

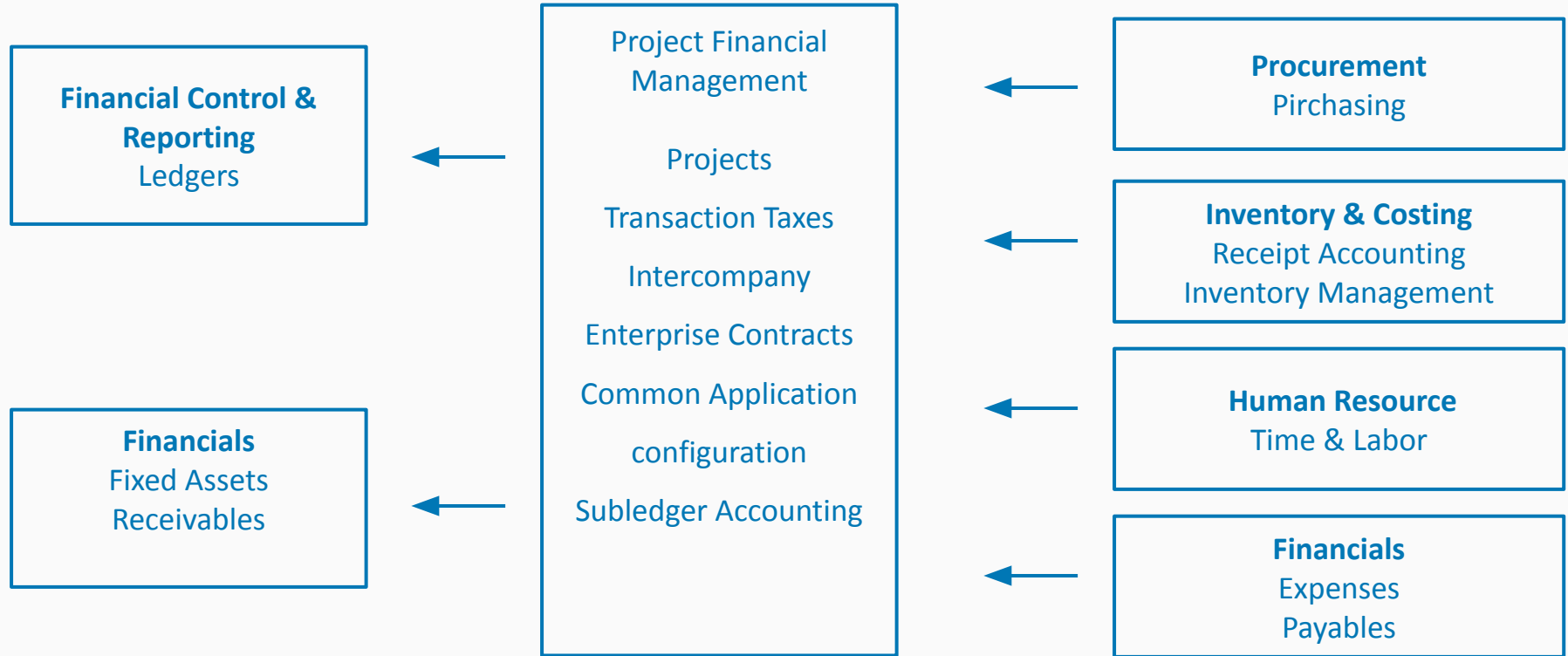
Part 2

Fusion Project Portfolio Management Training

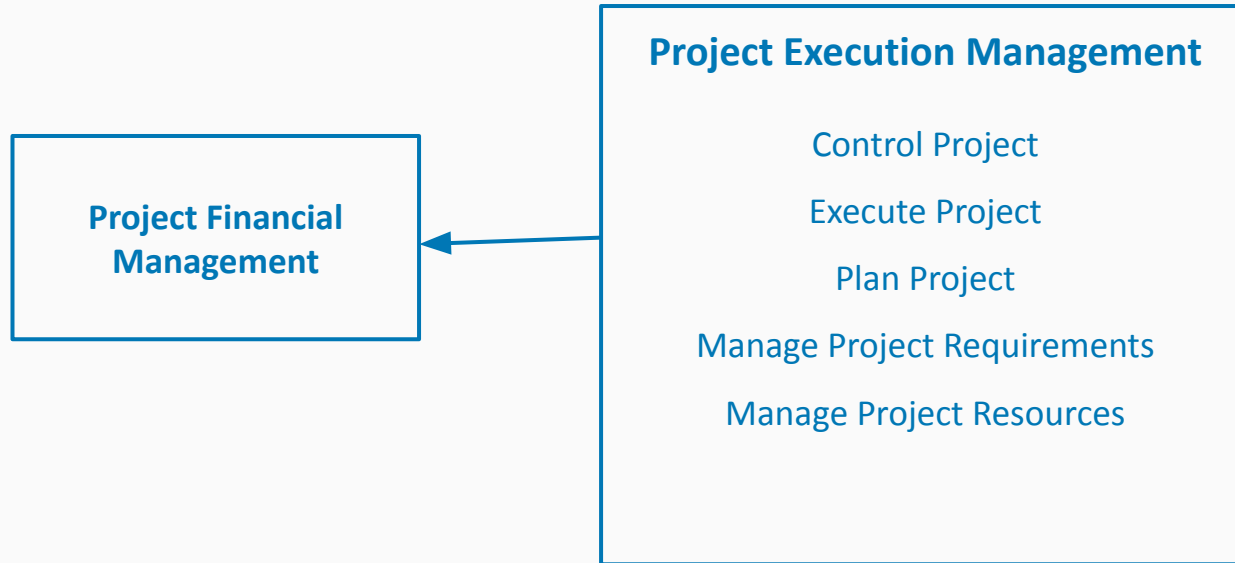
Topics to be covered

- Overview of Fusion PPM
- Overview of Functional Setup Manager for Projects
- Users & Security
- Common Applications Configuration for Projects
- Common Projects Configuration

Project Financial Management Offering



Project Execution Management Offering



Functional Setup Overview

Functional Setup Manager

The Oracle Fusion Functional Setup Manager facilitates initial setup and ongoing maintenance. The Functional Setup Manager guides you through the ongoing steps including:

- Planning: Identify the offerings you want to implement. Evaluate what functional areas and features to opt into and prepare accordingly for their setup requirements.
- Opting In: Select the offerings, functional areas, and features that best fit your business requirements by enabling them.
- Setting up: Use setup tasks to enter setup data necessary for your enabled offerings and functional areas.
- Deploying: Move your verified setup data from the test environment to a production environment and deploy to all users to start transaction processing.
- Maintaining: Update setup data or opt into configuration of the functional areas and features as necessary. Setup Manager.

Functional Setup Overview

Functional Setup Manager

1. Generates customizable list of setup tasks
2. Launches individual setup pages
3. Supports installation
4. Monitors Progress with assignments & task statuses
5. Transfers data between environments
6. Provides single work area for all Oracle fusion Setup
7. Identifies prerequisite, setups required & dependencies

Features

1. Features are enabled across the projects
