

# Fusion Project Portfolio Management Training

# Define Common Applications Configuration

## Part - 3

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- Define Common Application Configuration for Project Management
- Define Enterprise Structure and Project Organizations
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# Define Enterprise Structure for Project Management

Oracle Fusion Applications ensure that your enterprise can be modeled to meet legal and management objectives.

The 3 structures- legal, functional & managerial are used to describe any firm's operations & to provide basic reporting in fusion apps using COA & organizations. Even though there are other ways for reporting there is a basic procedure to set up your business into business units, departments & divisions according to your objectives

# Define Business Unit

One or many business functions that can be combined in a management structure and to process transactions on behalf of several legal entities. This is known as business unit

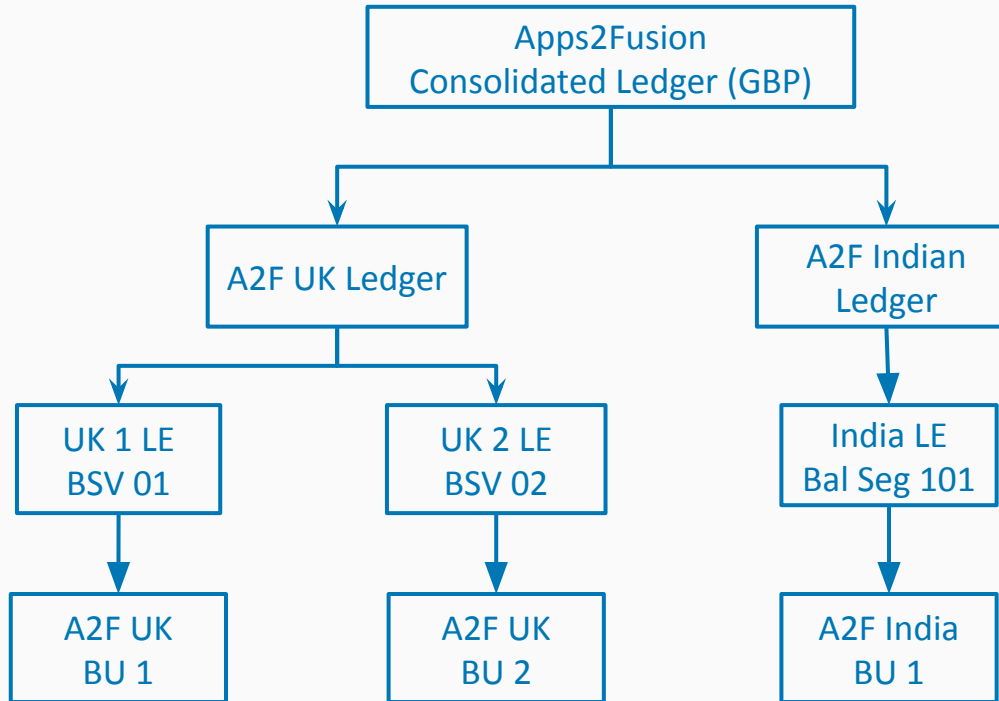
Use business units for:

1. Transaction processing
2. Management reporting
3. Reference data definition and sharing
4. Transactional data security

Oracle Fusion Applications business unit model:

1. Allows for flexible implementation
2. Provides a consistent entity for controlling and reporting on transactions
3. Anchors the sharing of reference data across applications

# Business Units



# Business Unit Security

- Business units are used by a number of Oracle Fusion Applications to implement data security.
- Users are assigned data roles & provided access to data in business units to perform particular functions on it.
- Data roles are automatically generated when the business unit is created whereas Business function specific data roles will be generated when business functions are assigned.
- These data roles must be granted through OIM

# Business Functions Overview

Oracle Fusion Applications has been formed by bringing EBS and PeopleSoft functions together

A business unit in:

Oracle EBS- operating units were assumed to perform all business functions & Oracle PeopleSoft- each business unit had one specific business function. Hence Oracle Fusion Applications allows to define business units with one or many business functions

- A business function signifies activities or business processes that are performed by those who work in a business unit. It also explains how a business unit is used.
- It signifies the people's tasks related to business function in the business unit department
- There can be various business functions that are performed by several departments.
- You can also define levels of divisions, business units, and departments to showcase your organization structure



# Define Project Organization

Manage the organization's projects including the project units, project expenditure organizations (incur expenditures and hold financial plans) and project and task (reporting, security, and accounting) owning organizations.

Types of projects:

- Indirect projects
- Capital projects
- Billable projects
- Capital contract projects

# Define Project Unit

1. Project units are operational division of an endeavour that carry out business operations with projects and need to implement constant project planning, management, analysis, and reporting.
2. Project units regularly signify lines of business, for example Consulting Services, Sales, and Research and Development.
3. Need to set up at least one project unit to use in Oracle Fusion Projects.

