ONE CONNECT

ORACLE CLOUD

Log In Instructions

How To Log In To Oracle Cloud

Step 1:

- Open your web browser
- Click on the Dev environment link → https://iayzqy-dev4.fa.ocs.oraclecloud.com/ or add in your browser

Step 2:

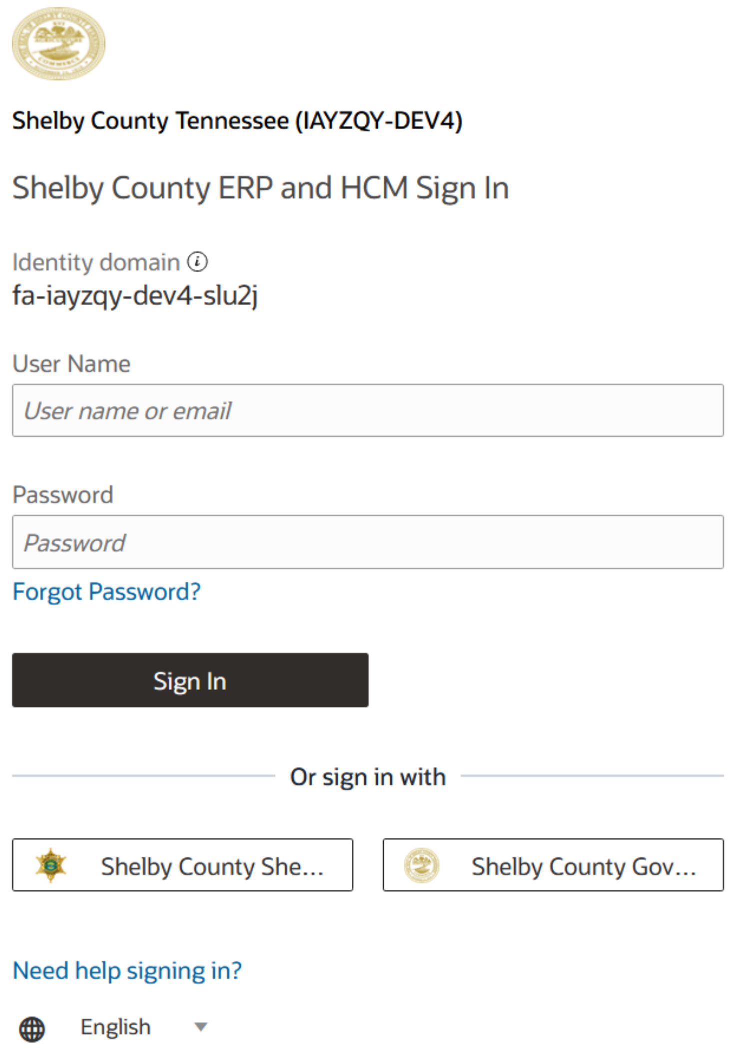
- Click on 'Company Single Sign-On' button.
- You will be redirected to your company's Single Sign-On (SSO) page.

Step 3:

- Enter your organization email address
- Enter your network password (the same password you use for Outlook)
- Click 'Sign In'

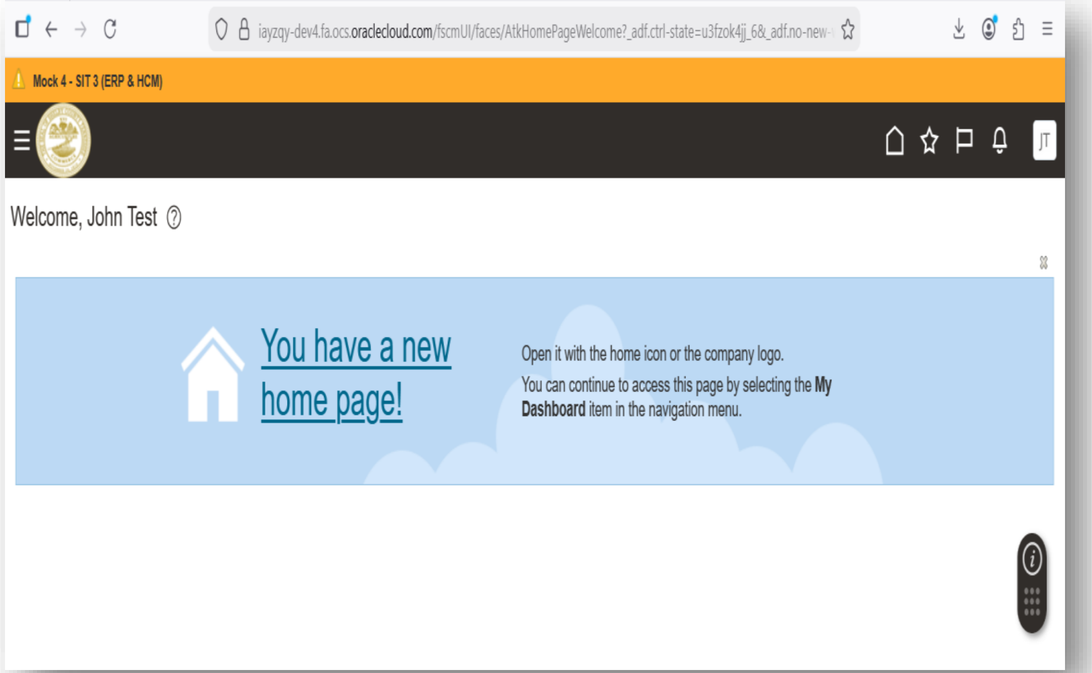
Step 4:

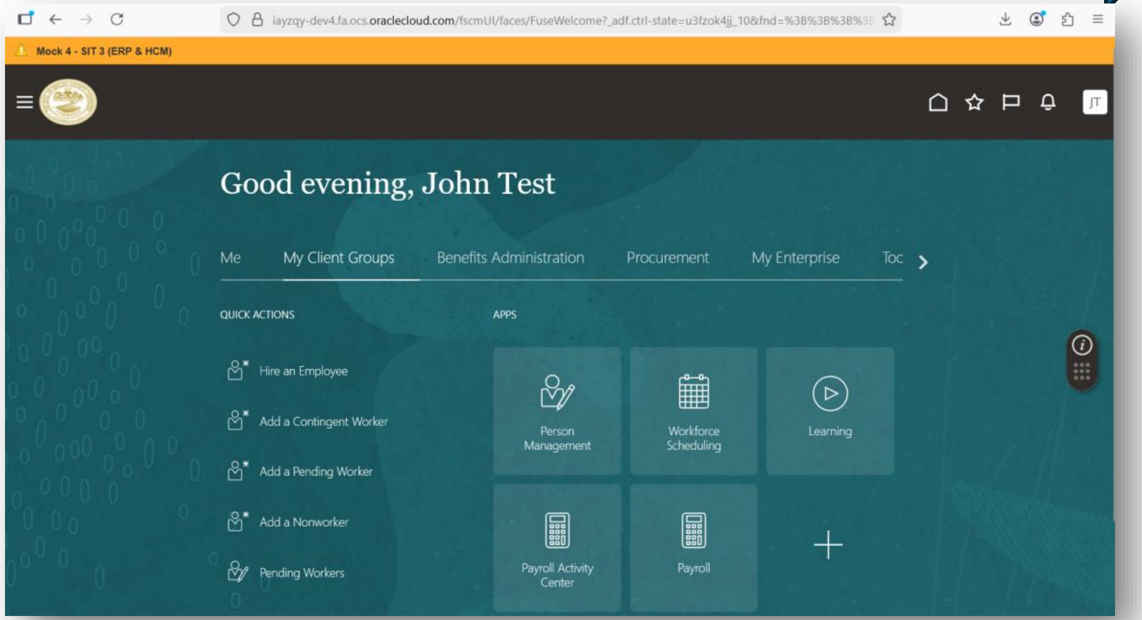
- Once verified, you'll be redirected to the Oracle ERP Cloud home page



How To Log In To OneConnect Oracle Cloud

- **Step 5:** After logging in, you will see the Oracle ERP Cloud dashboard.
- **Step 6:** Click on the ‘You have a new home page!’ link to view the home screen.





- **Step 7:** Click on icons or tiles to open specific applications.

Ground Rules

Identify how we will work well together today.

Ground Rules

- Be Present/Participate
- One conversation at a time
- Stay on topic (Parking Lot)
- Cell Phones on Silent
- No Texting Please
- Back from Breaks on Time
- Have FUN!

Using Oracle Guided Learning (OGL)

- After logging into the application, you will see the OGL icon on the right side of the page
- This widget contains embedded instructions for all processes. Click the "i" to view available guides.
- Use the Search field to search for a specific guide or navigate through the list.
- Click directly on a guide name to launch step by step directions.
- Note: guided learning must begin on the home screen.

Overview: Project Portfolio Management(PPM)

Technology, Processes & People

- Welcome & Introductions
  - Review Today's Agenda
- Overview:-
  - What it is, why it is important
  - Process & Subprocesses
- Navigation
  - Terms & Terminology
  - Navigating from Home Page
  - Using Oracle Guided Learning (OGL)
- Oracle – Project and Portfolio Management(PPM)
- Closing
  - Summary
  - Q & A
  - Evaluation
  - Next Steps

Projects :

1.Create Capital Projects

2.Import and Review CIP Project Cost

3.Review Accounting for CIP Project Cost

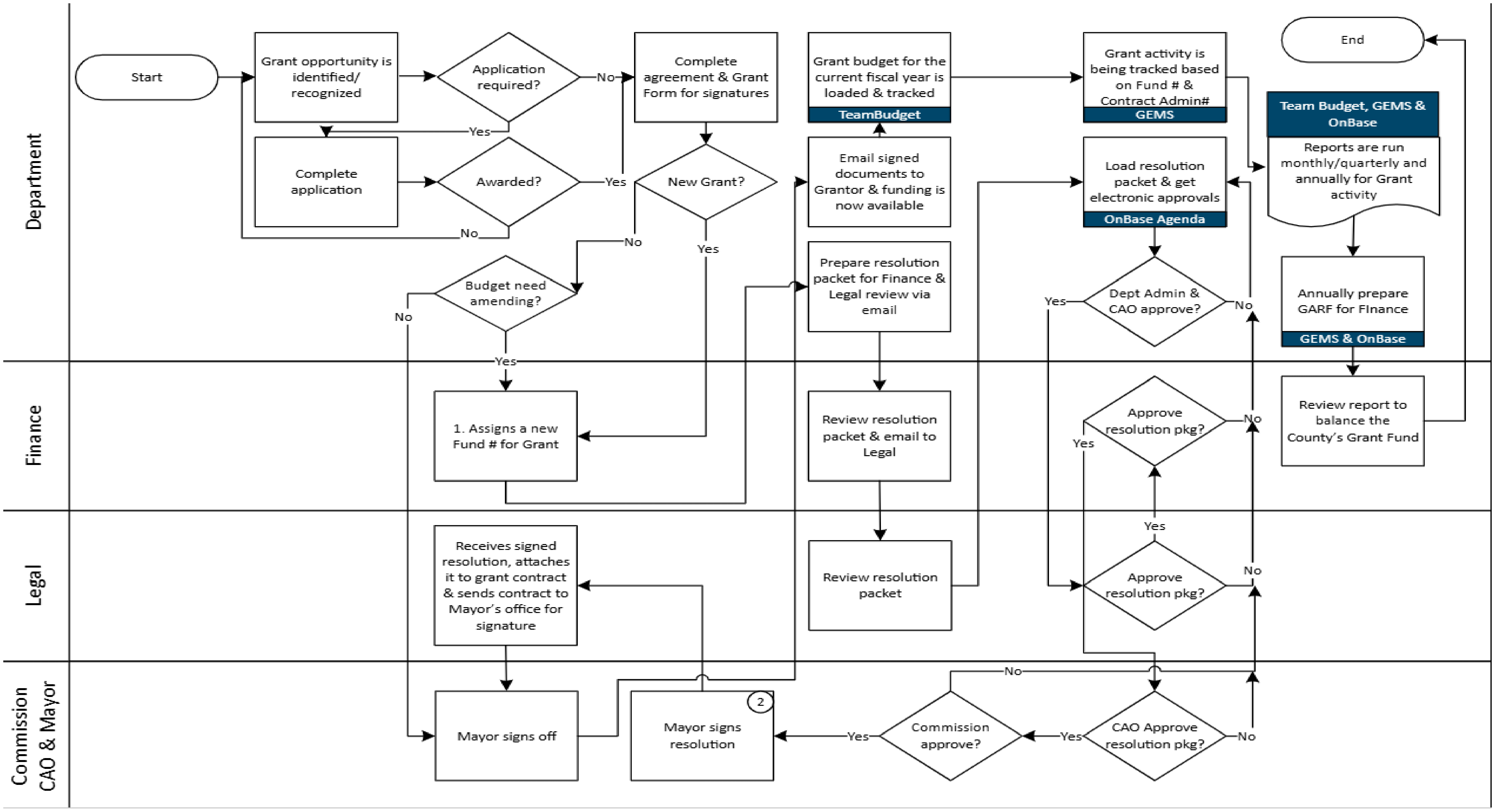
Grants :

