

Fusion Project Portfolio Management Training

Part 1

Overview

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Definition of Project

A **project** is a temporary endeavor undertaken to create a unique product or service.

Projects are different from other ongoing operations in an organization, because unlike operations, **projects** have a definite beginning and an end - they have a limited duration.

Examples:

- Engineering and Construction - Construction of a House/Apartment/Factory/Warehouse/Bridge/Dam
- Consulting - Oracle Fusion Implementation
- Utilities – Building a Transmission Network

Business Case Study

A2F India is in the business of Engineering and Construction. A2F Owns the Land Bank through Acquisitions in the past. A2F plans for construction of multi floor apartment Building in one of the site and it also plans to sell the apartment units. The start date of the project is 1-Jan-2018 and completion date is 31-Dec-2019.

A2F India names the Project as A2F Multi Floor Building. A2F India takes help from Design Team at A2F UK in BluePrint and the Design of the Building. A2F India assigns a Project Manager and allocates Budget of 100 Million INR.

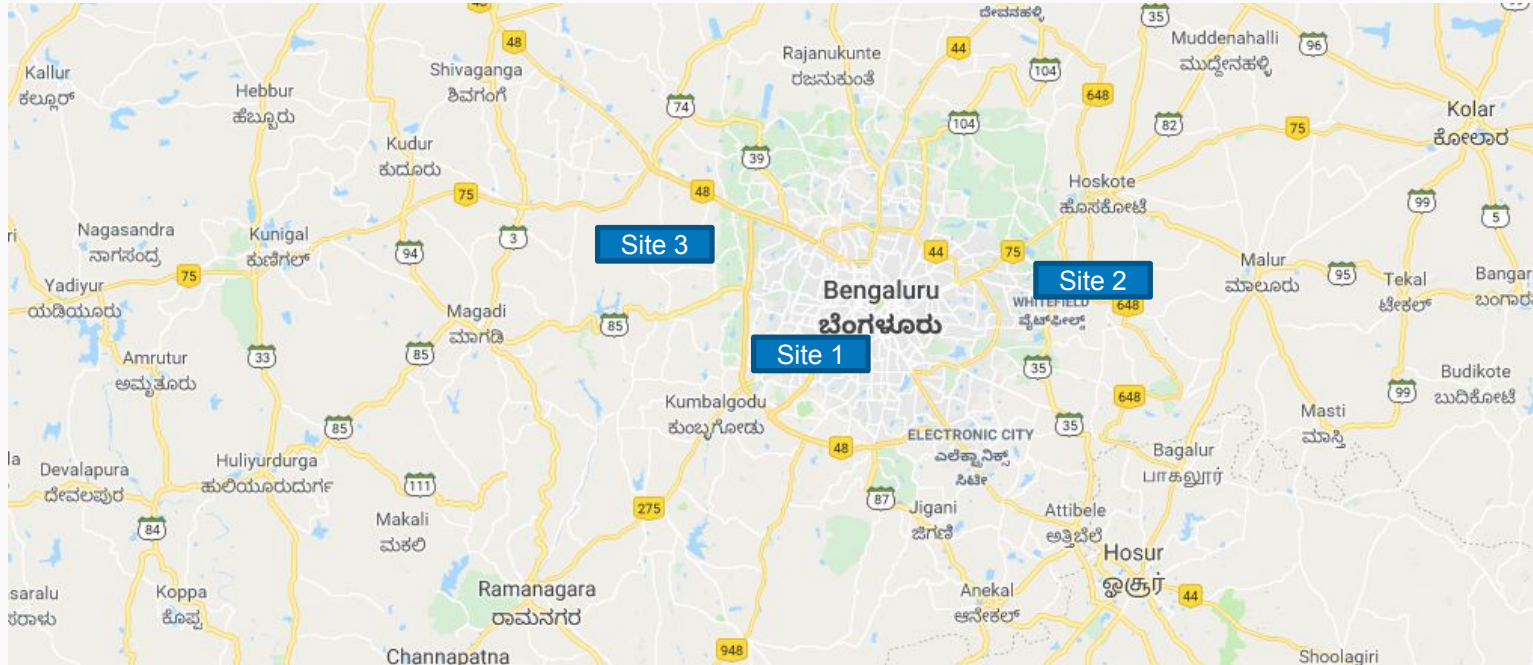
A2F India has skilled labor who are assigned to the Project. It also has a Procurement team which takes care of all Project Procurement Needs. Project Manager Plans different tasks on Project including the Materials, Equipments.

The Purpose of Oracle PPM is to manage this project for visibility of activities, costs, performance of this project by A2F India Management.

We will see how Oracle PPM helps A2F India in Configuration and then Use of system to carry out this Project.

