwise working day or special working days created for normal nonworking days such as weekends.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Schedule Exceptions task.
2. Click the Manage Project Schedule Exceptions link.
3. On the Manage Schedule Exceptions page, click the Create Schedule Exception icon.
4. Enter the details for the exception and click Save and Close.
5. Click Done.

Managing Schedules

Schedules contain workday patterns and exceptions.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Schedules task.
2. Click the Manage Project Schedules link.
3. On the Manage Schedules page, click the Create Schedule list.
4. Select Create Elapsed Schedule from the list.
5. Enter the name and date range for the schedule. The start date of the schedule determines day 1 of the work pattern. For example, if you pick Monday, December 28, 2015 as the effective from date, then day 1 is a Monday. If you pick Friday, January 1, 2016 as the effective from date, then day 1 is a Friday.
6. In the Schedule Details section, enter details in each tab as applicable.
7. Click Save and Close.
8. Click Done.

Set Up Project Management Implementation Options

Specify the default calendar, currency, and full time equivalent hours. Also, specify the progress exception thresholds for the project enterprise.

Setting Up the Default Calendars

Calendars determine the standard working and nonworking time, such as weekends and holidays, for resources and projects. Select the default calendars to assign to resources and new projects.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Management Implementation Options task.
2. Click the Manage Project Management Implementation Options link.
3. On the Define Project Management Implementation Options page, in the Default Calendars section, select a value for default project and resource calendars.
4. Click Save and Close.
Entering Progress Exception Thresholds
Progress exceptions are generated when team members enter progress amounts for a proposed start date, finish date, or planned hours that exceed the defined thresholds. Define the threshold values for task progress in days and hours.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Management Implementation Options task.
2. Click the Manage Project Management Implementation Options link.
3. On the Define Project Management Implementation Options page, in the Progress Exceptions section, enter the days and hours.
4. Click Save and Close.

Setting Up a Default Currency
The currency defined is used when a project is created.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Management Implementation Options task.
2. Click the Manage Project Management Implementation Options link.
4. Click Save and Close.

Setting Up Default Full Time Equivalent Hours
Enter the full time equivalent (FTE) hours for resources that are used to calculate the labor demand FTE hours for reporting in the Project Hierarchy Dashboard and enterprise project structure. The default value is 520 hours.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Management Implementation Options task.
2. Click the Manage Project Management Implementation Options link.
3. On the Define Project Management Implementation Options page, in the Default Full Time Equivalent Hours section, enter hours.
4. Click Save and Close.

Create Project Enterprise Resources
Create project enterprise resources to assign to projects, tasks, issues, or deliverables. You can create labor and expense type resources to add to projects. You must be a project enterprise resource to access Project Execution Management applications. If you manage resource availability and staffing in Oracle Fusion Project Resource Management, you must create managed project enterprise labor resources to fulfill project resource requests.

This topic describes the manual procedure to create one project enterprise resource. However, you can create multiple project enterprise resources with Cloud interfaces, processes, or services. Follow this navigation path to open the Create Project Enterprise Resource window.

1. Click Navigator > Setup and Maintenance, and search for the Manage Project Enterprise Resources task.
2. Click the Manage Project Enterprise Resources link.

Creating a Labor Resource
A project enterprise labor resource is a resource that you can assign to multiple projects. A managed project enterprise labor resource is a project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests and directly assign to one or more projects.
To create a labor resource:

1. Click Create to open the Create Project Enterprise Resource window.
2. Select Labor in the Type field.
3. Select the Create from HCM Person option and select the person name to create the resource from an employee or contingent worker in Oracle Fusion HCM.

   If you create a project enterprise labor resource from an employee in Oracle Fusion HCM, the employee or contingent worker must have a unique email address in a valid format and an active primary assignment in HCM.

4. Select the Provision Project Roles option to provision the default role assignments for a resource that you create from HCM. If you don’t create the resource from an employee or contingent worker, then enter the resource name and a unique e-mail address. Enable the Request User Account option to request a user account and provision the default role assignments for the user.

   ![Note:](image) If you’re implementing Project Resource Management, you don’t have to create managed project enterprise labor resources from HCM persons. The application maintains resource available capacity for resources that are not HCM employees or contingent workers.