- Create Federal award with single project and roll forward budget spanning multiple years

Grants Management

Grants Management helps organizations manage funding received from external sponsors such as federal, state or private agencies to support specific projects or programs.

Current Process – Grant Management



Create Federal award with single project and roll forward budget spanning multiple years:

A Federal Award is created for Funding received from a federal Sponsor and is associated with one single project.

The award budget spans multiple years, and any unspent budget from one fiscal year is rolled forward to the next year automatically . This allows project to continue without creating new projects each year. This setup is commonly used for long term federal grants that run for several years under one agreement .

Steps:

- Create Federal Award from Template
- Create Sponsored Project
- Associate Fund value to the Sponsored Project
- Submit the Project for Approval
- Associate Project to the Award
- Create Funding and Associate the Funding to the Project
- Create Cost Budget - Create Budget Lines Manually
- Submit Budget for Approval
- Submit Contract

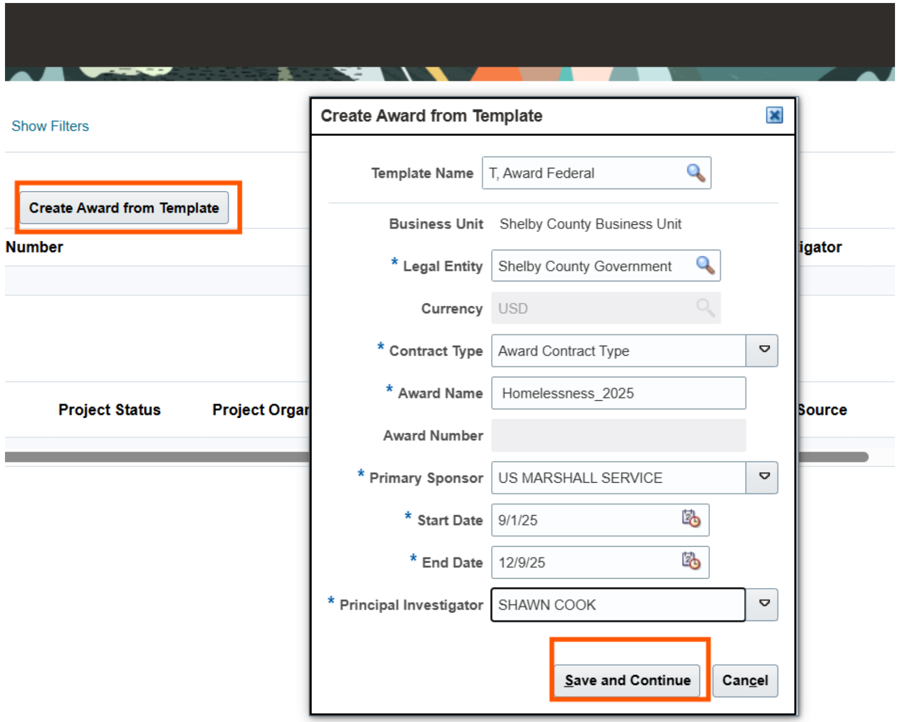
Steps:

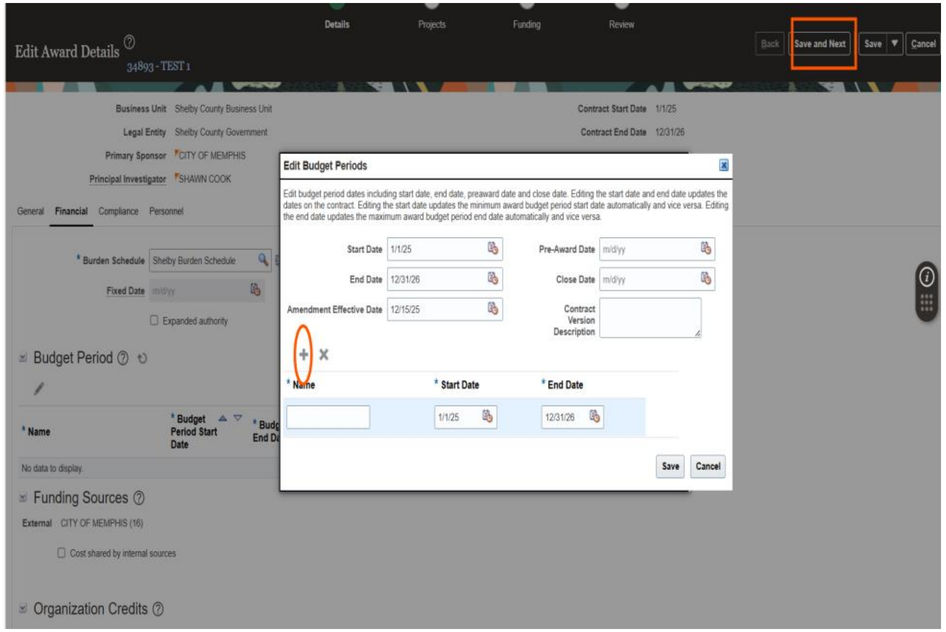
1.Create Federal Award from Template :

1.Click Navigator

2.Go to Grants Management

3. Click Awards



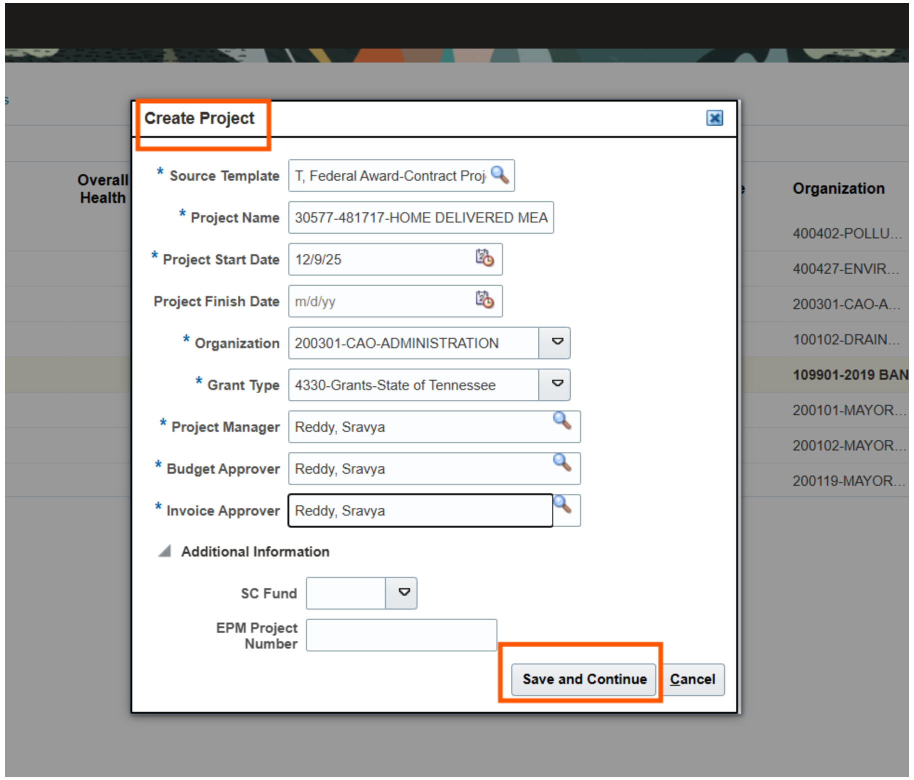


4. Click On Create Award from Template

5. Enter all Required Fields

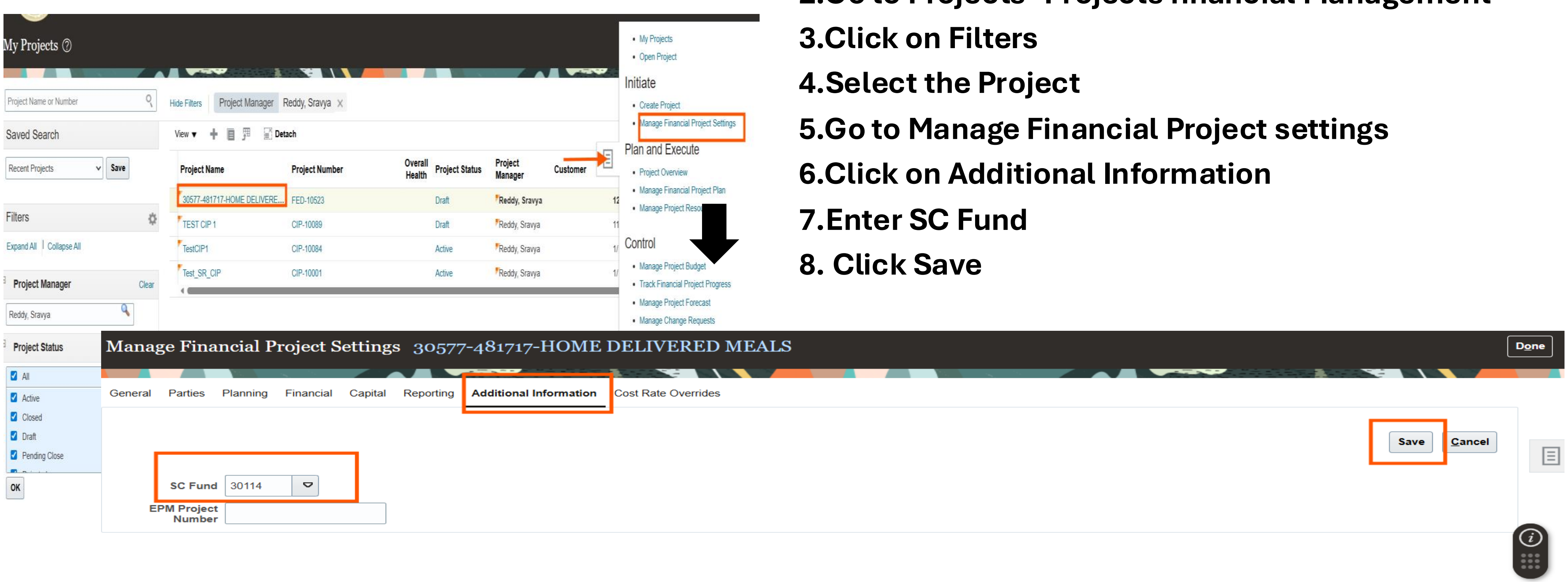
6. Click on save and Continue

2. Create Sponsoring Project



1. Click Navigator
2. Go to Projects-Projects Financial Management
3. Go to Task Panel
4. Go to Initiate-Create Project
5. Fill required details.
6. Click save and continue

