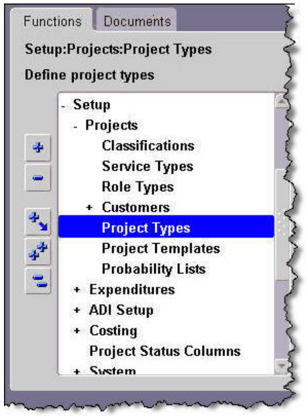
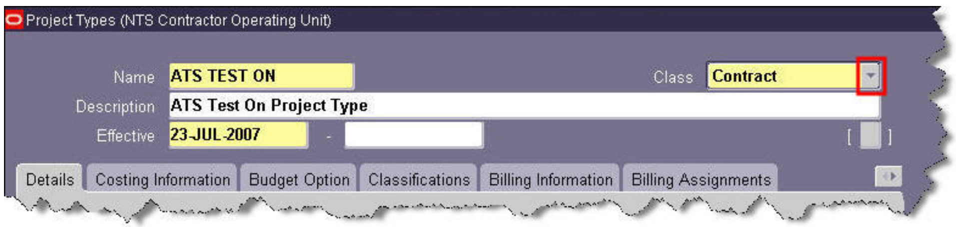
CREATING PROJECT TYPES [FOR PROGRAM FINANCE SUPER USERS]

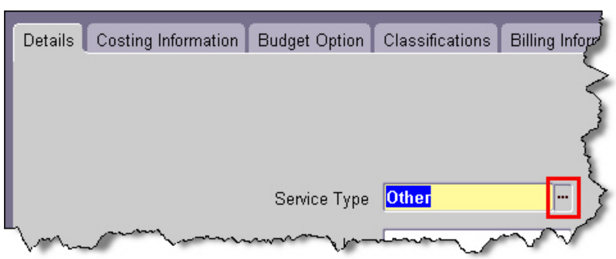


1. From the **Oracle Navigator** select **Setup : Projects : Project Types**

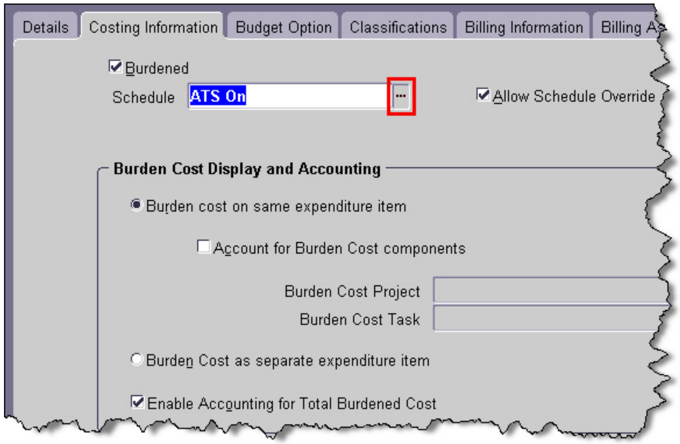
(Note: Fields in yellow are required)



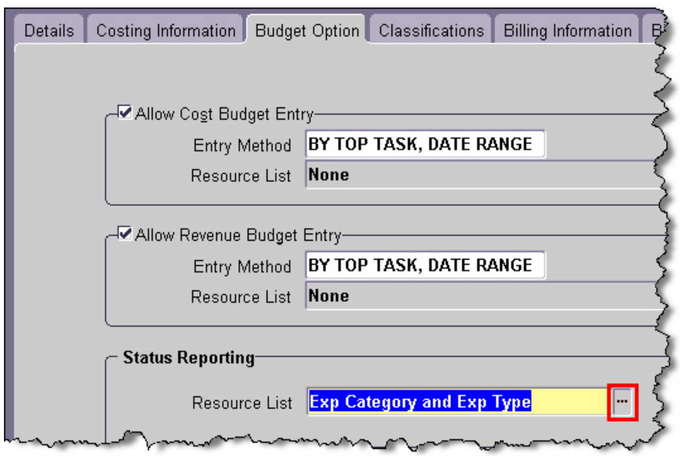
2. In the header area of the **Project Types** window:
   - **a.** Enter a **Name** for the project
   - **b.** Use the **Class** drop-down list to select either ***Indirect*** or ***Contract*** (do not use ***Capital***) – this selection will affect the number of tabs that appear below
   - **c.** Enter a **Description**
   - **d.** Click the **Effective** field to use the lookup list button to select a date (usually the beginning of a fiscal month)



