

Designing Oracle Projects for Both Project Managers & Executive Management

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Objective

- Review Oracle Projects design considerations that help incorporate both project managers' and executive management's requirements into your implementation.

Project Manager Requirements

- Manage project budget
- Manage project timeline
- Manage project resources
- Manage project issues
- Manage project deliverables

Oracle Projects Documentation

http://download-west.oracle.com/docs/cd/B25516_03/current/html/docset.html

- Oracle Projects Implementation Guide
- Oracle Projects Fundamentals User Guide
- Oracle Project Costing User Guide
- Oracle Project Billing User Guide

Executive Management Requirements

- Manage organization's budget
- Manage organization's resources
- Manage organization's growth
- Define organization's direction & focus
- Determine most profitable business lines

Executive Management Analytics

- What types of projects are most profitable?
- What types of projects or services consume most of our resources?
- Which department's projects are consistently within budget?
- Which department's projects are consistently over budget?
- What's the average price of resources or services within a given ERP product?
- How do our resource hours break down between employees and contractors?

Sample Company Profile

National ERP Consulting Services Company

- East, West & Midwest Regions
- Oracle EBS, PeopleSoft & JD Edwards Products
- Implementations, Upgrades & Support
- Use both Employees & Contractors

Oracle Projects Data Elements

- Project Level
 - Project Type
 - Project Class Category
 - Project Organization
- Task Level
 - Service Type
 - Work Type
- Transaction Level
 - Expenditure Category
 - Expenditure Type

Project Level Data Elements

- Project Type
 - A template defined for your implementation. The template consists of project attributes such as the project type class (contract, indirect, or capital), the default revenue distribution rule and bill rate schedules, and whether the project burdens costs.
- Project Class Category
 - An implementation–defined category for classifying projects.
- Project Organizations
 - The Organization that owns the project.

Project Types

- Implementations
- Upgrades
- Support
- Other

Project Class Categories & Codes

- ERP System
 - Oracle EBS
 - PeopleSoft
 - JD Edwards

Project Organizations

- East
- West
- Midwest

Task Level Data Elements

- Service Type
 - An implementation–defined classification of the type of work performed on a task.
- Work Type
 - An implementation–defined classification of work performed.

Service Types

- Custom Development
- Functional ERP Consulting
- Project Management
- Change Management
- Training

Work Types

- Discover
- Design
- Develop
- Deploy

Transaction Level Data Elements

- Expenditure Category
 - An implementation-defined grouping of expenditure types by type of cost.
- Expenditure Type
 - An implementation-defined classification of cost that you assign to each expenditure item.

Expenditure Categories & Types

- Expenditure Category – Labor
 - Expenditure Type – Employees
 - Expenditure Type – Contractors
- Expenditure Category – Expenses
 - Expenditure Type – Airfare
 - Expenditure Type – Lodging
 - Expenditure Type – Ground Transportation
 - Expenditure Type - Meals

Conclusion

- Questions & Answers

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