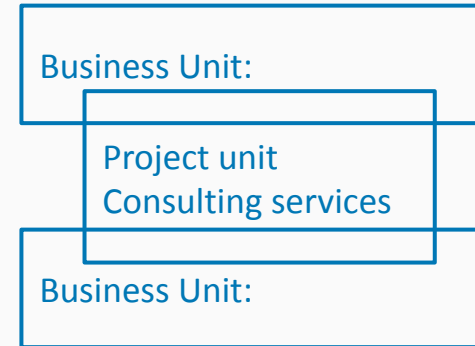
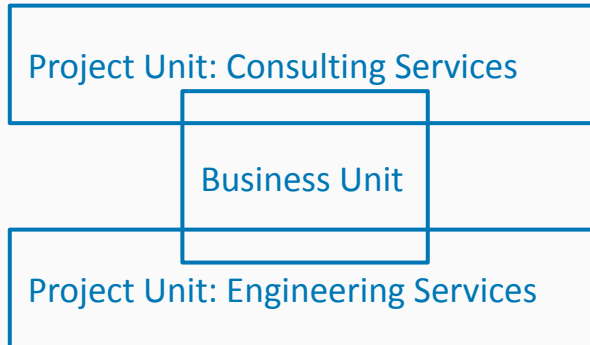
## Project Unit Properties

1. After creating a project unit organization, you should define the following properties.
  - a. Related business units: Connect business units with a project unit to distinguish the business units that are responsible for financial transactions in each project unit.
  - b. General properties: Select the default reference data set to be utilized for the reference data objects with the project unit. Also, give the project number creation process, either manual or automatic, and on a daily basis or periodical full time consequent hours for reporting purposes
  - c. Set assignments: Verify how reference data is shared or divided across the different lines of business in your firm.
  - d. Reporting options: Configure project performance reporting options.

# Project Unit and Business Unit Associations

You can keep up autonomous setup data for each project unit while sharing a solitary way to deal with financial administration over all project units

You can divide financial related data utilizing business units while sharing a solitary way to deal with project administration over all business units.



# Project Organization Classifications

To own projects and task, or project-related expenditures, an organization must be:

- Indexed as a project and task owning organization or a project expenditure organization.
- Assigned to the hierarchy that you indicate in the project implementation options for the business unit.

Manage Project Organization Classifications ?

Search

Name: Location: Classification: \* Effective Date: 5/4/2012 Status:

Search Results

Actions View Format Remove Freeze Detach Wrap

Name	Classification	Status	Location	From Date	To Date
Applications and Service	Department	Active	Atlanta	1/1/80	12/31/12