5. Enter the resource’s personal details.
   - The default calendar is from the Define Project Management Implementation Options page.
   - The default primary project role is Team Member.
6. Upload a resume attachment to include text from the resource’s resume in searches for keywords that are entered on project resource requests.
7. To create a managed project enterprise labor resource, select the Manage resource availability and staffing option.

   ![Note:](image) Only managed project enterprise labor resources are eligible to fulfill project resource requests in Project Resource Management.

8. Select a resource pool if you enable this option. The default resource pool is the Resources with No Pool Membership pool.
9. Enter the cost rate and bill rate for the resource.

   The cost rate and bill rate that you enter here are used as the default rates for new resource requests, and for resources that the project manager or project resource manager adds to the Manage Project Plan page and the Manage Project Resources page.
10. Click Save and Close.

Creating an Expense Resource

A project enterprise expense resource is a resource that you can assign to projects or tasks to track expenses in Project Execution Management applications.

To create an expense resource:

1. Click Create to open the Create Project Enterprise Resource window.
2. Select Expense in the Type field.
3. Select the Create from Expenditure Type option and select the expenditure type to create the resource based on an expenditure type that is defined in Oracle Fusion Project Foundation.

   If you don’t create the resource from an existing expenditure type, enter the expense resource name and description.
4. Click **Save and Close**.

**Related Topics**
- Project Enterprise Labor Resource Components
- Project Enterprise Expense Resources
- Import Project Enterprise Resources
- How Project Enterprise Labor Resources are Maintained

## Project Management Configuration

### Overview of Project Management Configuration

In the Define Project Management Configuration activity, you configure Oracle Fusion Project Management to manage projects, tasks, requirements, deliverables, and resources, and to track and resolve issues. This activity contains advanced setup tasks that aren’t required for a typical implementation of Project Execution Management applications.

This table lists the setup tasks in the Define Project Management Configuration task list.

<table>
<thead>
<tr>
<th>Task or Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Project Management Implementation Options</td>
<td>Specify default attributes for the project enterprise such as calendars, progress exception thresholds, currency, FTE hours, and the email banner.</td>
</tr>
<tr>
<td>Manage Enterprise Project Codes</td>
<td>Create and update enterprise project codes to capture additional details on a project using a predefined value set, free text, or numeric data type.</td>
</tr>
<tr>
<td>Manage Enterprise Task Codes</td>
<td>Create and update enterprise task codes to capture additional details on a project task using a predefined value set, free text, or numeric data type.</td>
</tr>
<tr>
<td>Manage Issue Types</td>
<td>Create and update issue types such as the General issue type.</td>
</tr>
<tr>
<td>Manage Deliverable Types</td>
<td>Create and update deliverable types such as the General deliverable type.</td>
</tr>
<tr>
<td>Manage Attributes for Issues and Deliverables</td>
<td>Create and update attributes to capture additional details for issues and deliverables using a predefined value set, free text, or numeric data type.</td>
</tr>
<tr>
<td>Define Project Requirement Configuration</td>
<td>Configure Oracle Fusion Project Management to track requirements, such as features and backlog items, for products and product families.</td>
</tr>
<tr>
<td>Manage Project Management Messages</td>
<td>Review and manage messages for Oracle Fusion Project Management.</td>
</tr>
<tr>
<td>Manage Project Management Attachment Categories</td>
<td>Review and manage attachment categories for Oracle Fusion Project Management.</td>
</tr>
<tr>
<td>Manage Oracle Social Network Objects for Project Execution Management</td>
<td>Enable the display of information in Oracle Social Network about changes to Project Execution Management business objects, and select which attributes to include for each object.</td>
</tr>
</tbody>
</table>
Set Up the Enterprise Project Structure

Use the enterprise project structure (EPS) to allow summarization of project data to a higher level of categorization. Project application administrators can group projects in the enterprise for purposes of reporting to project executives.

To set up the EPS, project application administrators must do the following:

- Create elements and arrange them in a hierarchy.
- Add participants as owners, delegates, and viewers to each element as appropriate. Participants at parent elements receive the same role automatically for child elements.

**Note:** A participant must also be assigned the Project Executive role to access the Project Hierarchy Dashboard.

- Submit the Update EPS Data process.

Creating an Enterprise Project Structure

You can create up to 10 levels in the project structure.