3. On the **Details** tab:
   - **a.** Enter a **Service Type** by using the lookup list button that appears when the field is selected – always choose **OTHER**
   - **b.** Leave the other fields blank

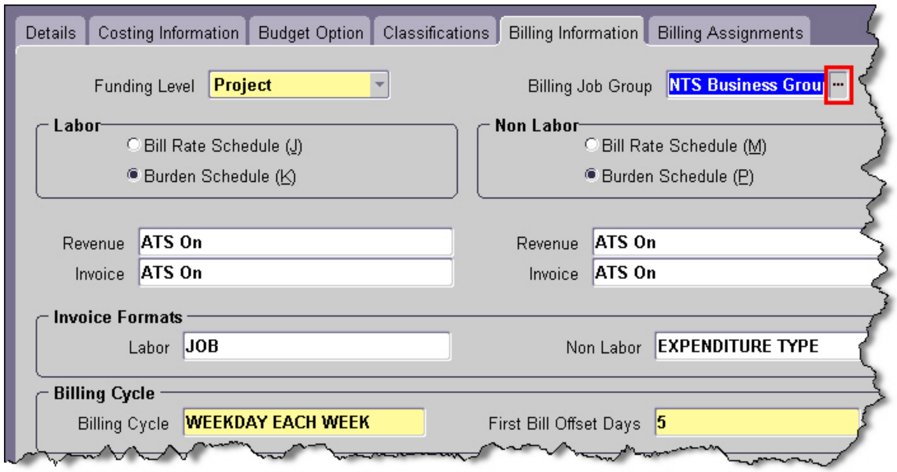


4. On the **Costing Information** tab:
   a. Check the **Burdened** check-box – the **Burden Cost Display and Accounting** section will become available, however, do not make any changes to these fields
   b. Use the lookup list button to select a **Schedule**
   c. Check the **Allow Schedule Override** check-box

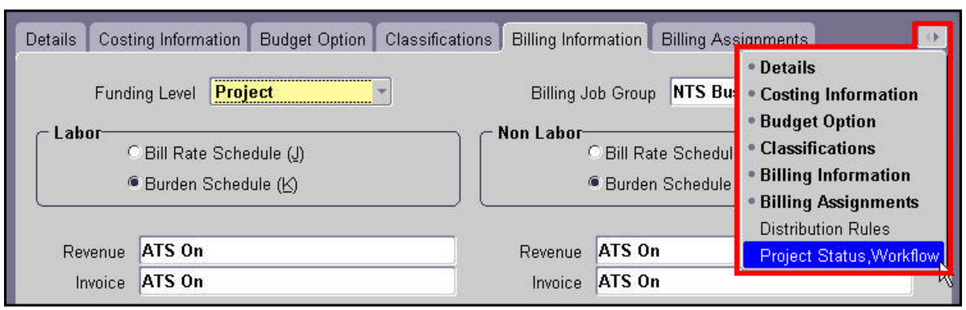


5. On the **Budget Option** tab:
   a. Check the **Allow Cost Budget Entry** check-box
   b. Use the lookup list button for **Entry Method** – always select **BY TOP TASK, DATE RANGE** (**None** will automatically appear in the **Resource List** field)
   c. Check the **Allow Revenue Budget Entry** check-box
   d. Use the lookup list button for **Entry Method** – always select **BY TOP TASK, DATE RANGE** (**None** will automatically appear in the **Resource List** field)
   e. In the **Status Reporting** section use the lookup list button for **Resource List** to always select **Exp Category and Exp Type**

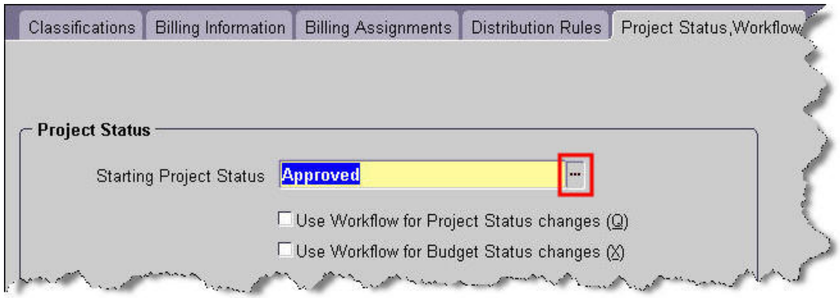
Note: When you enter the value in the **Resource List** ***field of the*** **Status Reporting** ***section, you will immediately be directed to another tab. If <u>Contract</u> was selected in the header area (step 2), you will be directed to the*** **Billing Information** ***tab. If <u>Indirect</u> was selected in the header area, you will be directed to the*** **Project Status, Workflow** ***tab***