3. Associate Fund value to the Sponsored Project



1.Click Navigator

2.Go to Projects- Projects financial Management

3.Click on Filters

4.Select the Project

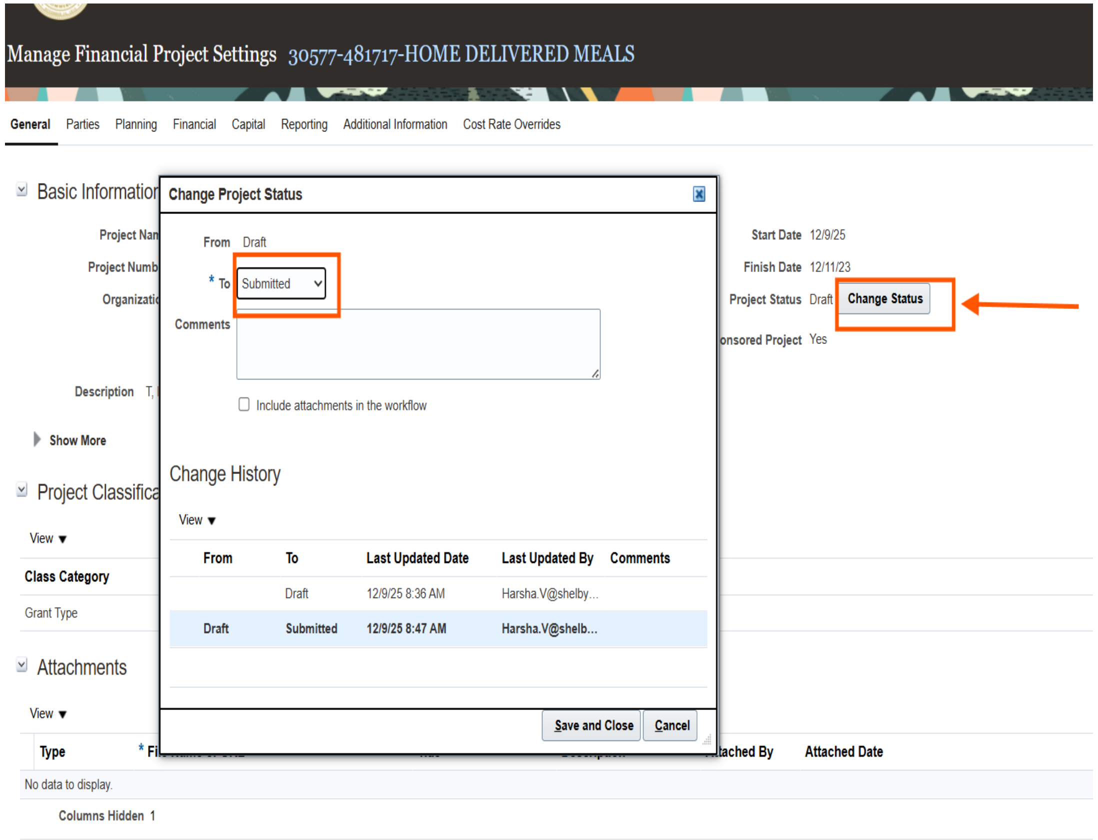
5.Go to Manage Financial Project settings

6.Click on Additional Information

7.Enter SC Fund

8. Click Save

4.Submit the Project for Approval



1.Go to Manage Financial Settings

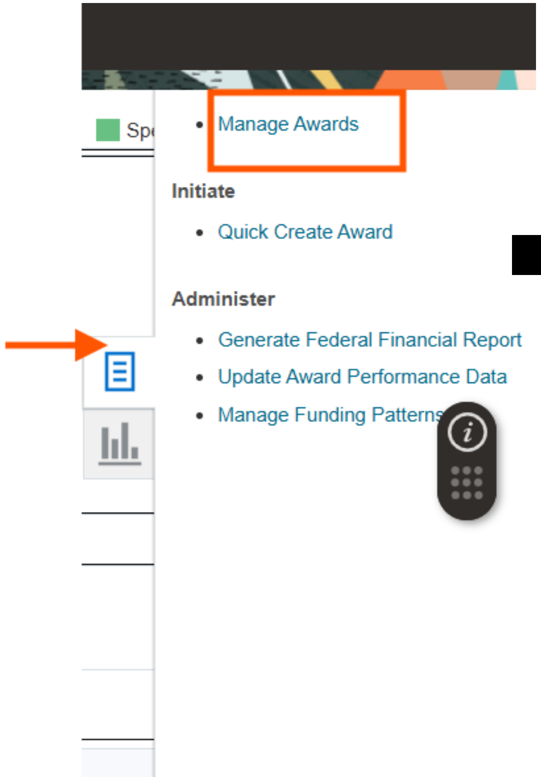
2.Click on General Info Tab

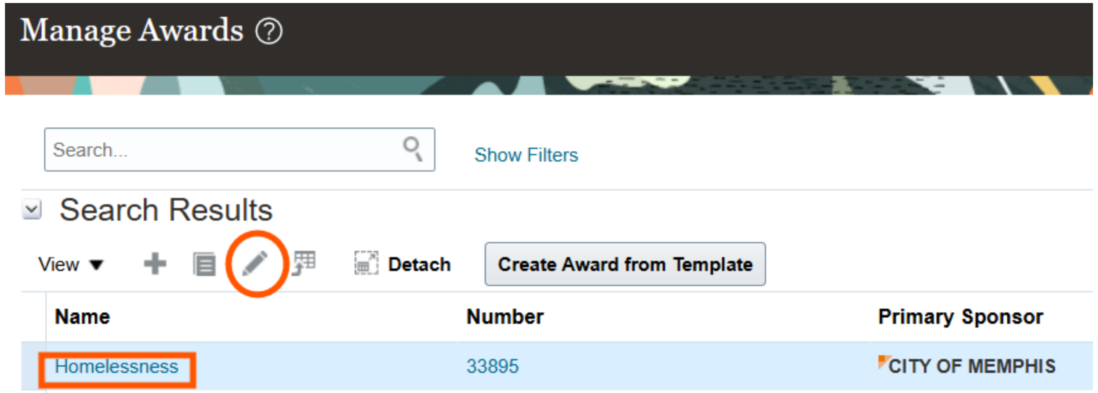
3. Change Project status to Submitted

4. Project has been Submitted , sent for Approval Level.

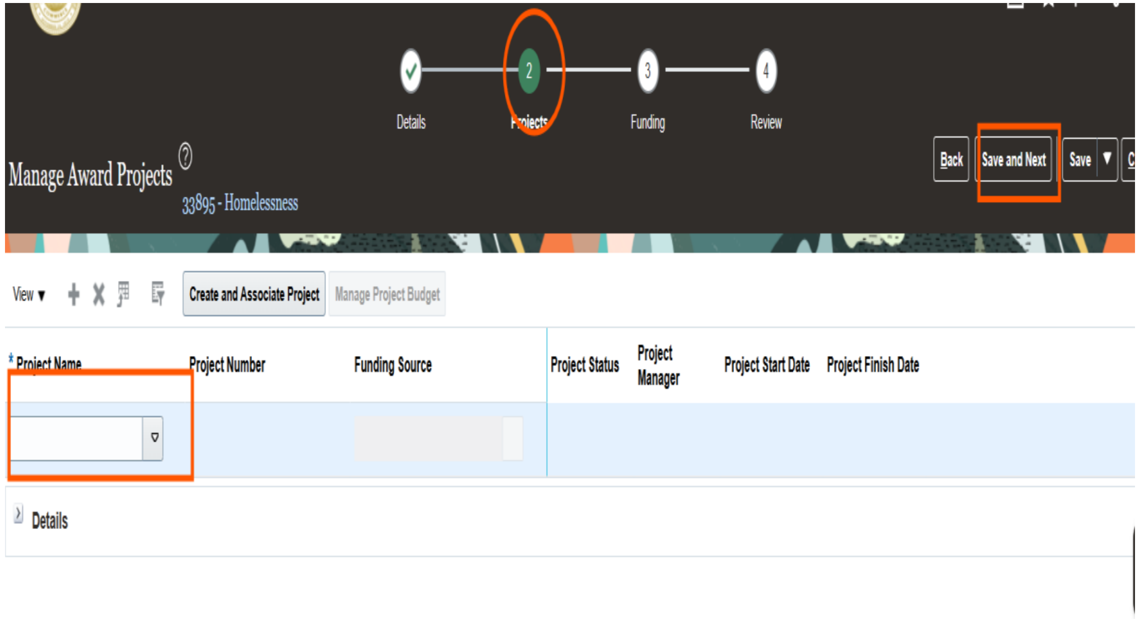
5. Associate Projects to the Award

We Associate Project to the Award so sponsor funding can be used for that project



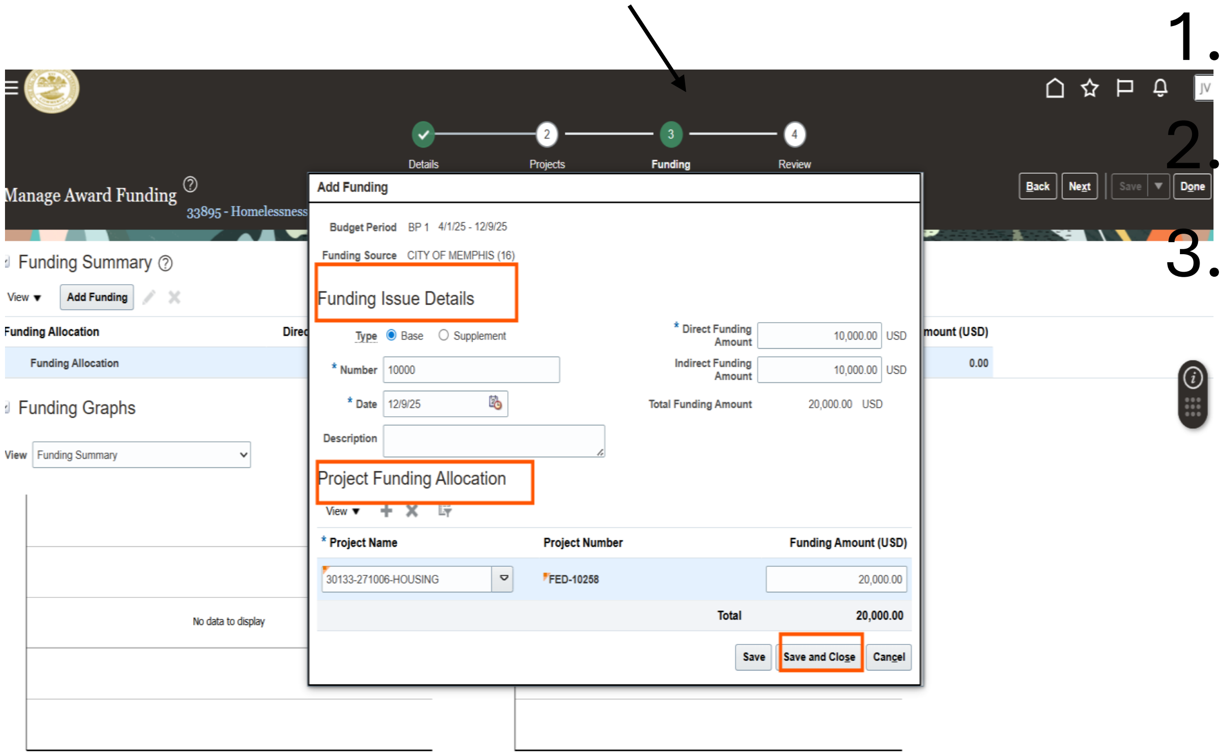


1. **Go to Manage Awards**
2. **Search Award Name**
3. **Select that Award, click Edit option**