Business Case Study - Phases

Phase 1: Project Selection - Select a Project from available sites (Portfolio of Projects)



Business Case Study - Phases

Phase 2: Initiate a Project



Phase 3: Execute Project / Capture Project Costs

Phase 4: Control Project

Phase 5: Review Project

Phase 6: Close Project



Sell the Apartment

Sign Contract with Customer

Track Milestones

Receive Payments from Customer

Business Requirement

Perform accounting, reporting & legal functions

Perform project planning, analysis & reporting functions

Create projects, incur costs & recognize revenue



Define Legal Entities

Define business Units

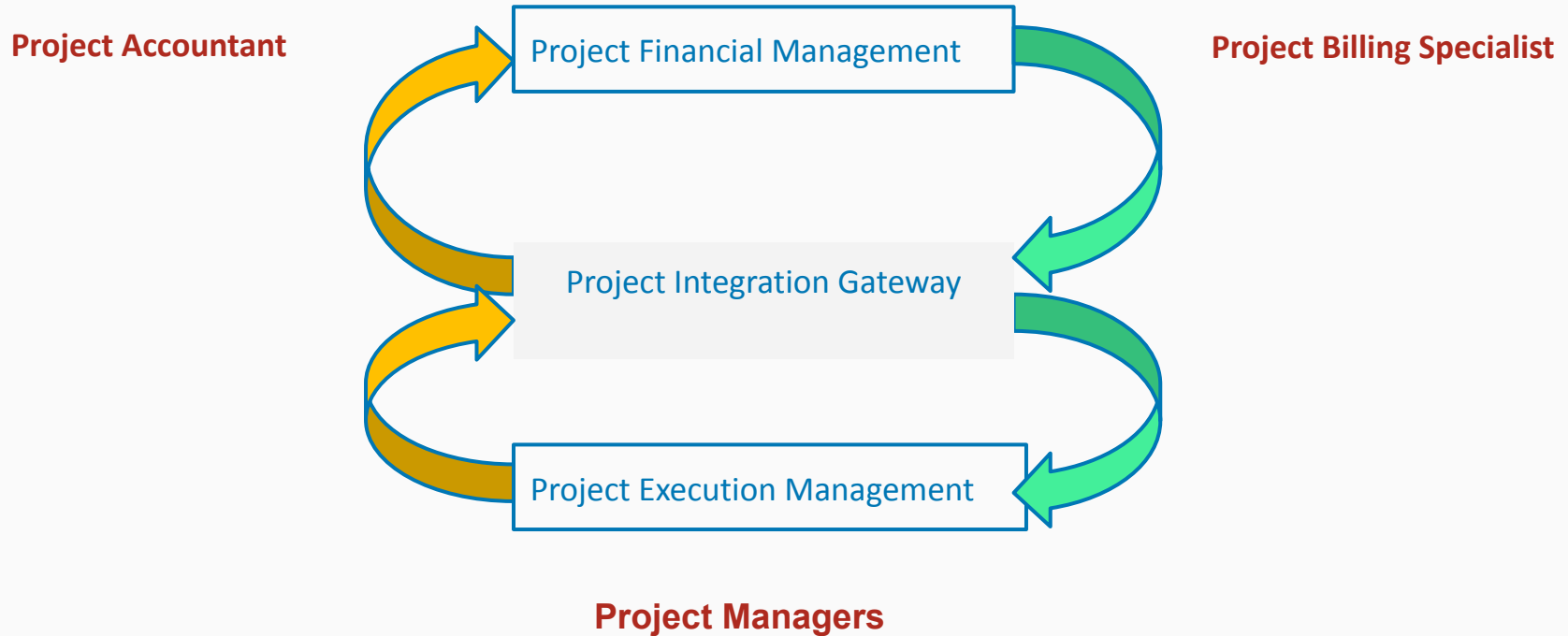
Define Project Units

Define Project-Owning Organizations

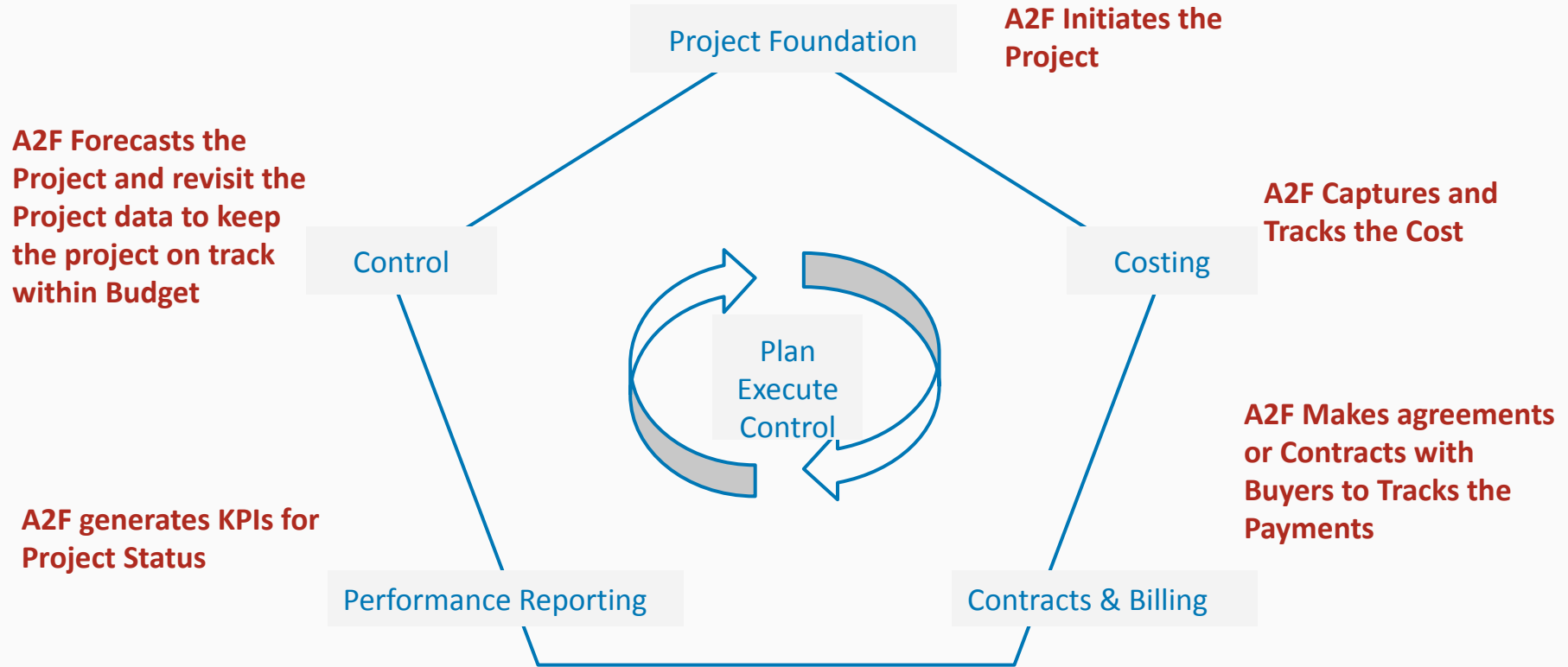
Define Expenditure Organizations

Features Available In Fusion

Overview of Fusion PPM



Project Financial Management



Configure and Use Project Financial Management

	Implementation User Functional Setup	Business User Life Cycle
Initiate Project	Define Project Foundation Configuration	Define Project from Template
Plan and Execute	Define Project Costing Configuration	Manage Financial Project Plan Manage Project Costs Manage Project Assets
Control	Define Project Control Configuration	Manage Project Budget Manage Project Forecast
Analyze	Define Project Performance Reporting Configuration	Review Project Performance

Project Financial Management

Project Work Area

Irrespective of the position, anyone need the right information at right time in the right form

1. Access the project overview & definition directly from the tasks pane
2. Navigate to task easily using the task pane
3. Maintain project settings in the reorganized project definition page

Initiate

- Create Project from Template
- Create Project from Another Project
- Manage Financial Project Settings

Plan and Execute

- Project Overview
- Manage Financial Project Plan

Control

- Manage Project Budget
- Track Financial Project Progress
- Manage Project Forecast

Analyze

- Review Project Performance
- Analyze KPI Categories

Project Costing

The following components are used as a business process within project financial management in a project based firm

Project costing

1. No integration with other business processes within procurement, general ledger, account payables