6. If you were directed to the **Billing Information** tab:
   - a. The **Funding Level** will already be filled in
   - b. Clicking the lookup list button in **Billing Job Group** will automatically fill in **NTS Business Group**
   - c. Under **Labor**, selecting the radio button for **Burden Schedule(K)** will change the field names below it to **Revenue** and **Invoice**
   - d. Under **Non Labor**, selecting the radio button for **Burden Schedule(P)** will change the field names below it to **Revenue** and **Invoice**
   - e. Under **Labor**, use the lookup list button to select the entry for the **Revenue** field (this should be the same as the **Schedule** selected on the **Costing Information** tab in step 4) – this also fills in the **Revenue** field for **Non-Labor**
   - f. Under **Labor**, use the lookup list button to select the entry for the **Invoice** field (this should be the same as the **Schedule** selected on the **Costing Information** tab in step 4) – this also fills in the **Invoice** field for **Non-Labor**
   - g. In the **Invoice Formats** section, click the lookup list button in the **Labor** field to automatically enter **JOB**
   - h. Click the lookup list button in the **Non Labor** field to automatically enter **EXPENDITURE TYPE**
   - i. Click the lookup list button in the **Billing Cycle** field to enter **WEEKDAY EACH WEEK**
   - j. Type the number **5** in the **First Bill Offset Days** field
   - k. Leave the **Funding** section blank

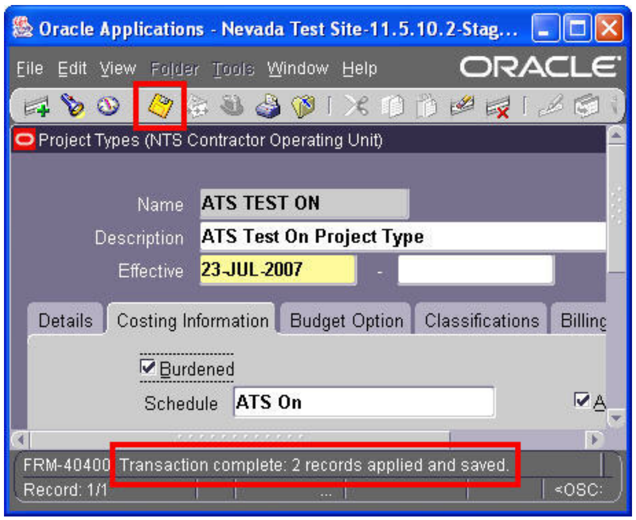


7. If **Indirect** was selected in the header area (step 2) then select the **Project Status, Workflow** tab – If **Contract** was selected in the header area then, at this point, the system will not let you select the next tab so you must use the drop-down tab menu:
   - a. Click the drop-down tab menu tool (tabs that are currently visible are in boldface)
   - b. Select the option for the **Project Status, Workflow** tab



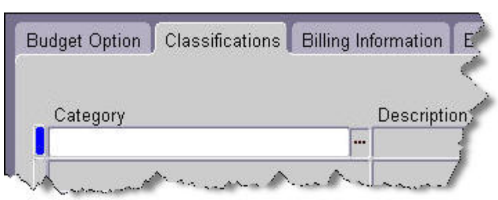
8. On the **Project Status, Workflow** tab:

- **a.** Use the lookup list button in the **Starting Project Status** field to always select ***Approved*** (do not select ***Submitted*** or ***Unapproved***)
- **b.** Leave the check-boxes un-checked



9. The **Project Type** should be saved at this point (if **Contract** was selected in the header then any remaining tabs are unavailable until the project is saved):

- **a.** Click the **Save** tool on the Oracle toolbar
- **b.** A message will appear on the status bar (at the bottom of the window) reporting that **Transaction complete: 2 records applied and saved**
- **c.** Any remaining tabs can now be viewed and edited