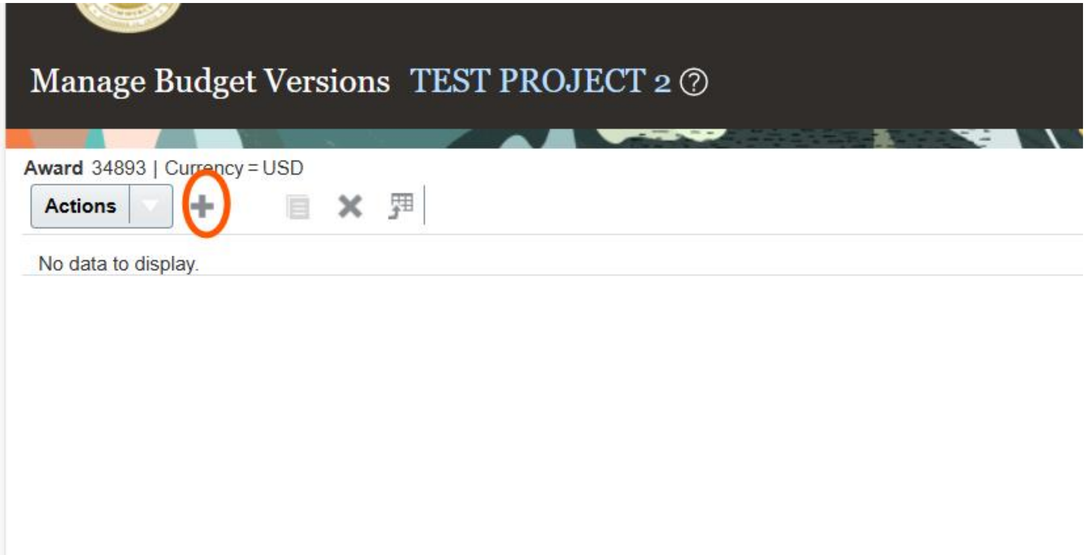
- 4. Go to Project Tab
- 5.Link Project to the Award
- 6. Click save and next....

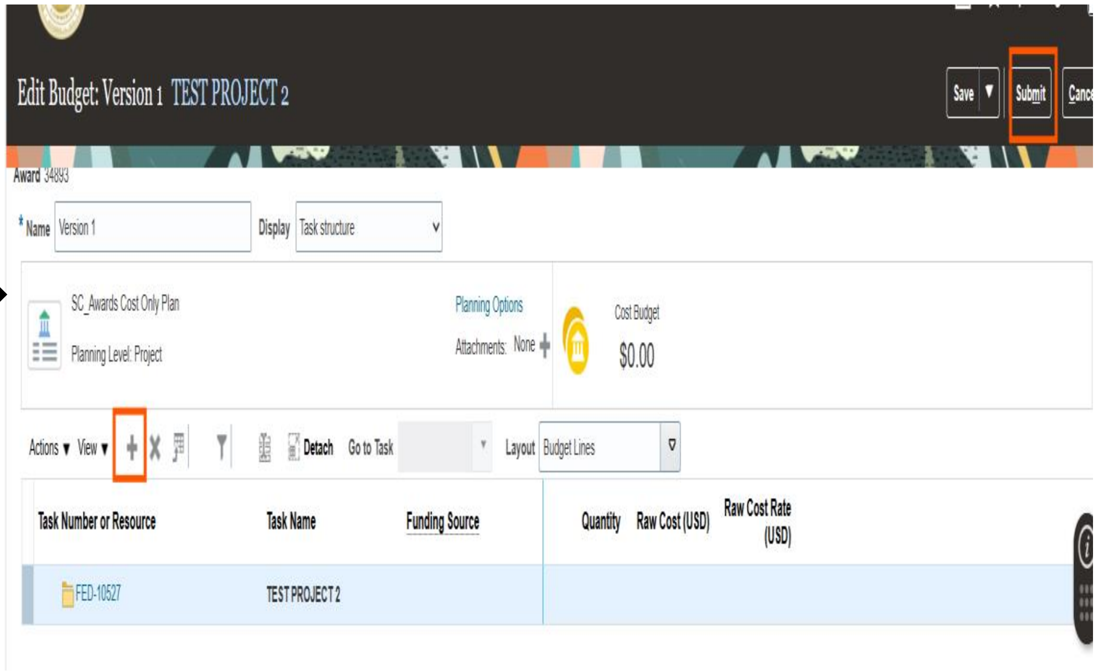
6. Create Funding and Associate the Funding to the Project



