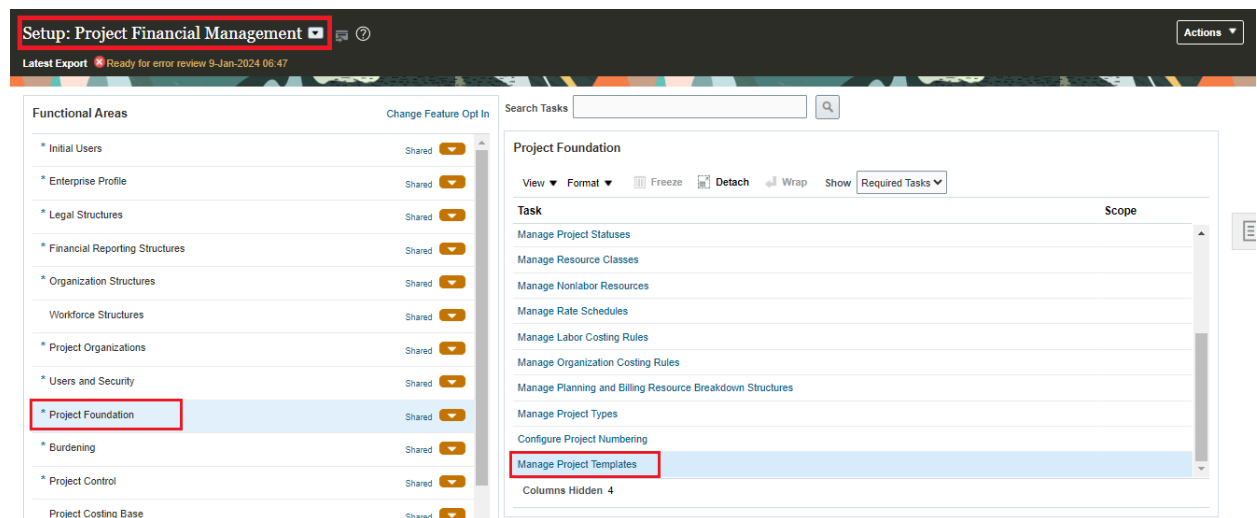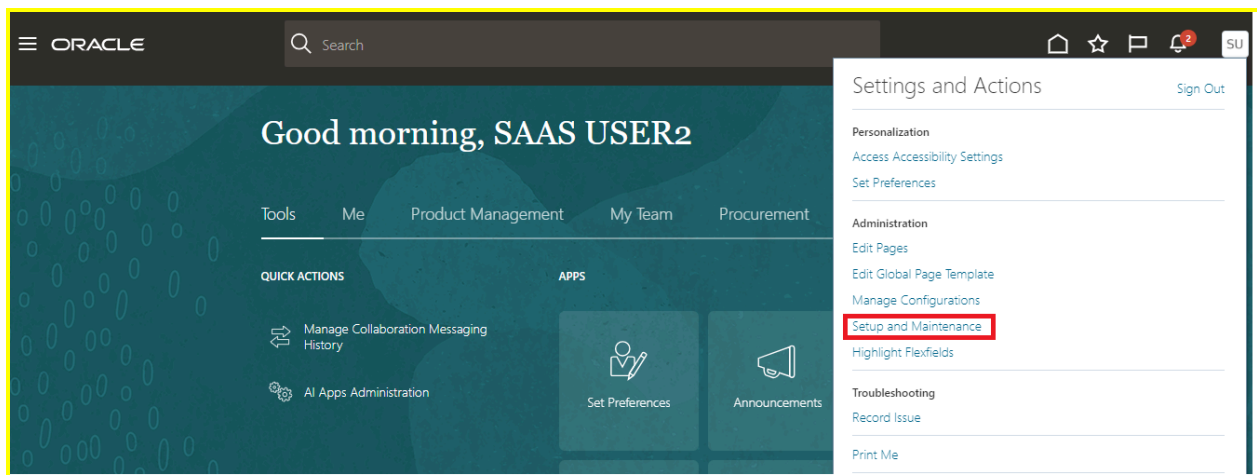# 11.3 - Setup Project Templates in Oracle PPM Cloud

Navigate > Setup and maintenance > Project Financial Management > Project Foundation > Manage Project Templates

Manage Project Templates ⑦ Done

◢ Search   Advanced Saved Search All Templates ▾

                       ** At least one is required

   ** Template Name [   ]   Business Unit [   ]
  ** Template Number [   ]   Project Unit [   ]
   ** Organization [   ]   Project Type [   ]

                      Search Reset Save...

◢ Search Results

View ▾ ☰ ✏ 🗏 Create Template Create Template from Project ▦ Detach

Template Name	Template Number	Business Unit	Project Unit	Organization	Project Type	From Date	To Date
No search conducted.							

Click on Create Template to create

Manage Project Templates ⑦

▸ Search

◢ Search Results

View ▾ ☰ ✏ 🗏 [Create Template] Create Template from Project ▦ Detach

Template Name	Template Number	Business Unit	Project Unit	Organization	Project Type	From Date	To Date
No search conducted.							

Create Project Template

◢ Template Information

    * Name [   ]   Project Type [▾]
   * Number [   ]   * Initial Project Status [▾]
 * Business Unit [▾]   From Date [19-Oct-2024 📅]
  Project Unit [▾]   To Date [dd-mmm-yyyy 📅]
  Organization [▾]
  Legal Entity [▾]
  Description [   ]

Enter the details

- Name – GCS Billable Template
- Number – GCS_Billable_Template
- Business Unit – US1 Business Unit
- Project Unit – GCS project unit
- Organization – Ganga Department
- Legal Entity – US1 Legal Entity

- Description – GCS Billable Template
- Project Type – GCS Direct Project Type
- Initial Project Status – Draft
- From Date – 1-Jan-2001
- To Date – Null

Click on Save and Continue

Enable the Setup options according to the project setup

Quick Entries

Field Name	Specification	Prompt	Required
Organization	-	Organization	Yes
Legal Entity	-	Legal Entity	Yes
Team Member	Project Accountant	Project Accountant	Yes
Team Member	Project Manager	Project Manager	Yes

Click one save and continue

Edit Basic Information details

Enter Basic information

- Priority – Null
- Outline Display Level – 1
- Cascade Option – Do not cascade project date changes to tasks
- Start Date – 1-Jan-2001
- Planning project – Enable
- Work Type – Null
- Service Type – Null
- Finish Date – Null
- Enable budgetary control – Disable

Add Project Plan Type

Click Edit to Add Project Plan

Click on + symbol to add task

Select subtask for first task and select peer task for later tasks

Click on Financial to edit finance details

Click on edit in Currency conversion

- Project currency - USD
- Rate Type – Corporate
- Date Type – Transaction Date

Click on Save and close

Burden Schedule Assignment

- Burden Schedule – GCS Burden Schedules

Click on Done

Click on Save and Close