Change All Selected

☒ Classify as project and task owning organization

☒ Allow indirect projects

☒ Allow projects enabled for capitalization

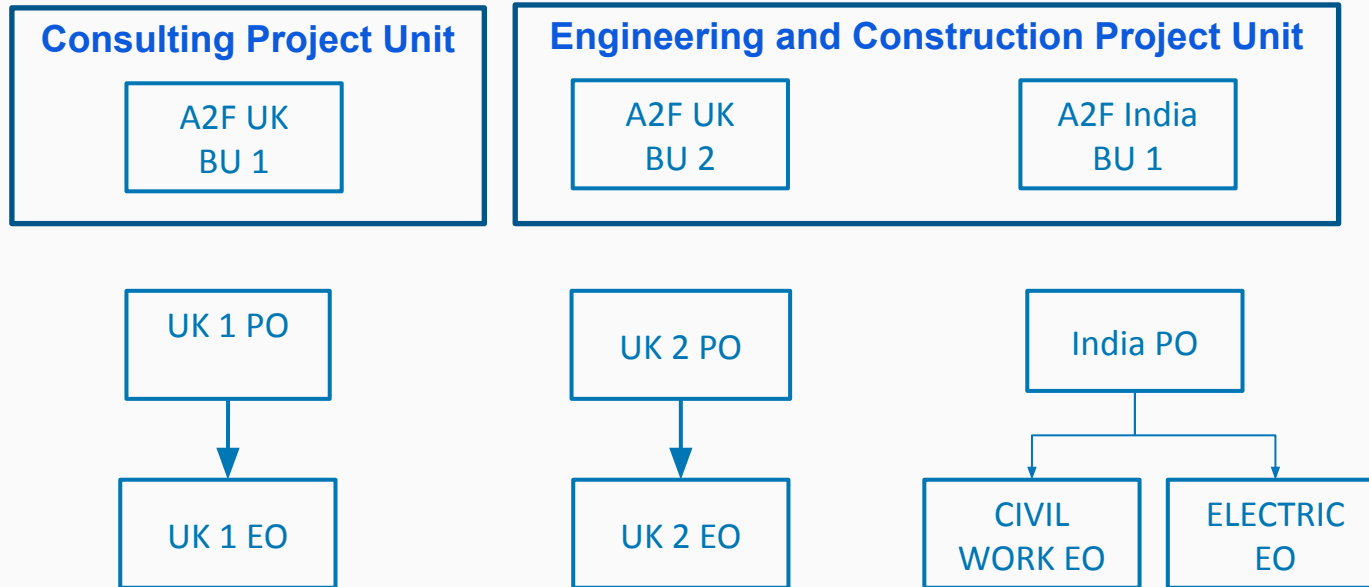
☒ Allow projects enabled for billing

\* Project Unit: Internal Services

☒ Classify as project expenditure organization

Save and Close Cancel

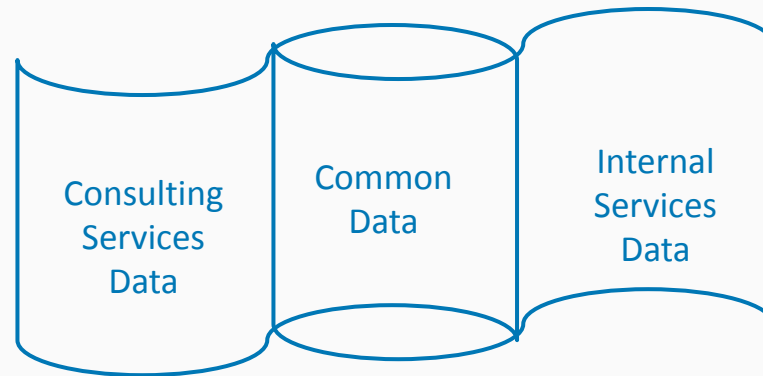
# Project Organization Structure Example



# Define Reference Data Sharing

Reference data sharing helps to share configured data (for example; project types, rates schedules etc) with all the organizational divisions.

According to the requisite (specific or common), each business unit or project unit can retain its data at a central location, using a set of values either particular to it or shared by other business/project units