1. Click on Funding
2. Fill Required Details
3. Click Save and close.

7. Create Cost Budget - Create Budget Lines Manually





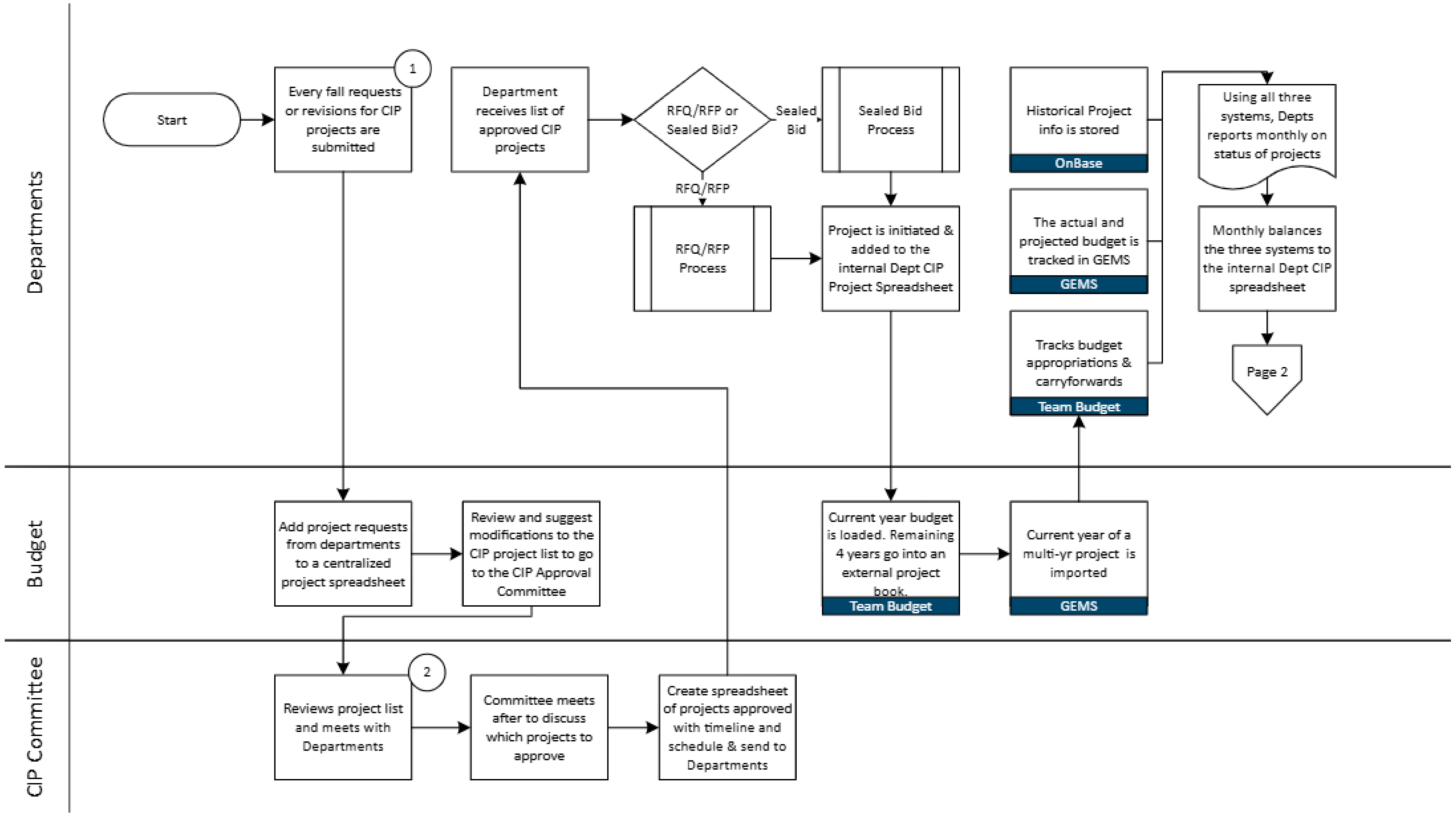
1.Capital Project

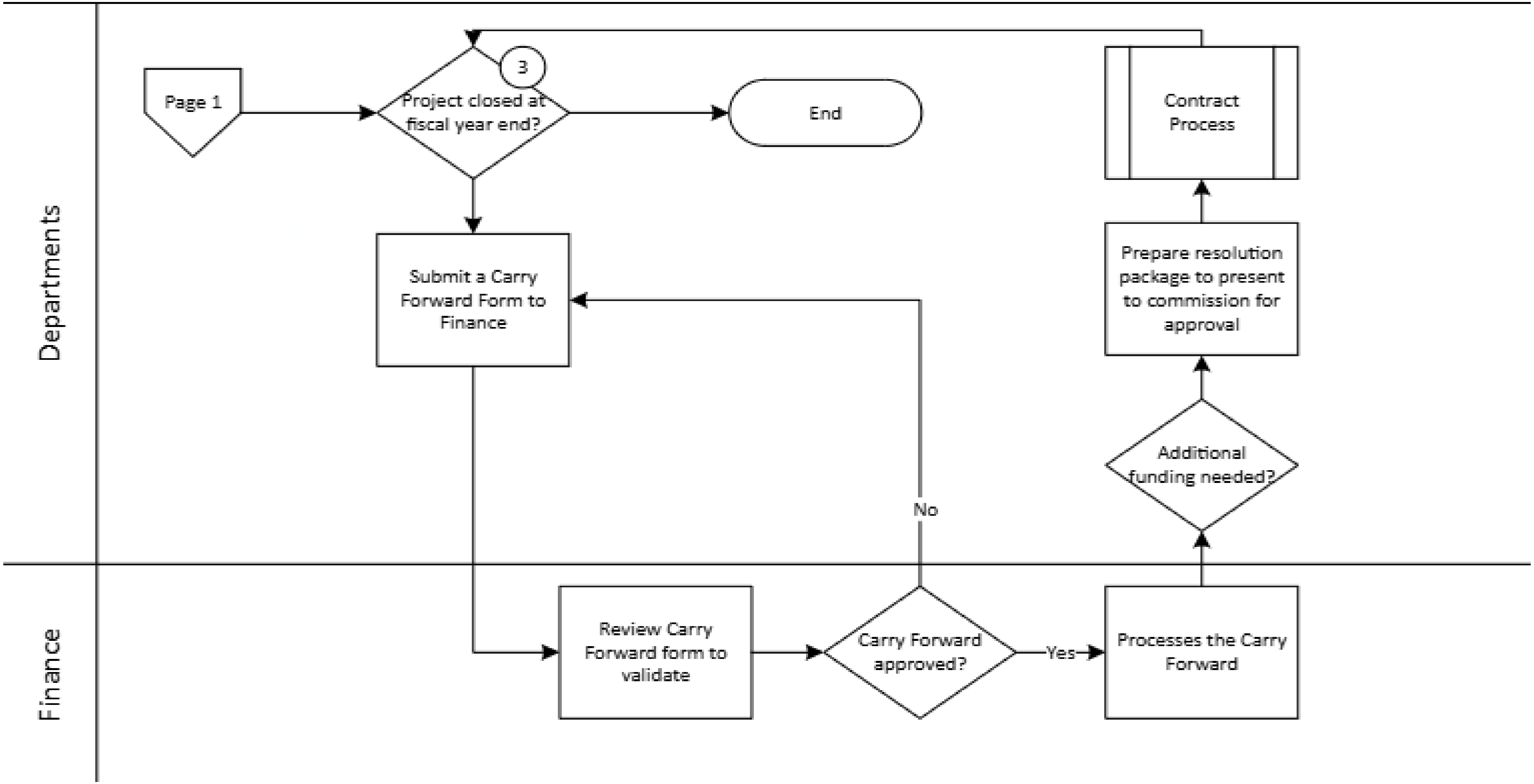
Capital Project Creates Long term Asset and cost will be directly go to the Fixed Assets.

Types of Capital Projects :

1. **New Construction Projects** : Buildings , Roads, Hospital, Airports
2. **Renovation Projects** : Renovation of Government Buildings
3. **Infrastructure Projects** : Water Systems, Power Plants
4. **IT Capital Projects** : Data Centers, Purchase and install servers.
5. **Land & Facility Development Projects** : Parking lot construction, Stadium Improvements

Current Process- Capital Projects




Departments
Finance
Page 1
Project closed at fiscal year end?
3
End
Contract Process
Prepare resolution package to present to commission for approval
Additional funding needed?
Submit a Carry Forward Form to Finance
No
Review Carry Forward form to validate
Carry Forward approved?
Yes
Processes the Carry Forward

Creating a capital project includes the following steps:

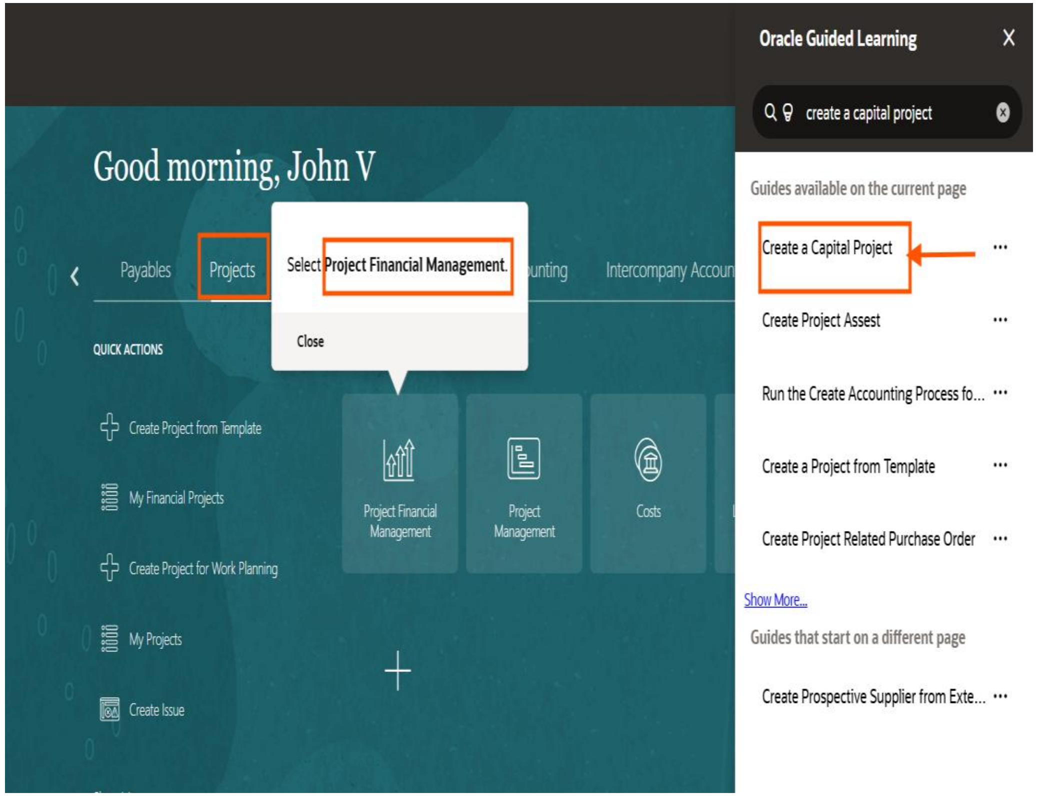
- Create Project by using CIP Template
- Associate Fund value to the CIP project
- Submit and approve project
- Approve Project with Project Approval Workflow
- Notification of Approved Project Status Change Approval Workflow
- Create Cost Budget - Create Budget Lines Manually
- Submit Budget with Budget Approval Workflow

Step 1: Create Project by using CIP Template

- **A CIP template is a ready-made setup used to create capital projects easily.**
- **It already contains default project Structure , tasks, financial and asset settings.**

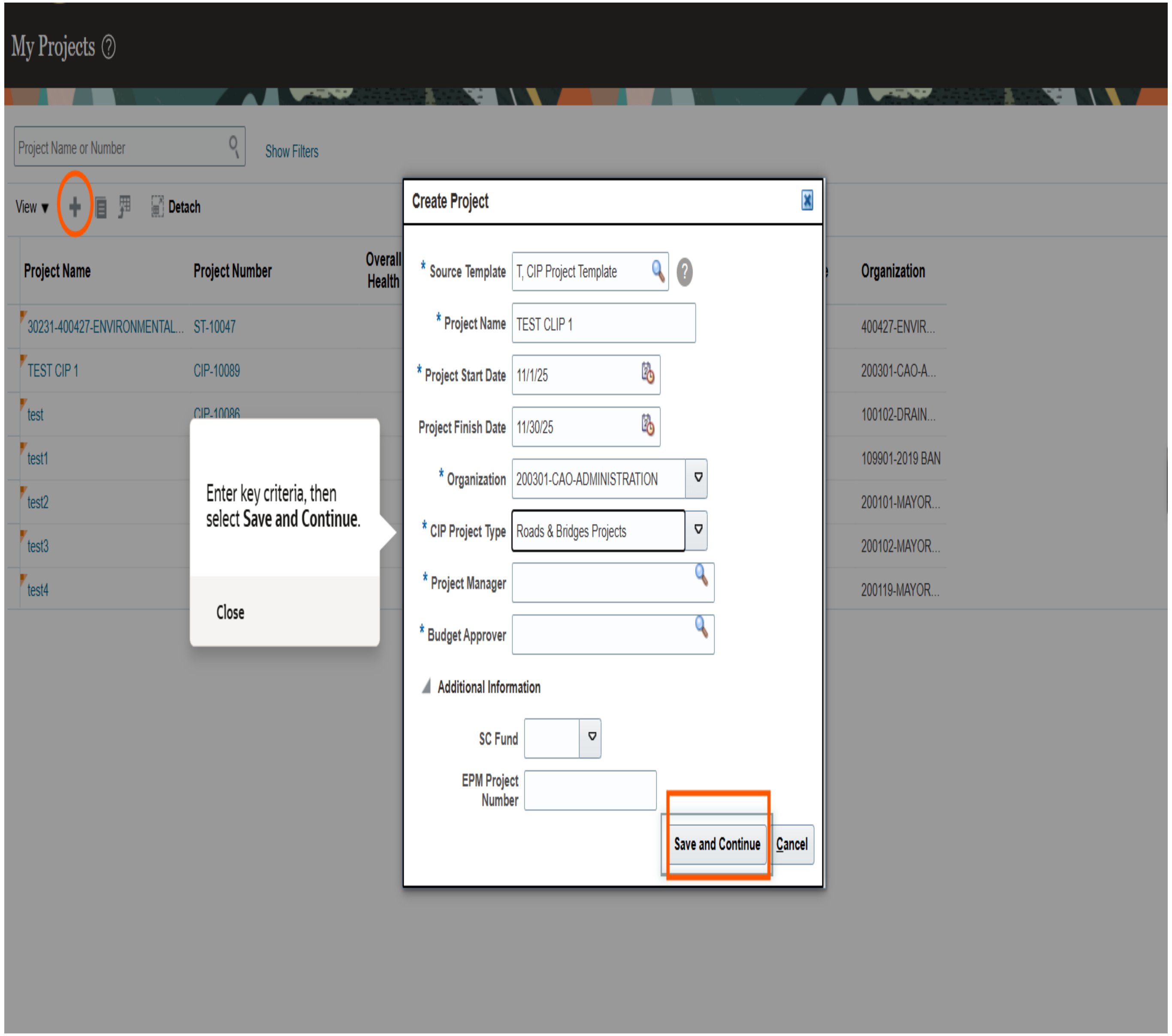
Navigation :

1.Projects > Projects Management



2.Click Create Project From Template

3.Select the CIP template , enter Project Name , Dates, BU. Then click save and continue .

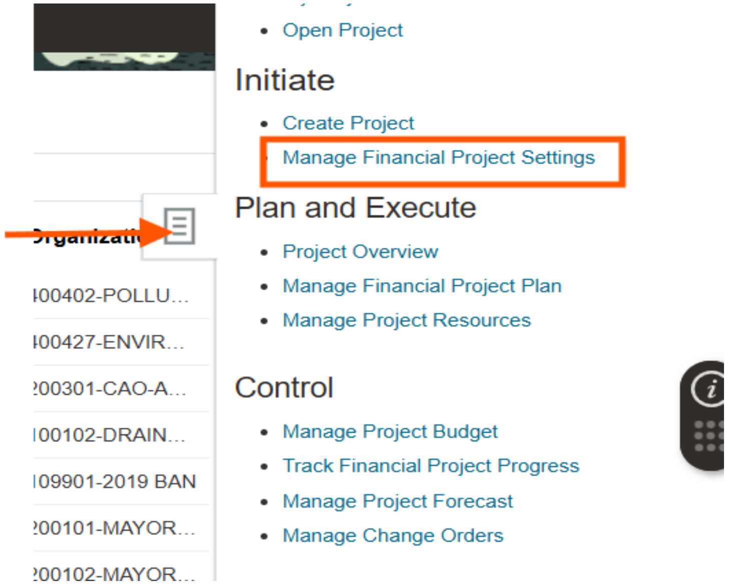


Step 2:Associate Fund value to the CIP project

Attach the correct fund or funding source to the capital project .