1. Click Navigator > Setup and Maintenance, and search for the Manage Enterprise Project Structure task.
2. Click the Manage Enterprise Project Structure link.
3. In the Enterprise Project Structure section, select a project element.
4. Click the Add Child Element icon.
5. In the Add Child Element window, enter a name and description for the EPS element.
6. Do the following to add participants to an EPS element in the Participants section:
   a. Enter a direct owner in the name column.
   b. Enter a direct delegate in the name column.
   c. Click Add Direct Viewer to add additional viewers for the EPS element.
   d. Click Save and Close.
7. To organize projects into your EPS elements, select the Unassigned Projects element to view all unassigned projects. Newly created projects are automatically assigned to Unassigned Projects element.
8. Perform the following steps to move unassigned projects to the relevant elements:
   a. Select an unassigned project.
   b. Click the Move Project button.
   c. In the Move Projects window select the element to which you want to move the project.
   d. Click Save and Close. Alternatively, you can also drag and drop projects from the Unassigned Project element to move the unassigned projects to relevant element.
9. Click Done.
Updating EPS Data

1. Navigate to the **Scheduled Processes** page.
2. On the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process window, search and select the **Update EPS Data** process.
4. Click **OK**.
5. In the **Process Details** window, click **Submit**.
6. Click **OK** on the confirmation message.
7. Alternatively, a participant can use the **Update EPS Data** action on the Project Hierarchy Dashboard to update EPS data.

**Related Topics**

- Enterprise Project Structures

Manage Oracle Social Network Objects for Project Execution Management

Use Oracle Social Network objects to share and collaborate on key attribute information from the application with stakeholders. This helps in making better business decisions based on the information that you obtain and analyze within your social network.

Managing the Oracle Social Network Objects

Follow these steps to manage Oracle Social Network objects:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Oracle Social Network Objects for Project Execution Management** task.
2. Click the **Manage Oracle Social Network Objects for Project Execution Management** link.
3. In the Business Objects section, expand the **Oracle Social Network Objects**.
4. Expand Project Management and select an object from the list. The attributes for the selected object are displayed in the Attributes section.
5. In the Attributes section, click **Add**. The Select Attributes window opens.
6. Enable or disable an attribute and click **OK**. The changes are reflected in the Attributes section.
7. Select the object and click **Enable Object**. The Enable Object window opens.
8. The following table lists the options that decide how the business object integrates with Oracle Social Network. Select an option.

<table>
<thead>
<tr>
<th>Option</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual</td>
<td>User decides whether to share the object instance in the social network. This is the recommended option.</td>
</tr>
<tr>
<td>Automatic</td>
<td>Shares all instances of the object in the social network.</td>
</tr>
<tr>
<td>No</td>
<td>Doesn’t share any of the object instance in the social network.</td>
</tr>
</tbody>
</table>
9. Click **OK**.
10. Click **Save**.

## Project Resource Management Configuration

### Overview of Define Project Resource Management Configuration

In the Define Project Resource Management Configuration activity, you configure Oracle Fusion Project Resource Management to manage the availability and staffing of resources, fulfill project resource requests, and monitor resource utilization. This activity contains advanced setup tasks that aren’t required for a typical implementation of Project Execution Management applications.

The following table describes the tasks and task lists within the Define Project Resource Management Configuration activity.

<table>
<thead>
<tr>
<th>Task or Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Project Resource Management Implementation Options</td>
<td>Specify options used to control workflow notifications.</td>
</tr>
<tr>
<td>Define Attributes for Employees and Contingent Workers in Human Capital Management</td>
<td>Define the attributes that are required to manage employees and contingent workers in Oracle Fusion Human Capital Management, such as legislative data groups, business units, legal addresses, legal entities, legal entity HCM information, departments, and jobs.</td>
</tr>
<tr>
<td>Define Project Enterprise Labor Resources</td>
<td>Define project enterprise labor resources to use in Oracle Fusion Project Resource Management.</td>
</tr>
<tr>
<td>Manage Target Utilization Percentages</td>
<td>Configure the enterprise target utilization percentage and job-level percentage overrides.</td>
</tr>
<tr>
<td>Manage Standard Lookups</td>
<td>Create and update the project assignment reservation reasons.</td>
</tr>
<tr>
<td><strong>Note</strong>: This task is outside of the Project Resource Management functional area of the Setup and Maintenance work area.</td>
<td></td>
</tr>
<tr>
<td>Manage Project Resource Management Descriptive Flexfields</td>
<td>Define validation and display properties of descriptive flexfields, which are used to add attributes to project resource requests.</td>
</tr>
<tr>
<td>Manage Attributes for Project Resource Requests</td>
<td>Create and update attributes to capture additional details for project resource requests using free text, date, or numeric data type.</td>
</tr>
<tr>
<td>Manage Project Resource Management Attachment Categories</td>
<td>Review and manage attachment categories for Oracle Fusion Project Resource Management.</td>
</tr>
</tbody>
</table>
Manage Resource Staffing Statuses

