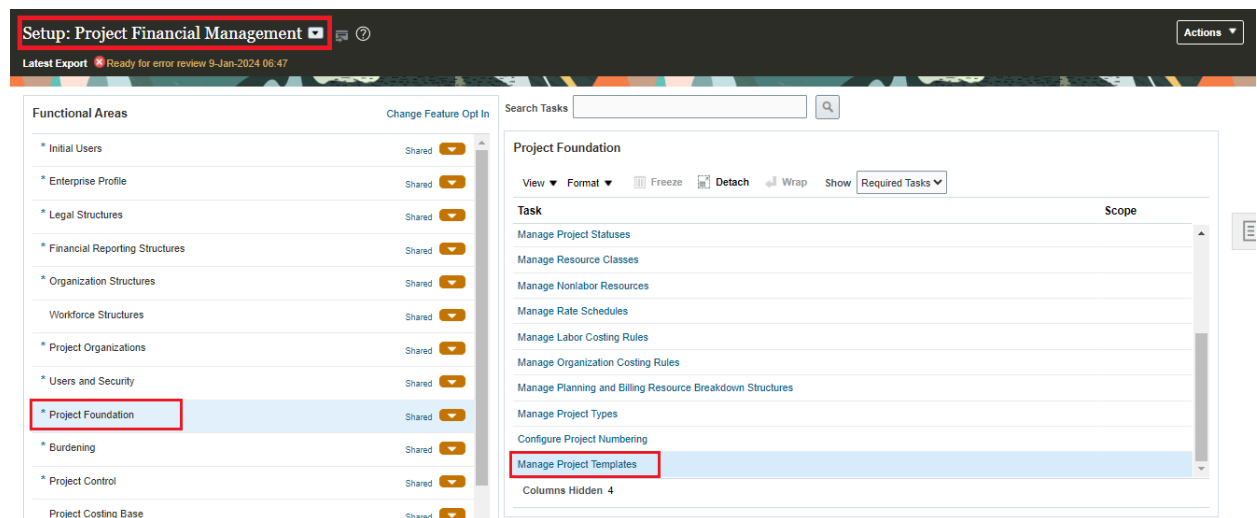
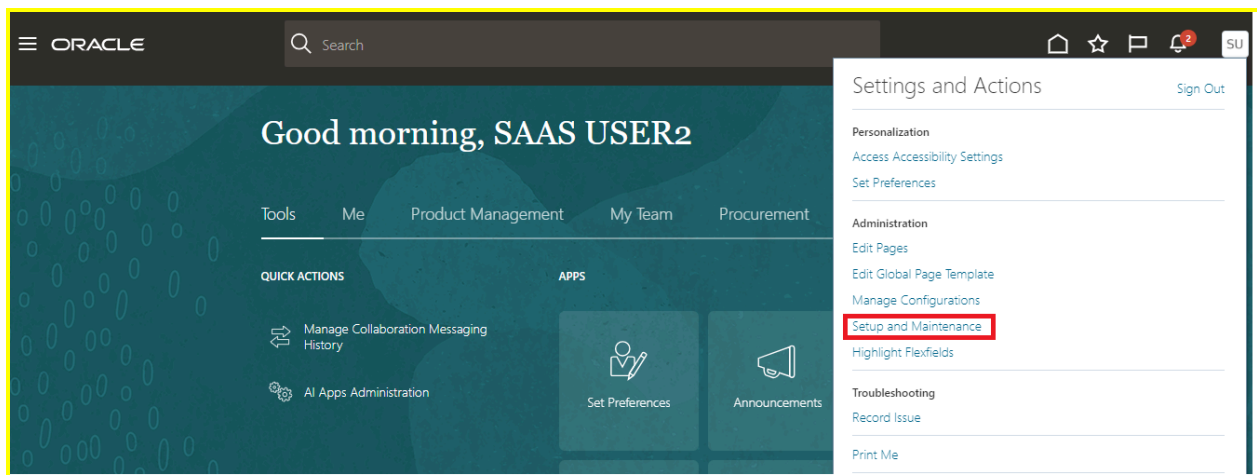


11.3 - Setup Project Templates in Oracle PPM Cloud

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



ORACLE

Manage Project Templates ?

Search

Advanced Saved Search All Templates

** 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 ?

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

* Number

* Business Unit

Project Unit

Organization

Legal Entity

Description

Project Type

* Initial Project Status

From Date 19-Oct-2024

To Date dd-mmm-yyyy

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

Create Project Template
Save and Continue
Cancel

Template Information

* 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

dd-mmm-yyyy

Enable the Setup options according to the project setup

Setup Options

Check the options to display on projects created from this template. Click an option name to enter details.

Option	Go To	Display
Setup		
Project		
Basic Information		<input checked="" type="checkbox"/>
Project Plan		<input checked="" type="checkbox"/>
Team Members		<input checked="" type="checkbox"/>
Project Customers		<input checked="" type="checkbox"/>
Partner Organizations		<input checked="" type="checkbox"/>
Supplier Organizations		<input checked="" type="checkbox"/>
Project Classifications		<input checked="" type="checkbox"/>
Project Plan Type		<input type="checkbox"/>
Resource Breakdown Structure		<input checked="" type="checkbox"/>
Attachments		<input checked="" type="checkbox"/>
Additional Information		<input checked="" type="checkbox"/>

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

Quick Entries ?