Navigation:

- **From Project Screen, Go to Task panel**
- **Click Initiate> Manage Financial Project settings**
- **Go to additional Info Tab**
- **Enter/ update SC Fund(50909)**
- **Click save**



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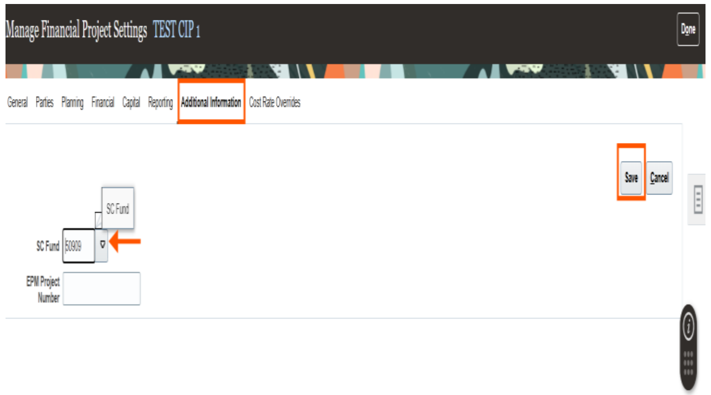

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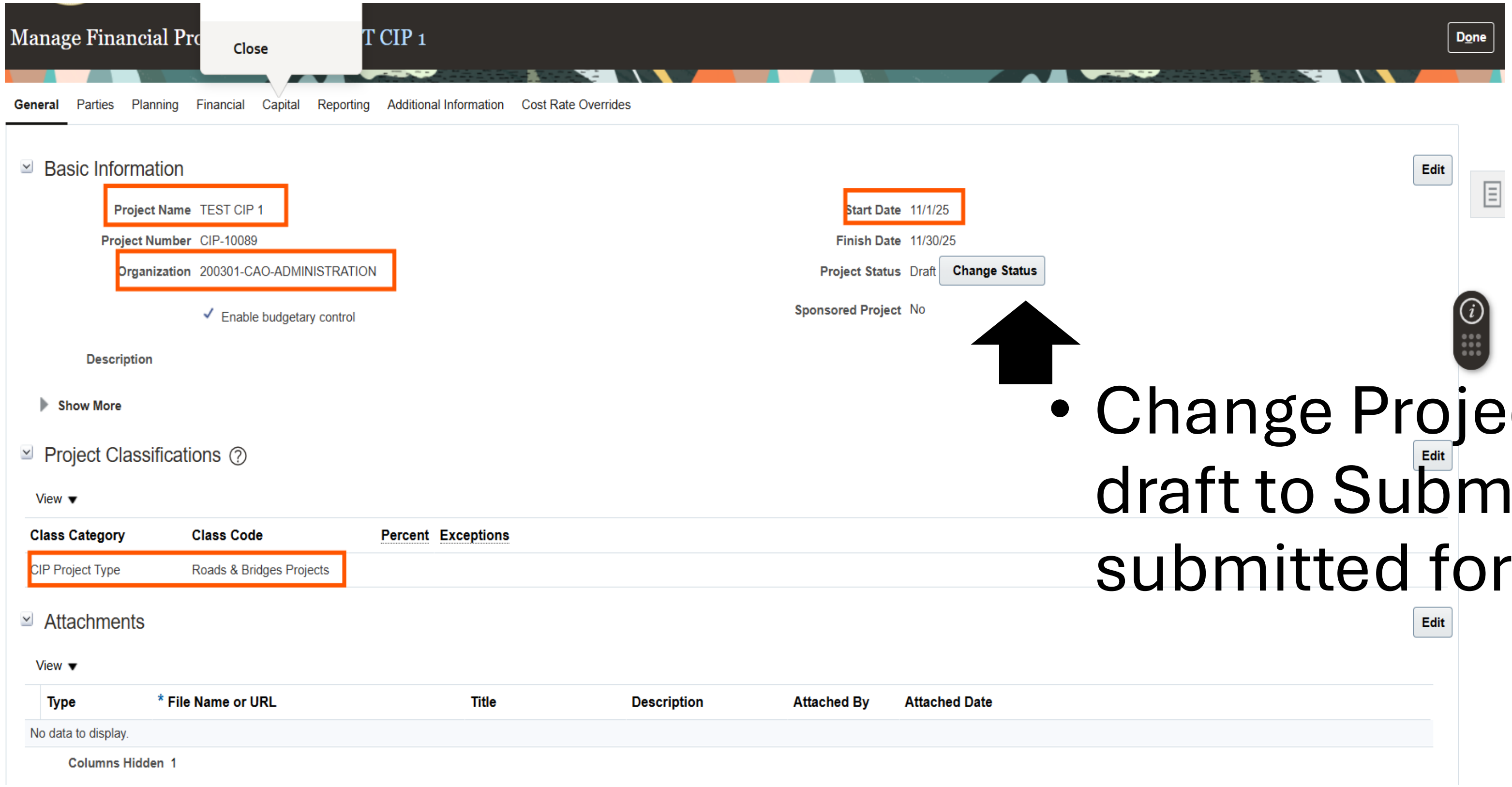
Step 3 :Submit and approve project

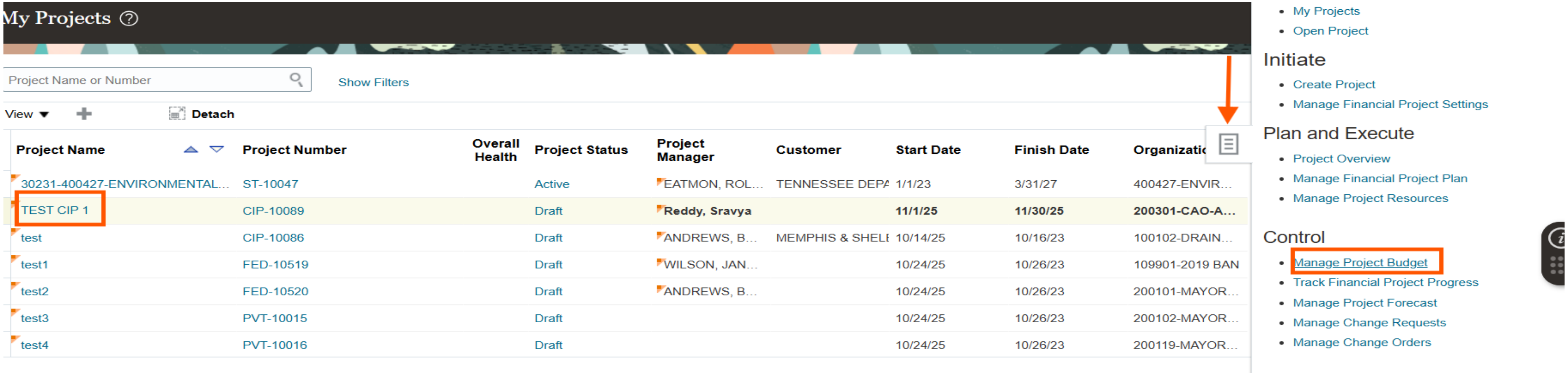


- Change Project status from draft to Submitted. The project submitted for Approval.

Step 4 :Approve Project with Project Approval Workflow

Project is Approved

Step 5 :Create Cost Budget - Create Budget Lines Manually

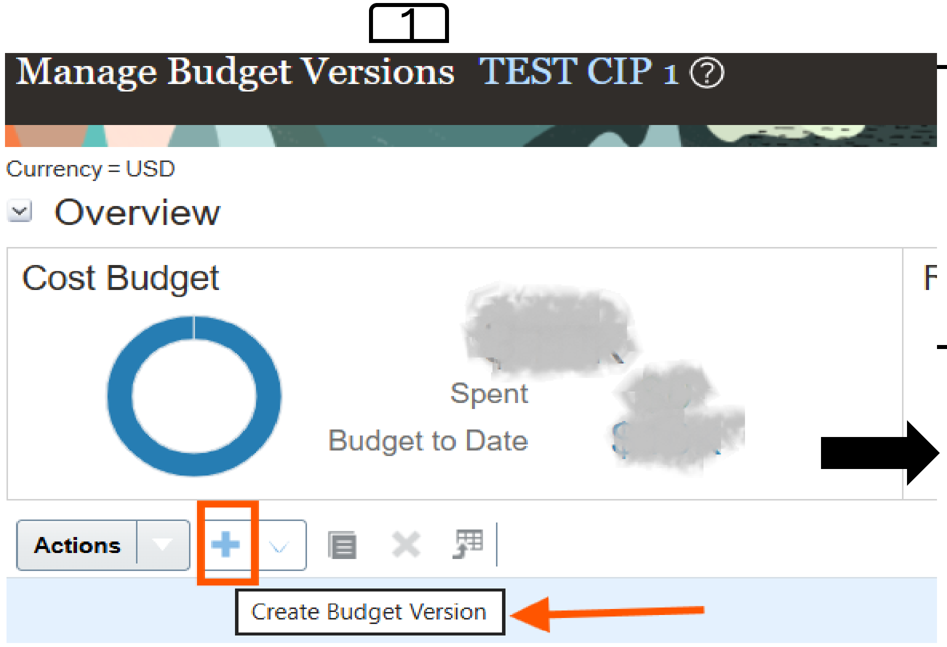


Navigation:

1.Projects – Select the project

2.Go to Task panel

3.Click control-Manage Project Budget

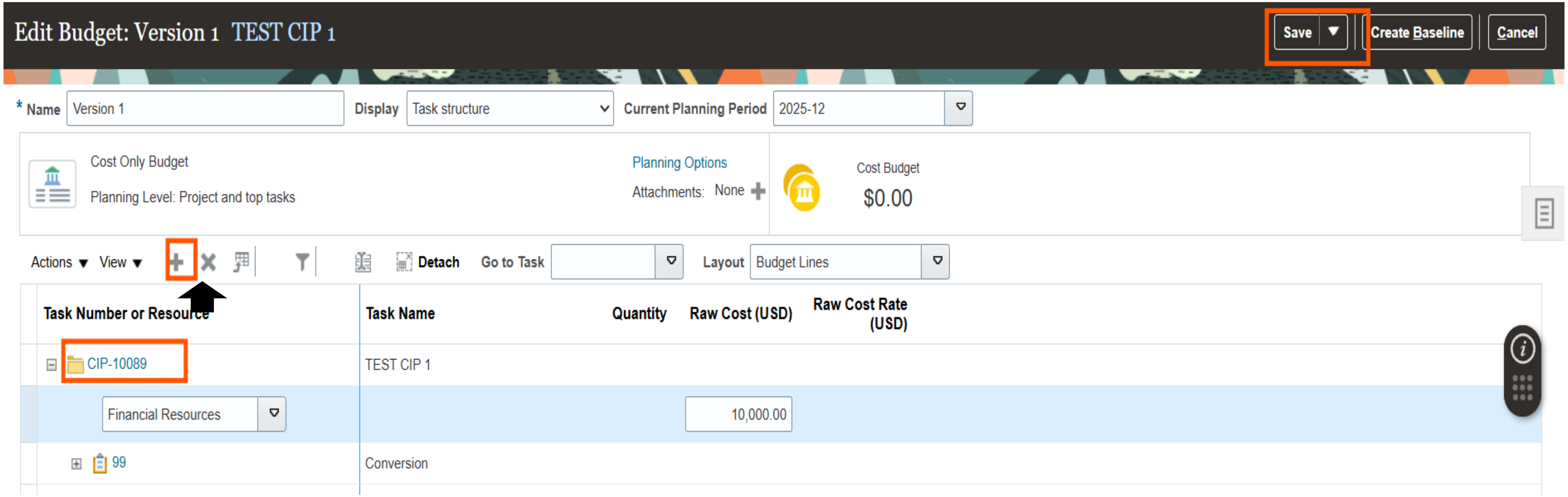


4.Click Create Budget Lines Manuall

5.Enter required details-Cost Only Budget

6.Enter Version Name

7. Click Save



8. Select Project- Click Add Icon

9.Choose Financial Resource

10. Enter Raw Cost

11. Click save and Close

12. Budget has been sent to the approver for approval.

2. Import and Review CIP Project Cost

This Process is used to bring project costs into Oracle PPM from different sources like Supplier Invoices , Expense reports . After importing , we review the costs to make sure they are accurate and correctly linked to the CP project.