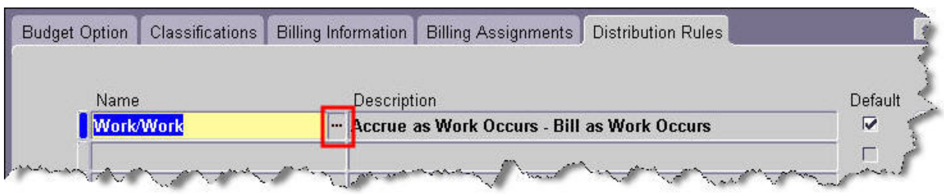


10. If Contract was selected in the header then there will be a **Classifications** tab:

- **a.** Leave the fields blank

11. If Contract was selected in the header then there will be a **Billing Assignments** tab:

a. Leave the fields blank

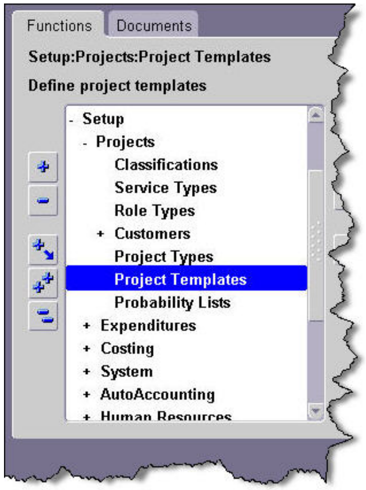


12. If Contract was selected in the header then there will be a **Distribution Rules** tab:

a. Use the lookup list button in the **Name** field to always select ***Work/Work*** (the Description tab will automatically fill in with **Accrue as Work Occurs - Bill as Work Occurs**

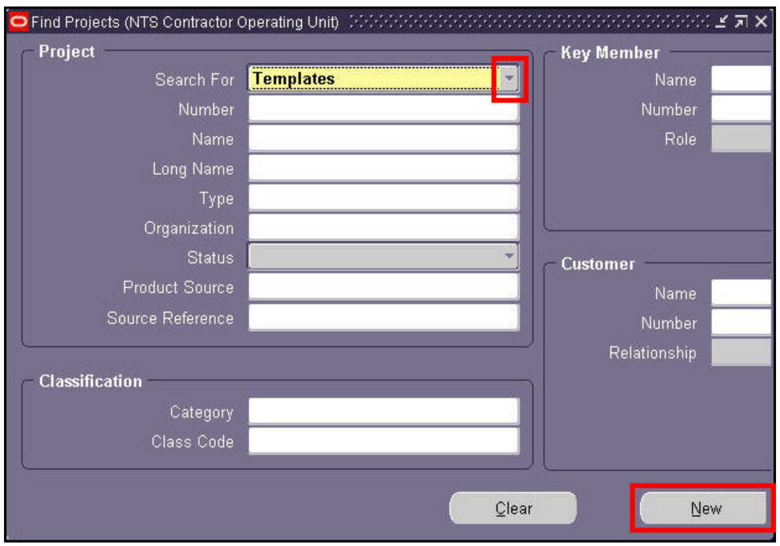
b. If any changes were made, **Save** the **Project Type** again and close the **Project Type** window

CREATING A PROJECT TEMPLATE [FOR PROGRAM FINANCE SUPER USERS]