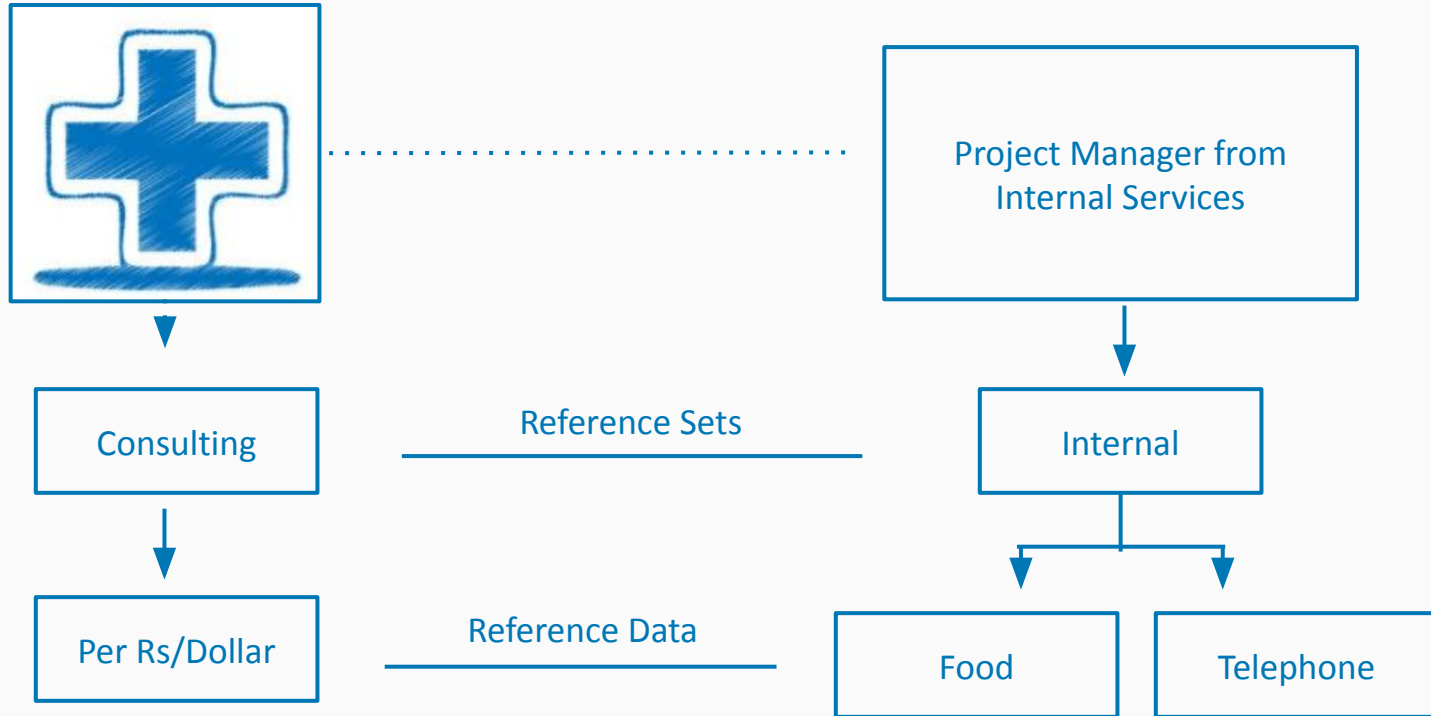
# Reference Data Set Partitions

According to the business context, reference data can be divided into partitions suitable to the organizational entities that will use the data.

Following are the types to define reference data sets for an enterprise:

1. Common: Used globally across the organization as a common set.
2. Shared: Used by a few organizations that work with similar data and therefore share the sets
3. Enterprise specific: Unique to that business unit and not shared by any other business unit within that organization. Add the Enterprise Set to the Receivables Payment Term, Prepayment, defined by line of business and used only by that line of business irrespective of the country or region where it operates.

# Reference Data Partition Example





# Reference Groups

Reference data sets sharing the same business policies and legal rules, are classified into reference groups. Depending on the reference data's functional area and the partitioning requisites, Grouping is done.

<i>Reference Group</i>	<i>Entities</i>
Project Definition	Class codes, Project Roles, Statuses, Project plan types, Financials Plan Types
Project Transaction Types	Expenditure Types, Work Types
Project Accounting Definition	Project Types
Project & Contract Billing	Invoice Formats
Project Rates	Rate Schedules

# Determinant Type

Determinant type is sharing the partitioned reference data depending upon the business context setting. The determinant types available in Project Management are:

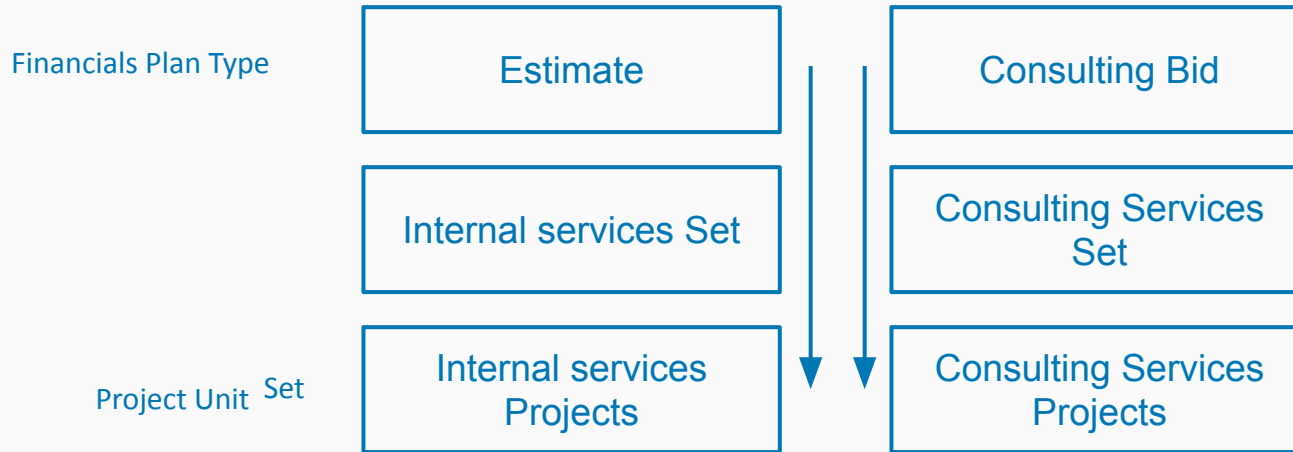
Business Unit: A department or an organization within an enterprise.

Project Unit: A logical organization within an enterprise that is responsible for implementing constant project management practices.

<i>Determinant Type</i>	<i>Reference Group</i>
Business Unit	Project Accounting Definition
Business Unit	Project & Contract Billing
Business Unit	Project Rates
Project Unit	Project definition
Project Unit	Project Transaction Types

# Reference Data Set Assignments

According to the sharing level of data, reference data is assigned to the related reference data sets. If you want to share it across the organization, you can assign it to the predefined Common set and If you want to assign the sets to specific project units you can create specific reference data set.



# Thanks!

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