CIP Project Costing Includes Following Steps:

- Import and Process Transactions from Payables - Expense Report
- Import and Process Transactions from Payables - Supplier Invoice

Step 1 :Import and Process Transactions from Payables - Expense Report

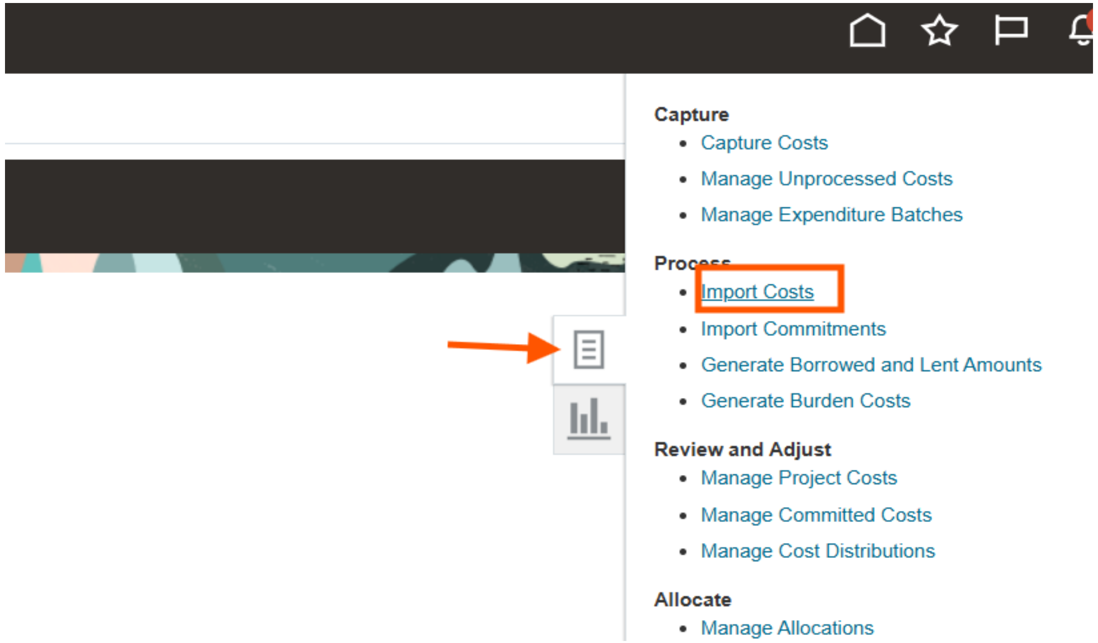
2.On the overview page, Click Tasks

3.Select process –Import Cost

4. Click Import Costs

1.Navigator- Projects – Cost

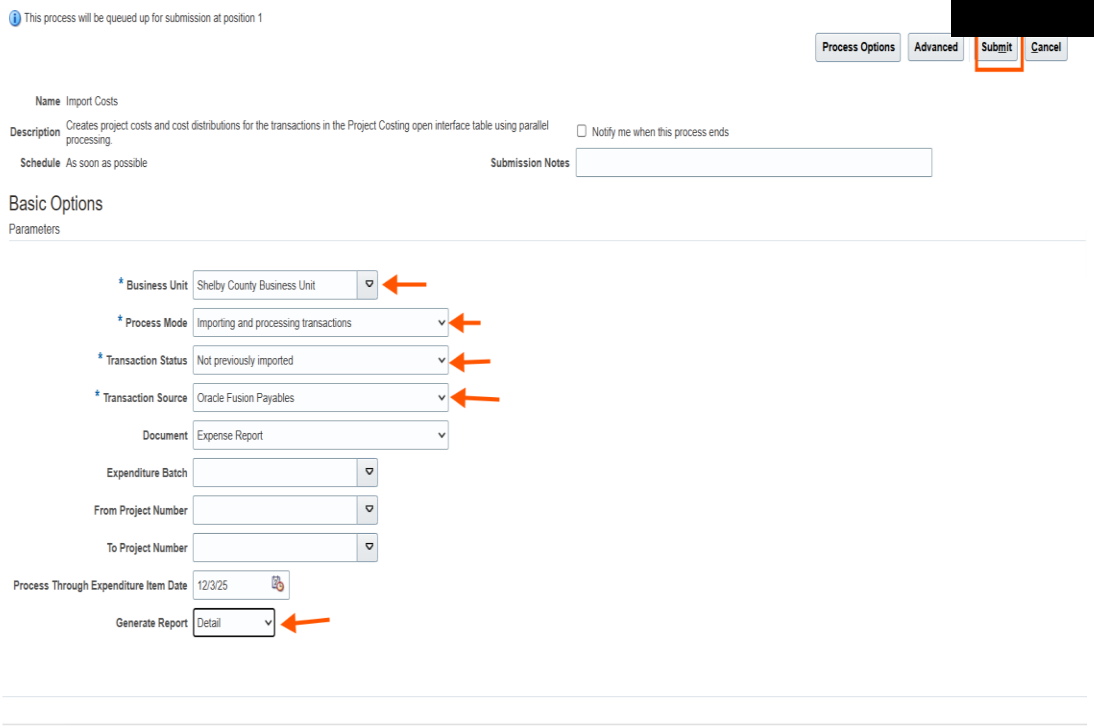
1

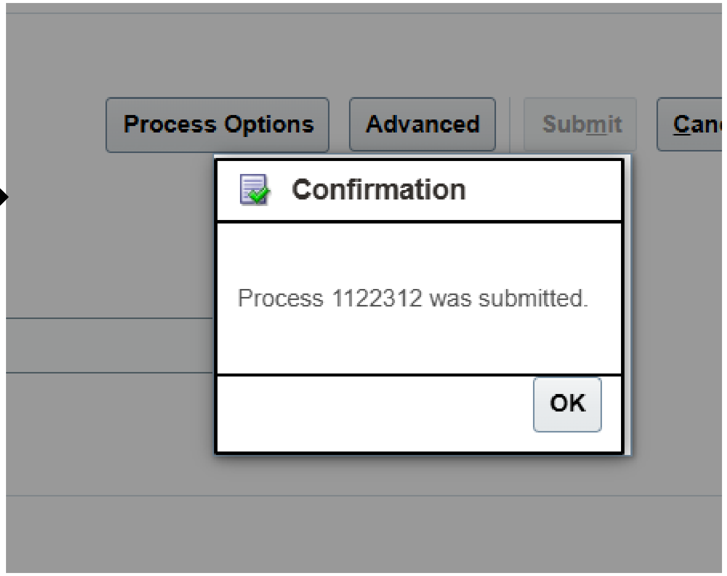


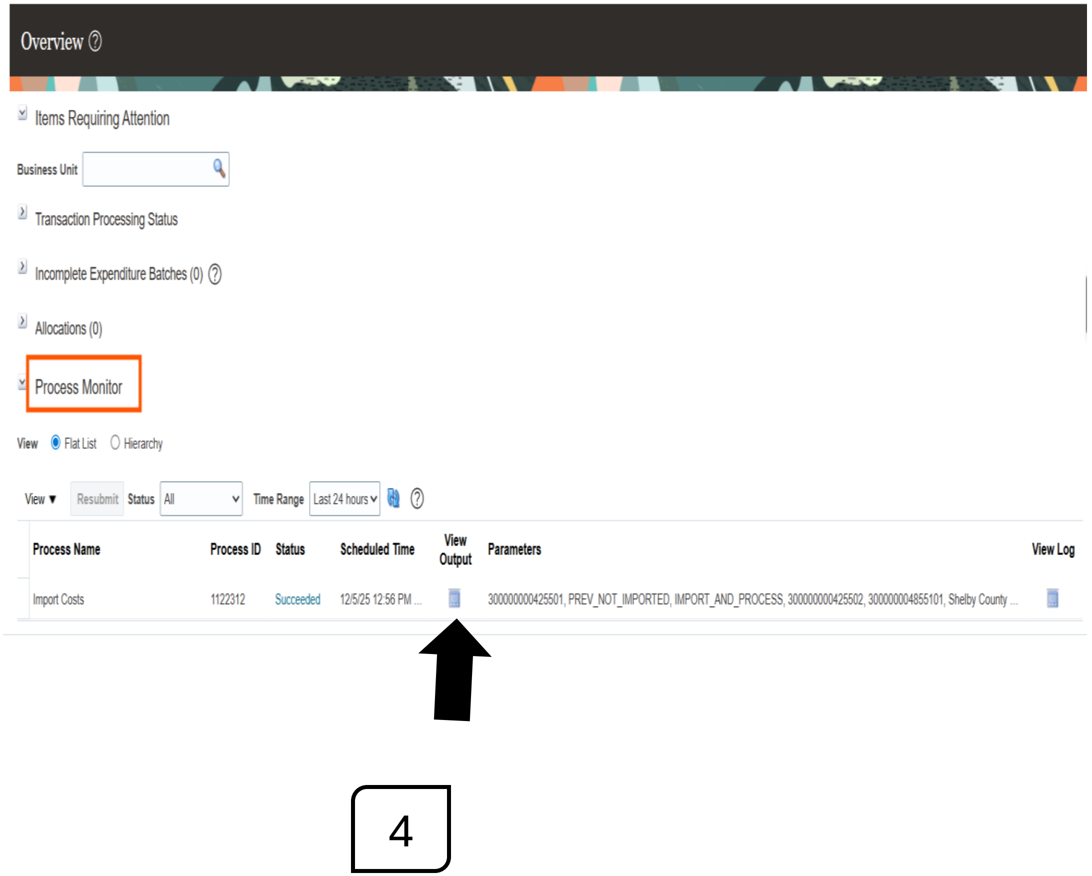
2

5. In the Import Cost page, Fill all required Information

6. Click Submit.

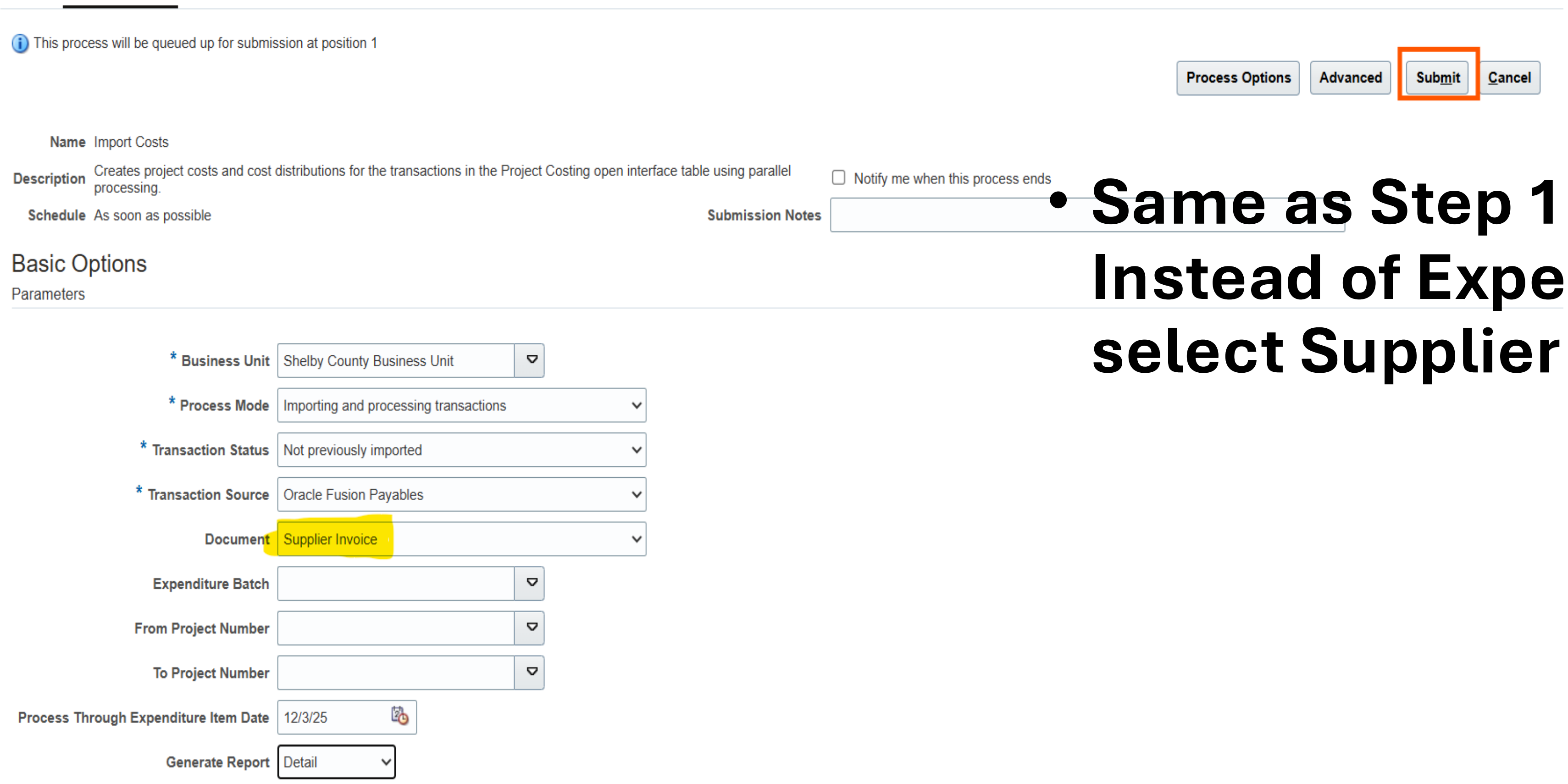






7. After Submit, go back to overview page
8. Scroll to the Process Monitor section
9. Click expand to see process list
10. Click Refresh Until the status shows Succeeded