Create and update staffing statuses for project manager or resource manager to add to a nominated resource for a resource request to communicate the evaluation progress of resource request.

<table>
<thead>
<tr>
<th>Task or Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Resource Staffing Statuses</td>
<td>Create and update staffing statuses for project manager or resource manager to add to a nominated resource for a resource request.</td>
</tr>
</tbody>
</table>

**Related Topics**

- How can I edit the list of valid assignment reservation reasons

### Define Talent Profile Content Items

A profile represents a resource’s knowledge, skill, and level of expertise. Oracle Fusion Project Resource Management uses a resource’s profile to determine if the resource has the qualifications and proficiency requested for a project assignment.

Your implementation team defines talent profile information in Oracle Fusion Human Capital Management. Examples of talent profile information include competencies, licenses and certifications, and languages.

To define a talent profile content item:

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Profile Content Items** task.
2. Click the **Manage Profile Content Items** link.
3. Click **Create** to open the Create Content Item window.
4. Select a content type from the list of values. Oracle Fusion Project Resource Management supports the following content types:
   - Licenses and certifications
   - Competencies
   - Degrees
   - Honors and awards
   - Memberships
   - Languages
5. Enter a content item name.
6. Click **Continue**.
7. Enter the field values on the Create Content Item page.

**Note:** Don't change the settings for the rating model.

8. Click **Save and Close**.

### Manage Employees and Contingent Workers

You can create employees or contingent workers as users, update their talent profiles, then enable them as managed project enterprise labor resources to use in Oracle Fusion Project Resource Management.

**Note:** If you are using a full implementation of Oracle Fusion Human Capital Management, employees and contingent workers are already set up and you can skip these steps.
To create an employee, contingent worker, or both as a user:

1. Click Navigator > Setup and Maintenance, and search for the Manager Users task.
2. Click the Manager Users link.
3. On the Search Person page, click the Create icon.
4. On the Create User page, enter the last name, e-mail, and hire date of the employee or contingent worker.
5. Enter the personal details of the employee or contingent worker.
6. Optionally enter user name.

If you select the option to send the user name and password, the user name and password are sent to the user’s primary e-mail. You can send this information only once.

If you deselect this option, you can send the user name and password to the user later by running the Send User Name and Password E-Mail Notification process. If the user's e-mail account isn't configured, then the user name and password are sent to the user's manager.

7. In the Person Type field, select Employee, Contingent Worker, or Employee and Contingent Worker. Enter the remaining details in the Employment Information section.
8. Select the resource role, reporting manager, and organization.
9. Search for a role, then click Add Role to provision the role manually. Users keep the manually added roles until all their assignments are terminated or you deprovision the role.

If you autoprovion roles, then users inherit roles that match their assignments and the assignments appear in the Role Requests table. Similarly, they are removed from roles that don’t match their assignments.
10. Click Save and Close. The application immediately sends Oracle Identity Management the request to create the user account and provision the roles.

Manage Maintenance Conditions for Project Enterprise Labor Resource

You can create and update project enterprise labor resources from HCM persons by defining a project enterprise labor resource maintenance condition and submitting the Maintain Project Enterprise Labor Resources process. The process creates and updates project enterprise labor resources from the employees and contingent workers who match the maintenance condition. The records are processed in ascending order based on the process order value. If multiple conditions have the same process order value, then records are processed in ascending alphabetic order based on the condition name.

The maintenance condition includes:

- The person type and optionally, specified jobs.
- Attributes that the project enterprise resources are assigned on creation.