2. This interface through MS Excel is to import cost transactions from external systems outside the cloud
3. Gives a completely integrated cost management solution for all the projects & activities across

Project Performance Reporting

Revolutionary Project Performance Reporting

1. Enables users to get to the source transaction & take timely action
2. Uses multi-dimensional reporting model to help project stakeholders with answers
3. Trends for project key performance indicators to focus on projects with increasing issues
4. An operational dashboard with insight into the health of a set of projects

Project Control

Unique Financial Control Over Projects
Using Projects Control Cloud



As a part of publishing progress, automatically generates forecasts & earned value metrics. It has control over spending by inspecting the funds at the transaction source. You can Review fund status including the affected project budget.

Make sure that actual & committed project costs budget is under control & also generates comparison for performance evaluation in one step.

Project Billing

Project Billing & Contracts

Project billing can simplify client invoicing, plan the profitability of contract projects & improve cash flow

Project Execution Management

Task Management



Resource Management



Progress Management

- Define Project milestones to view & track the events
- Assign work & integrate additional work identified by team
- Real time self service reporting on project management information

- Project Manager can track & analyze the project team & resource particular events
- Visibility into project labour resource capacity & actual utilization

- Plan & Schedule work in interactive Gantt chart
- Compare actual & target project progress

Task Management

- Manage milestones, deliverables, calendar, profile, project & non-project work in one place.
- Add notes to shared documents
- Add new work & know its status

Resource Management

Managing resource availability is same
for all the resources



Track performance to meet utilization targets with
Actionable dashboards

User friendly options (including keyword search)

Resume based searches

Progress Management

Manage Project Progress



Team Member Dashboard

Enter Progress Page

Propose Task Changes

Thanks!

Contact us:

training@apps2fusion.com

+44 207 101 9262

+ 1 212 404 1735

www.apps2fusion.com