2. Represents optional or alternative business methods & rules applicable to a functional area or an offering

Offerings

1. Should be self contained & independent from other offerings to provide its functionality
2. Configured by selecting the functional areas & features to be implemented
3. Functional grouping of fusion Apps that is provisioned, administered & implemented as a unit

Functional Area

1. Functional areas may not be relevant to all application implementations
2. Business sub-process that are not managed by same people or at same time
3. Represents a functional module or a sub-grouping of functionality

Key Role

1. FSM Setup- Application Implementation Manager
2. Functional & FSM- Application implementation consultant
3. Functional Setup- Functional User

Scope

1. Different setup data can be entered for different scope values
2. Attribute by which setup data is striped or segmented
3. Must select scope value before navigating to the setup pages
4. E.g; Ledgers, Business Units

Security

Security - Role Based Access Control

- Users can have any number of roles.
- Roles grant access to functions and data.
- Functions and data accessed is determined by the combination of roles

Security - Role Based Access Control

PPM comes with a predefined security reference implementation which consists of:

- predefined security definitions.
 - Job roles that closely match real life jobs.
 - Duty roles.
- A set of security components that are:
 - Delivered with the offering or service.
 - Used to meet the business needs of most enterprises

Security - Role Based Access Control

Job roles represent the job that you hire a worker to perform. Ex. Project Manager

Duty roles represent logical groups of tasks that are performed in a job.