To define a project enterprise labor resource maintenance condition:

2. Click the Manage Project Enterprise Labor Resource Maintenance Conditions link.
3. Click the Create icon.
4. On the Create Condition page, enter a name for the condition in the Name field.
5. Enter a value in the Process Order field.
Note: If a project enterprise labor resource doesn’t already exist for that person, then the process creates a resource for the condition with the process order value of one. The process doesn’t create more than one resource for the same person even if subsequent conditions apply to the person.

6. Optionally enter a description.
7. Select a person type from the **Person Type** choice list. The person type can be employee, contingent worker, or both types.
8. Optionally, select a business unit and an organization.
9. To create resources from HCM persons with specific jobs, select a job from the Jobs choice list. Click Add to add another job.
10. Select the **Manage resource availability and staffing** check box to create managed project enterprise resources.
   - Managed project enterprise labor resources are managed in Oracle Fusion Project Resource Management.
   - If you select this option, then by default the resources are added to the **Resources with No Pool Membership** resource pool. You can change this selection to move the resources to another resource pool.
11. Select the resource calendar from the **Calendar** choice list. A resource calendar defines the work schedule for project enterprise labor resources, and includes working days and hours, exceptions, and holidays. This calendar will be assigned to all resources that match the project enterprise labor resource maintenance condition.
12. Select the primary project role to assign resources from **Primary Project Role**. For example, by selecting Oracle Database Administrator, you can create project enterprise labor resources who are Oracle Database Administrators.
13. Select the currency and enter the cost rate in the **Cost Rate** fields.
14. Select the currency and enter the bill rate in the **Bill Rate** fields.
15. Click **Save and Close** on the Create Condition page.
16. On the Manage Project Enterprise Labor Resource Maintenance Conditions page, click **Maintain Project Enterprise Labor Resources** to submit the process of the same name. Run the process to:
   - Create resources.
   - Update resources with HCM changes.
   - Remove resource availability for staffing.
   - Maintain the resource search index.

The following table describes the process options that you can select.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create resources</td>
<td>Create project enterprise labor resources from employees or contingent workers based on selection criteria and attributes defined in maintenance conditions.</td>
</tr>
<tr>
<td>Update resources</td>
<td>Apply any of the following changes that were made to HCM resources to existing project enterprise labor resources:</td>
</tr>
<tr>
<td></td>
<td>o Name</td>
</tr>
<tr>
<td></td>
<td>o Image</td>
</tr>
<tr>
<td></td>
<td>o Email address</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Remove resource availability</strong></td>
<td>Disable the manage resource availability and staffing option for resources who are employees or contingent workers with no active HCM primary assignment.</td>
</tr>
<tr>
<td></td>
<td>◦ Resources who aren’t employees or contingent workers are ignored when determining if a resource has an active primary assignment in Oracle Fusion HCM.</td>
</tr>
<tr>
<td></td>
<td>◦ Resource pool owners receive a notification when resources in their pools are no longer eligible to fulfill project resource requests.</td>
</tr>
</tbody>
</table>

**Note:** If you select **Remove Resource Availability**, then the resources won’t be able to fulfill project resource requests.

17. Click **Submit**. You can run the Maintain Project Enterprise Labor Resources process from either the Manage Project Enterprise Labor Resource Maintenance Conditions page or Scheduled Processes page.

**Related Topics**

- How Project Enterprise Labor Resources are Maintained
- Maintain Project Enterprise Labor Resources Report

**Manage Resource Pools**

Build resource pools to organize managed project enterprise labor resources in hierarchical relationships. You group resources logically for the purposes of staffing and managing resources, and reporting on utilization.

You can review the resource pool details, change the resource pool hierarchy, and move resources from one resource pool to another.

1. Click **Navigator > Setup and Maintenance**, and search for the **Manage Resource Pools** task.
2. Click the **Manage Resource Pools** link.
3. On the Manage Resource Pools page, click **Expand** next to the **All Resources** folder.
   - The pools named **All Resources** and **Resources with No Pool Memberships** are predefined. The **All Resources** pool is always at the top of the resource pool hierarchy.
   - The **Resources with No Pool Memberships** pool is the default pool for new resources.
4. To view the details of a resource pool:
   - a. Place your cursor over a resource pool to view the name of the pool owner.
   - b. Select the resource pool to view the members of the resource pool in the Resource Pool Members section.
5. Resource pool hierarchies represent how the organization manages and reports on resources. For example, resource pools can group resources in a hierarchy by geographic locations, cost centers, skill sets, or primary project roles. To change the resource pool hierarchy by moving a pool to another hierarchy:
   - a. Select the resource pool.
   - b. Click **Move Resource Pool**. You can also drag and drop a pool from one hierarchy to another.
   - d. Click **Save and Close**.
6. To move a resource to another resource pool:
   - a. Select the resource pool in the Resource Pool section.
In the Resource Pool Members section, select the member.