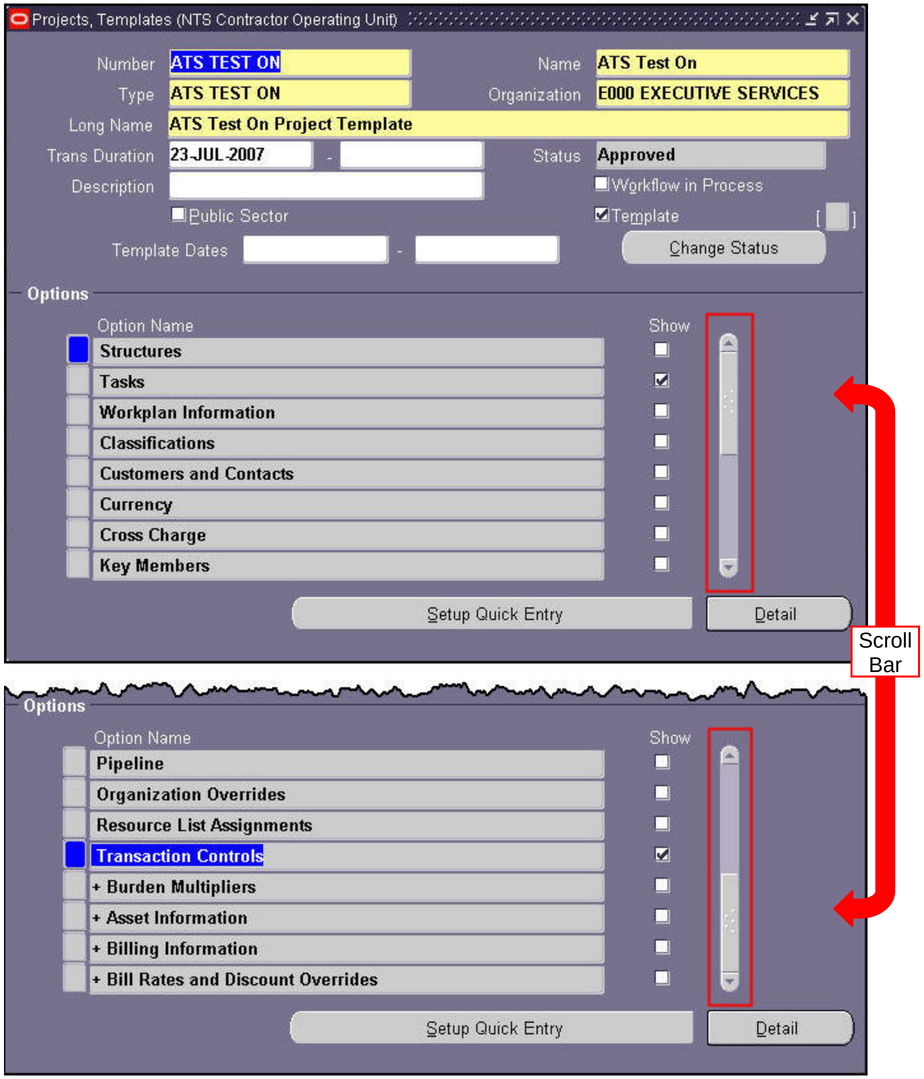


1. From the **Oracle Navigator** select **Setup : Projects : Project Templates**

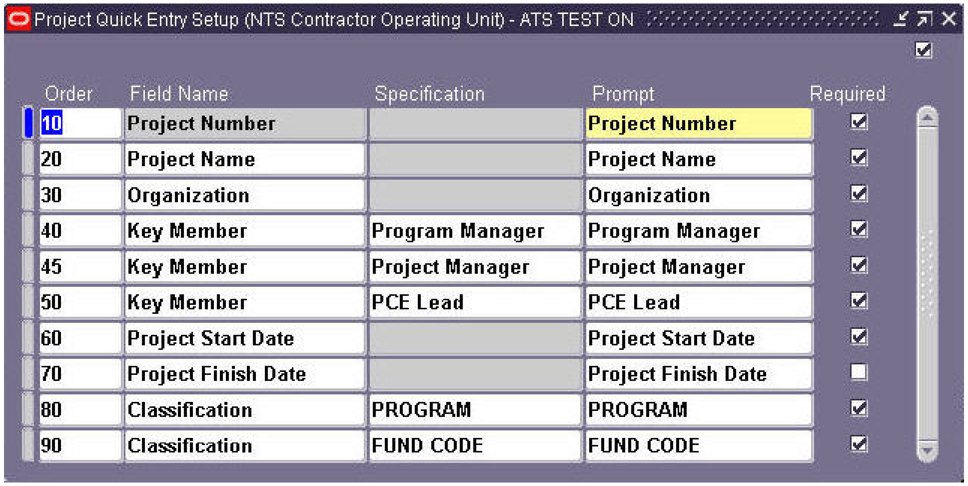
(Note: Fields in yellow are required)



2. In the **Find Projects** window:
   a. Click the **Search For** drop-down button and select **Templates**
   b. Click the **New** button