Project Manager has Project Management Duty role.

Project Management Duty role has Manage Project Invoices role.

Security - Role Based Access Control

What is Role Based Access

- Roles define function and data access, and are assigned to users.
 - Access privileges aren't assigned directly to users.
 - Security policies and other features contribute to role definition by abstract, job, and duty roles.
 - These define functional policy which consists of privileges
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- **Project Accountant:** Manages and analyzes the collection, recording, and allocation of project costs and revenue. Ensures accurate project profit and loss calculations. Analyzes budgets and actual costs. Communicates financial performance to program managers and project executives.
 - **Project Administrator:** Assists the project manager with the administrative functions of a project, particularly the functions related to collecting and entering information into the project application.
 - **Project Billing Specialist:** Job role that supports the project billing related requirements in a business.

Configurations

Implementation Projects

1. Create multiple projects to show the scope & timing of an implementation project
2. Generate task lists based on offering configuration
3. Assign tasks to functional users
4. Follow the status
5. Create configuration packages to import & export data

Assigned Implementation Tasks

1. Allows access only to assigned setup tasks
2. It is used only by functional users without direct access to FSM

Application Administration

1. Reflects the sequencing & dependencies of task
2. Cannot assign tasks or track status
3. Enables quick access to tasks by functional area

All Tasks

1. Direct access to a specific task or task list
2. Used for ongoing maintenance

Configuration Pages

1. Create configuration packages for an implementation project
2. Package contains list of setup tasks & business objects to export
3. View and select business objects to be exported
4. Create zip file in the source environment that can be imported to the target environment
5. Start an implementation with a setup configuration template

Name Sales Implementation Project 2013_1

Actions ▾ View ▾ Format ▾ Freeze Wrap »

Import Sequence	Name	Export
10	Application Taxonomy	<input checked="" type="checkbox"/>
20	Application Reference Data Set	<input checked="" type="checkbox"/>
30	Application Reference Data Set Assignment	<input checked="" type="checkbox"/>
40	Application Common Lookup	<input checked="" type="checkbox"/>
50	Application Set-Enabled Lookup	<input checked="" type="checkbox"/>
60	Application Standard Lookup	<input checked="" type="checkbox"/>
70	Application Message	<input checked="" type="checkbox"/>
80	Application Reference Currency	<input checked="" type="checkbox"/>
90	Application Reference ISO Language	<input checked="" type="checkbox"/>
100	Application Reference Territory	<input checked="" type="checkbox"/>

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Import & Export Functionality

1. Services support inserts & updates
2. Except project templates, all other business object setup can be imported and exported
3. Remove repetitive setup data in target environment
4. Import setup data from one environment to another

Setup Data Report

1. Have complete visibility to setup data
2. Review report to verify data
3. View online or download

Object: Sales Status					
LookupValuesVO					
LookupType	LookupCategory	LookupCode	AppliesTo	Enabled	Meaning
OPTY_STATUS	OPEN	POTENTIAL	OPPORTUNITY	Y	Potential
OPTY_STATUS	OPEN	REGISTRATION	OPPORTUNITY	Y	Registration
OPTY_STATUS	OPEN	OPEN	OPPORTUNITY	Y	Open
OPTY_STATUS	WON	WON	OPPORTUNITY	Y	Won
OPTY_STATUS	LOST	LOST	OPPORTUNITY	Y	Lost
OPTY_STATUS	NO_SALE	NO_SALE	OPPORTUNITY	Y	No Sale
REVN_STATUS	OPEN	OPEN_CUST_INTERESTED	REVENUE	Y	Open - Customer Interested
REVN_STATUS	OPEN	OPEN_DISCUSS_WITH_CUST	REVENUE	Y	Open - Discuss with Customer
REVN_STATUS	WON	WON	REVENUE	Y	Closed - Won
REVN_STATUS	LOST	LOST	REVENUE	Y	Closed - Lost
REVN_STATUS	NO_SALE	NO_SALE	REVENUE	Y	Closed - No Sale
OPTY_STATUS	OPEN	NEW	OPPORTUNITY	Y	

Thanks!

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