- Click **Move Resources**. You can also drag and drop a member from one pool to another.
- In the Move Resources secondary window, select the target pool from the **Target Resource Pool** choice list.
- Click **Save and Close**.

**Related Topics**
- Resource Pools
- Who can be a member of a resource pool
- Can I delete a resource from a resource pool

### Update Skills and Qualifications for Project Enterprise Labor Resources

Resource managers consider resources’ skills and qualifications when searching for resources to fulfill open project resource requests.

Content types are the skills, qualities, and qualifications that you track in talent profiles. Oracle Fusion Project Resource Management supports the following predefined HCM content types:

- Licenses and Certifications
- Competencies
- Degrees
- Honors and Awards
- Memberships
- Languages

Project enterprise labor resources can update their own skills and qualifications from the My Portrait page. After completing work on a project or after completing training or receiving certifications, resources may want to update their competencies and other qualifications to reflect their updated skills.

**To update your skills and qualifications:**

1. Navigate to My Portrait.
2. Click the **Next** icon until **Experience and Qualifications** appears.
3. Click the **Experience and Qualifications** icon.
4. Click **Edit Skills and Qualifications** in the Skills and Qualifications section.
5. Select a content type that is supported by Oracle Fusion Project Resource Management from the **Content Type** choice list. For example, select **Competencies**.
6. Click **Add**.
7. On the Select and Add secondary window, search for and select a competency.
8. Click **OK**.
9. In the Competencies section, select a proficiency.
10. Click **Expand** to enter the details.

**Note:** The attributes for each content type vary. Enter the values required for the content type that you selected.

11. Click **Submit**.
12. Click **Yes** in the warning message window.
13. Click **OK** in the confirmation message window.

## Submit the Maintain Project Resource Search Index Job Set

Submit the Maintain Project Resource Search Index job set to update the resources that appear on the Search and Evaluate Resources page when a resource manager searches for resources to fulfill project resource requests. The job set consists of a set of processes that facilitate efficient and rapid searches for qualified resources.

Resource managers can’t search for resources or view resource details if the search index isn’t available for a project resource request with qualifications or keywords. For project resource requests without qualifications and keywords, resource managers can search for and evaluate resources based on resource availability even if the search index isn’t current or available.

⚠️ **Caution:** The search index isn’t available if the Maintain Project Resource Search Index job set process fails, or while the process is running.

To submit the job set:

1. Click **Navigator > Setup and Maintenance**, and search for the **Submit Process to Maintain Project Resource Search Index** task.
2. Click the **Submit Process to Maintain Project Resource Search Index** link.
3. Optionally schedule the job set to run at specific times. Setting up a schedule ensures that the index is updated on a regular basis, and has the current qualifications and proficiency information for your resources. To define a schedule:
   a. Click the Schedule tab.
   b. Select the **Using a Schedule** option.
   c. Select the date and time.
4. Optionally define a notification.
   a. Click the Notification tab.
   b. Click the **Create** icon.
   c. In the Create Notification secondary window, enter the e-mail address of the recipient.
   d. Select a condition from the list. The recipient receives a notification when the condition is true. For example, you can choose to send an e-mail to the recipient when the job set is executed successfully.
5. Optionally enter submission notes in the **Submission Notes** field.
6. Click **Submit**.
7. Click **OK** in the confirmation message window. The job set runs immediately unless you specified a schedule.
8. Navigate to the Scheduled Processes work area.
9. Review the status of each process in the job set on the Scheduled Processes page.
10. Verify that the status of the following processes is **Succeeded** on the Scheduled Processes page.
    - Maintain Project Resource Single Attribute Filters
    - Maintain Project Resource Qualification Index
    - Maintain Project Resource Qualification Filters
    - Maintain Project Resource Search Index Job Set

📝 **Note:** When you submit the Maintain Project Enterprise Labor Resources process, you also automatically submit the Maintain Project Resource Search Index job set.
Manage Target Utilization Percentages

Target utilization is the percentage of hours that project enterprise labor resources are expected to work on project assignments compared to their available hours. Oracle Fusion Project Resource Management compares the target utilization percentages with projected and actual utilization for project resources in the Resource Manager Dashboard.