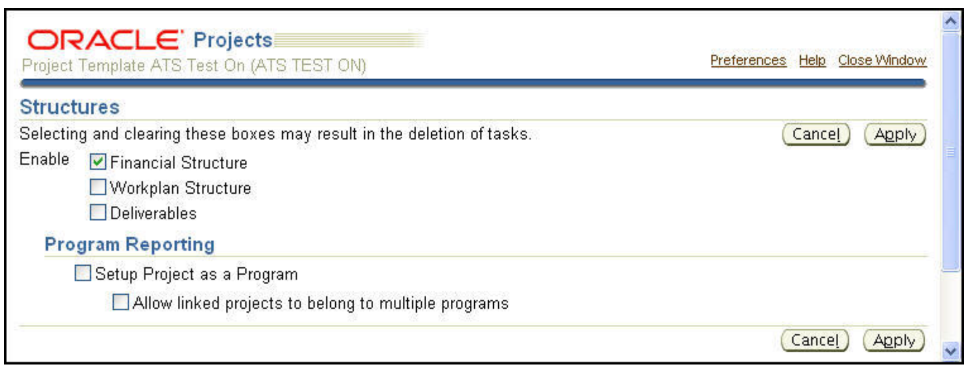


3. In the header area of the **Project, Templates** window:
   a. Enter a **Number** for the project template
   b. Enter a **Name** for the project template
   c. Use the lookup list button ... to select a project **Type**
   d. Use the lookup list button to select an **Organization**
   e. Enter a **Long Name**
   f. Click the **Trans Duration** field to use the lookup list button to select a date (usually the beginning of a fiscal month)
   g. In the **Options** section, uncheck the check-boxes in the **Show** column corresponding to the **Option Name**(s) you wish to hide from the users of the project form – use the scroll bar to view the entire **Option Name** list – only **Tasks** and **Transaction Controls** should remain checked
   h. Click the **Setup Quick Entry** button to open the **Project Quick Entry Setup** window



4. In the **Project Quick Entry Setup** window enter the following **Order** and **Field Name**:

- **a. 10 Project Number**
- **b. 20 Project Name**
- **c. 30 Organization**
- **d. 40 Key Member Program Manager**
- **e. 45 Key Member Project Manager**
- **f. 50 Key Member PCE Lead**
- **g. 60 Project Start Date**
- **h. 70 Project Finish Date**
- **i. 80 Classification PROGRAM**
- **j. 90 Classification FUND CODE**
- **k.** Uncheck the **Required** check box for **Project Finish Date**
- **l.** When finished with this window, **Save** and **Close** the screen to return to the **Projects, Templates** window

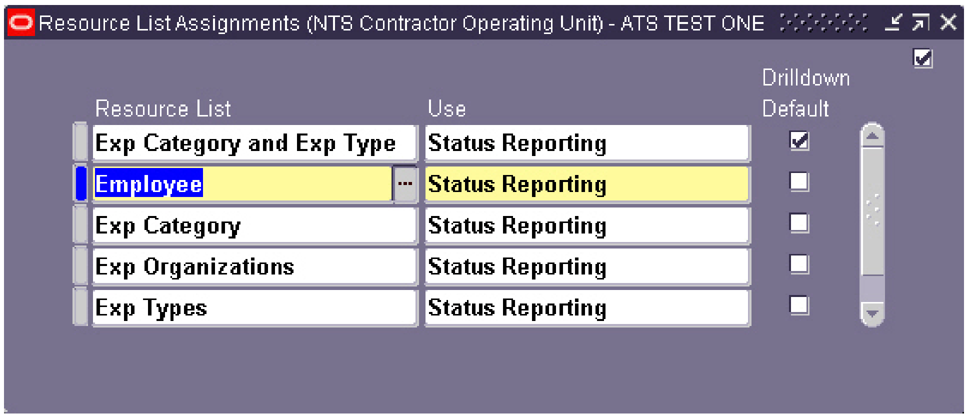


5. From the **Projects, Templates** window:

- **a.** Select the **Option** for **Structures**
- **b.** Then click the **Details** button to open the **Oracle Projects Structures** window
- **c.** Check the **Financial Structure** check-box
- **d.** Click the **Apply** button to return to the **Projects, Templates** window

6. From the **Projects, Templates** window:

- **a.** Use the scroll bar to scroll down to select the **Option** for **Resource List Assignments**
- **b.** Then click the **Details** button to open the **Resource List Assignments** window



7. In the **Resource List Assignments** window use the lookup list button, in each row, to enter the **Resource List**:

- **a.** **Exp Category and Exp Type** (this will automatically be entered as the first value in the table)
- **b.** **Employee**
- **c.** **Exp Category**
- **d.** **Exp Organizations**
- **e.** **Exp Types**
- **f.** **ORGANIZATION BY EXPENDITURE CATEGORY**
- **g.** Use the **New** tool  (the first tool on the toolbar) to add new rows as necessary
- **h.** Verify that the **Drilldown Default** check-box for **Exp Category and Exp Type** is checked
- **i.** When finished with this window, **Save** and **Close** the screen to return to the **Projects, Templates** window

8. **Save** the **Project, Templates** screen again and close the window