View     Detach

Field Name	Specification	Prompt	Required
Organization		Organization	<input checked="" type="checkbox"/>
Legal Entity		Legal Entity	<input checked="" type="checkbox"/>
Team Member	Project Accountant	Project Accountant	<input checked="" type="checkbox"/>
Team Member	Project Manager	Project Manager	<input checked="" type="checkbox"/>

Click one save and continue

Edit Project Template: GCS Billable Template, GCS_Billable_Template ?

Save
Cancel

Save and Close
Save and Continue

Template Information

* 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
dd-mm-yy

Sponsored Project
No

Setup Options

Check the options to display on projects created from this template. Click an option name to enter details.

Option	Go To	Display
Setup		
Project		
Basic Information		<input checked="" type="checkbox"/>

Edit Project Template: GCS Billable Template
Done

Project Financial Reporting

Expand All Collapse All

Basic Information
Project Plan ?
Team Members
Project Customers ?
Partner Organizations
Supplier Organizations
Project Classifications ?
Project Plan Type ?
Resource Breakdown Structures ?
Attachments
Additional Information

Edit
Edit
Edit
Add Edit
Edit
Edit

Edit Basic Information details

Project Financial Reporting

Expand All Collapse All

Basic Information

Priority
Outline Display Level 1
Start Date 1-Jan-2001
Planned Start Date
☒ Planning project

Work Type Billable
Service Type
Finish Date
Planned Finish Date
☐ Enable budgetary control

Edit

Project Plan ?

Task Number	Task Name	Planned Start Date	Planned Finish Date	Billable	Chargeable	Task Manager
GCS_Billable_Template	GCS Billable Template	1-Jan-2001			Yes	

Team Members

Show ☐ All members
☒ Current members

View

Person	Email	Project Role	Start Date	End Date	Security Assignment Status	Track Time
No data to display.						

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

Expand All Collapse All

Basic Information

Priority

Outline Display Level 1

Start Date 1-Jan-2001

Planned Start Date

✓ Planning project

Work Type

Service Type

Finish Date

Planned Finish Date

Enable budgetary control

Edit

Add Project Plan Type

Project Plan Type ?

Project Plan Type GCS Project Plan Type

Description GCS Project Plan Type

Click Edit to Add Project Plan

Project Plan ?

Edit

Task Number	Task Name	Planned Start Date	Planned Finish Date	Billable	Chargeable	Task Manager
GCS_Billable_Template	GCS Billable Template	1-Jan-2001			Yes	

Manage Financial Project Plan

Display Hierarchy List

Tasks Gantt Chart

Save Save and Close Cancel

Actions View + - Detach Go to Task Number Tasks All tasks

* Task Number	* Task Name	Resources	* Planned Start Date	* Planned Finish Date	Effort	Burdened Cost
					Planned	ITD Actual
						Planned in Project Currency (USD)
						ITD Actual in Project Currency (USD)
GCS_Billable_Ter	GCS Billable Template		1-Jan-2001			

Rows Selected 1 Columns Hidden 35 Columns Frozen 2

Click on + symbol to add task

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

Tasks Gantt Chart

Save Save and Close Cancel

Actions View + - Detach Go to Task Number Tasks All tasks

* Task Number	* Task Name	Resources	* Planned Start Date	* Planned Finish Date	Effort	Burdened Cost
					Planned	ITD Actual
						Planned in Project Currency (USD)
						ITD Actual in Project Currency (USD)
GCS_Billable_Ter	GCS Billable Template		1-Jan-2001			
1	Labor	+	1-Jan-2001	1-Jan-2001		
2	Non Labor	+	1-Jan-2001	1-Jan-2001		
3	Miscellaneous	+	1-Jan-2001	1-Jan-2001		

Rows Selected 1 Columns Hidden 35 Columns Frozen 2

Click on Financial to edit finance details

Project

Financial

Reporting

Expand All

Collapse All

▲

Budgets and Forecasts

Budgets

Forecasts

Manage Project Budgets

Amounts are listed in Project Currency: USD

View

▼

Detach

Name	Number	Status	Exceptions	Financial Plan Type	Planning Amounts	Total Burdened Cost (USD)	Total Revenue (USD)	Margin Percentage	Attachments	Locked By
No data to display.										

▲

Transaction Controls

Last Updated By

Last Updated Date

▲

Currency Conversion

?

Project Currency

USD

▲

Conversion Attributes to Project Currency

Rate Type

Corporate

Date Type

Transaction Date

Date

Click on edit in Currency conversion

▲

Currency Conversion

?

Project Currency

USD

▲

Conversion Attributes to Project Currency

Rate Type

Corporate

Date Type

Transaction Date

Date

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

Click on Save and close

Click on Save and Close

Edit Project Template: GCS Billable Template, GCS_Billable_Template

Save

Cancel

Save and Close

Save and Continue

Template Information

* NameGCS Billable Template

* NumberGCS_Billable_Template

Business UnitUS1 Business Unit

Project UnitGCS project unit

* OrganizationGanga Department

* Legal EntityUS1 Legal Entity

DescriptionGCS Billable Template

Project TypeGCS Direct Project Type

* Initial Project StatusDraft

From Date1-Jan-2001

To Datedd-mm-yy

Sponsored ProjectNo