You can define a target utilization percentage for your enterprise and define target utilization percentage overrides for specific jobs. The override percentage applies to resources with a job title in Oracle Fusion HCM, namely resources who are employees or contingent workers.

To define target utilization percentage and job specific overrides:

1. Click Navigator > Setup and Maintenance, and search for the Manage Target Utilization Percentages task.
2. Click the Manage Target Utilization Percentages link.
3. Enter the enterprise target utilization percentage in the range of 0 through 100. The default enterprise target utilization percentage is 100.
4. Click the Add row icon on the Manage Target Utilization Percentages page.
5. Select a job from the Job choice list.
6. Enter a percentage in the range of 0 through 100 in the Target Utilization field. The default target utilization percentage is 100. If a resource’s job doesn’t have a target utilization percentage, then the application uses the enterprise target utilization percentage for that resource. This percentage:
   - Applies to all project enterprise labor resources with the specified job.
   - Overrides the enterprise target utilization percentage.
7. Click Save and Close.
Glossary

**approved budget**
Financial plan type designated as an approved cost budget, approved revenue budget, or both, whose versions are used for specific purposes (for example, as default budget versions for project performance reporting).

**business unit**
A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

**elapsed schedule**
Elapsed schedules define the number of hours to be worked on a day, but not the precise start and end times. For example, all resources work eight hours on Monday, but some resources may start at 8 AM, while others start at 1 PM.

**EPS**
Abbreviation for enterprise project structure. A hierarchical representation of projects based on a user-defined classification for accumulation and roll up of project data for reporting purposes. For example, project executives want to see the demand for resources in all construction projects in an organization.

**expenditure type**
Classification of cost that you assign to each expenditure item in Project Financial Management applications.

**financial plan type**
Category or collection of either project budgets or project forecasts.

**managed project enterprise labor resource**
A project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests and directly assign to one or more projects.

**organization**
A unit of an enterprise that provides a framework for performing legal, managerial, and financial control and reporting. Organizations can be classified to define their purpose, for example, as departments, divisions, legal entities, and can own projects and tasks, or incur project expenses.

**organization classification**
Controls the information that you can set up at the organization level. You can assign multiple classifications to one organization, or define separate organizations to represent different types of entities. For example, you can classify an organization as both a legal entity and a department.
**organization hierarchy**
A tree structure that determines the relationship between organizations.

**primary forecast**
Financial plan type designated as a primary cost forecast, primary revenue forecast, or both. The versions are used for specific purposes, for example, as default forecast versions for project performance reporting.

**primary project role**
Defines the type of work that a resource typically performs on projects, such as project manager, project accountant, or technical lead.

**project and task owning organization**
An organization that can own projects and tasks for the purpose of reporting, security, and accounting.

**project expenditure organization**
An organization that can incur expenditures and hold financial plans for projects.

**project resource request**
List of criteria used to find a qualified resource to fulfill an open resource demand on a project. Project resource requests include qualifications, keywords, requested date range, and other assignment information, such as project role and work location.

**project unit**
An operational subset of an enterprise, such as a line of business, that conducts business operations using projects, and needs to enforce consistent project planning, management, analysis, and reporting.

**rapid implementation**
Use rapid implementation task lists to streamline your setup configuration by focusing only on the critical setup steps. Use the macro-enabled Microsoft Excel templates to configure your applications. For example, implement the Project Financial Management offering by using a single Microsoft Excel workbook. Also, you can use the Microsoft Excel templates in the Define Financials Configuration for Rapid Implementation task list to implement applications within the Financials offering.

**resource pool**
A logical group of resources organized in a hierarchy for purposes of staffing, management, and reporting on utilization.

**summarization**
The summarization or update project performance data process extracts data related to actual cost, commitment, budget, forecast, revenue, and invoice transactions and prepares the data for reporting purposes.