11. Click View Output
12. Open PDF and check that there are no errors.

Step 2:Import and Process Transactions from Payables - Supplier Invoice



- **Same as Step 1 Process, Instead of Expense Report select Supplier Invoice.**

3.Review Accounting for CIP Project Cost

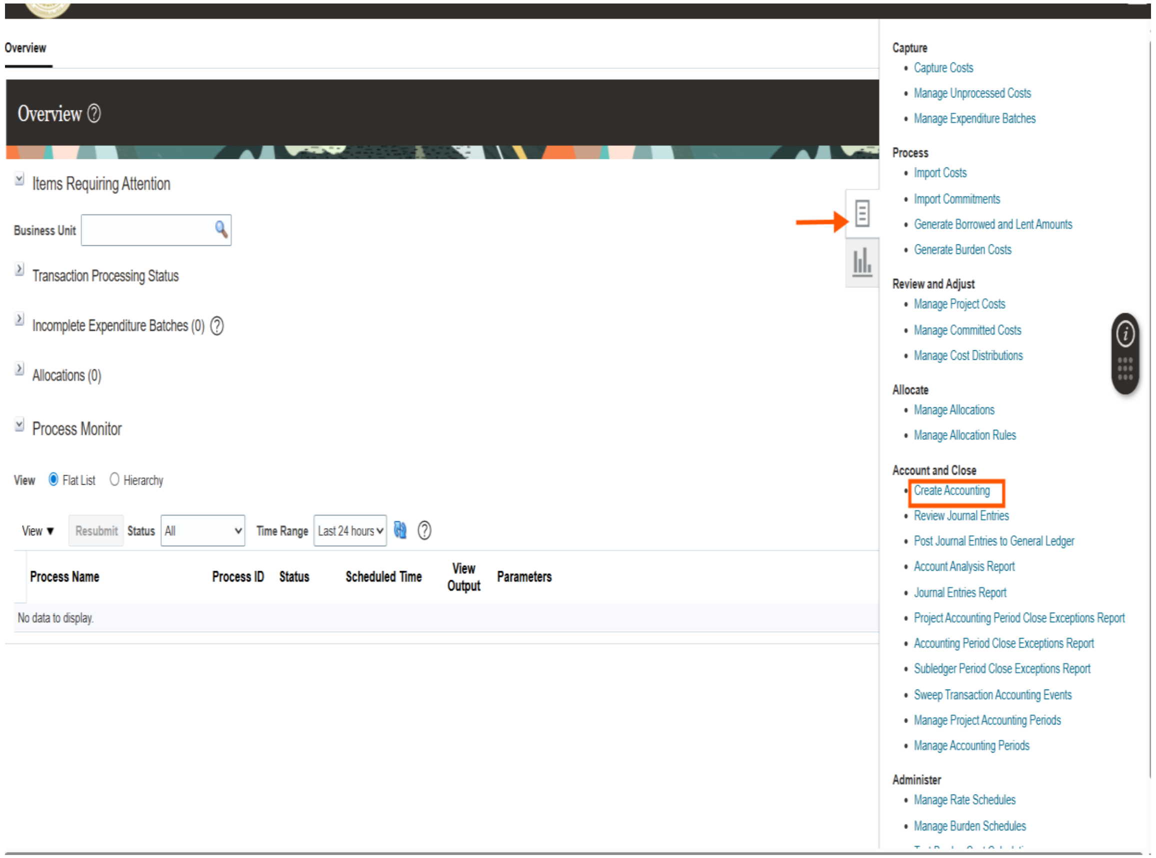
Step 1 :Create and view Accounting - Miscellaneous Cost

This Option is used to manually create costs that are not coming from payables or Expense Report

Example :

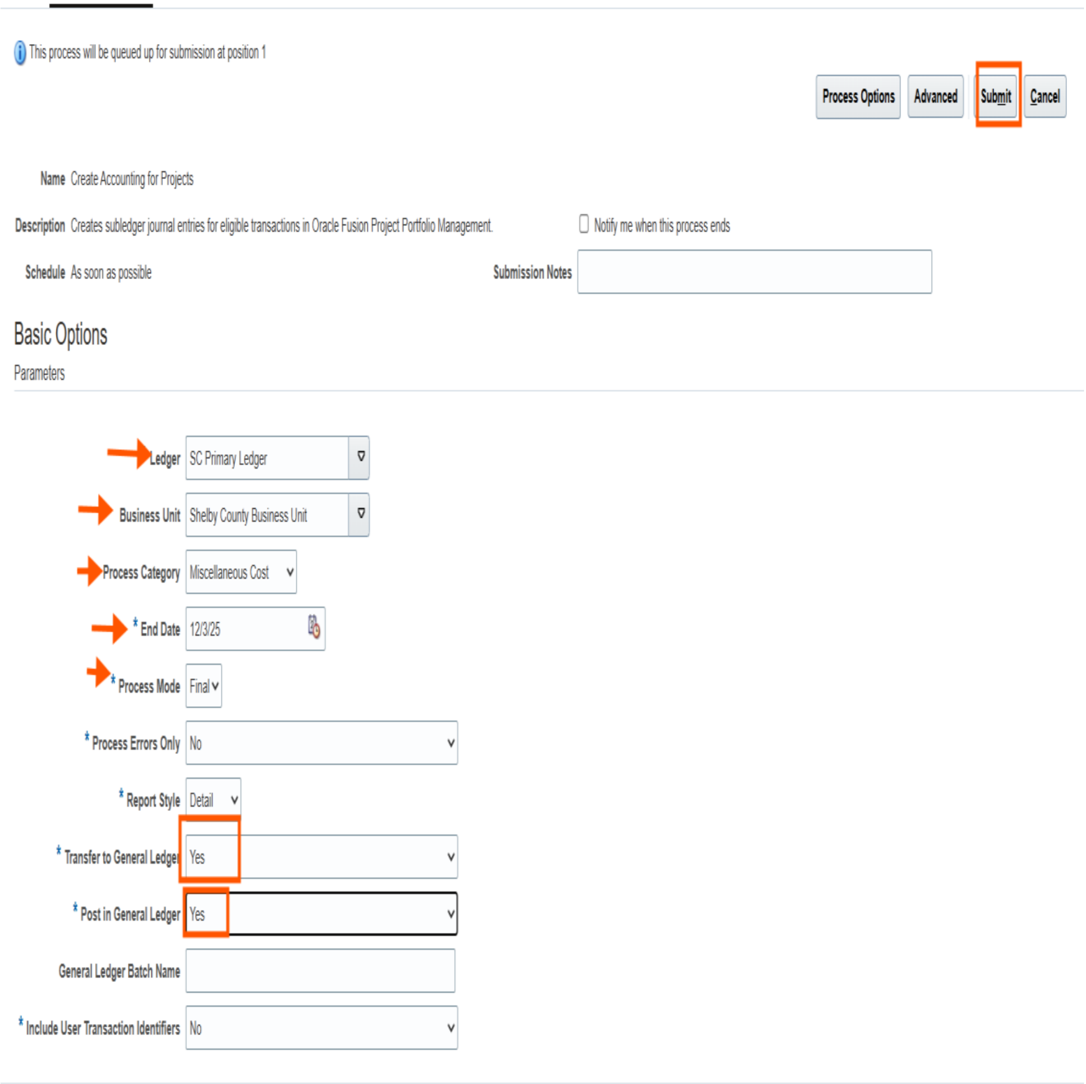
A Project Team purchased small construction Material like Screws, Bolts from local stores.

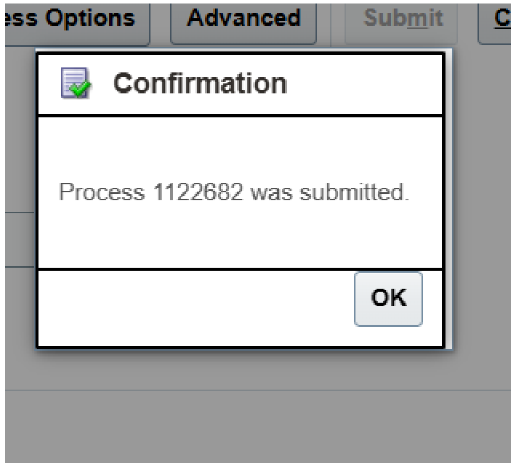
Since this is not purchased through a supplier invoice or expense report, we manually record this cost as a Miscellaneous cost in oracle.



1

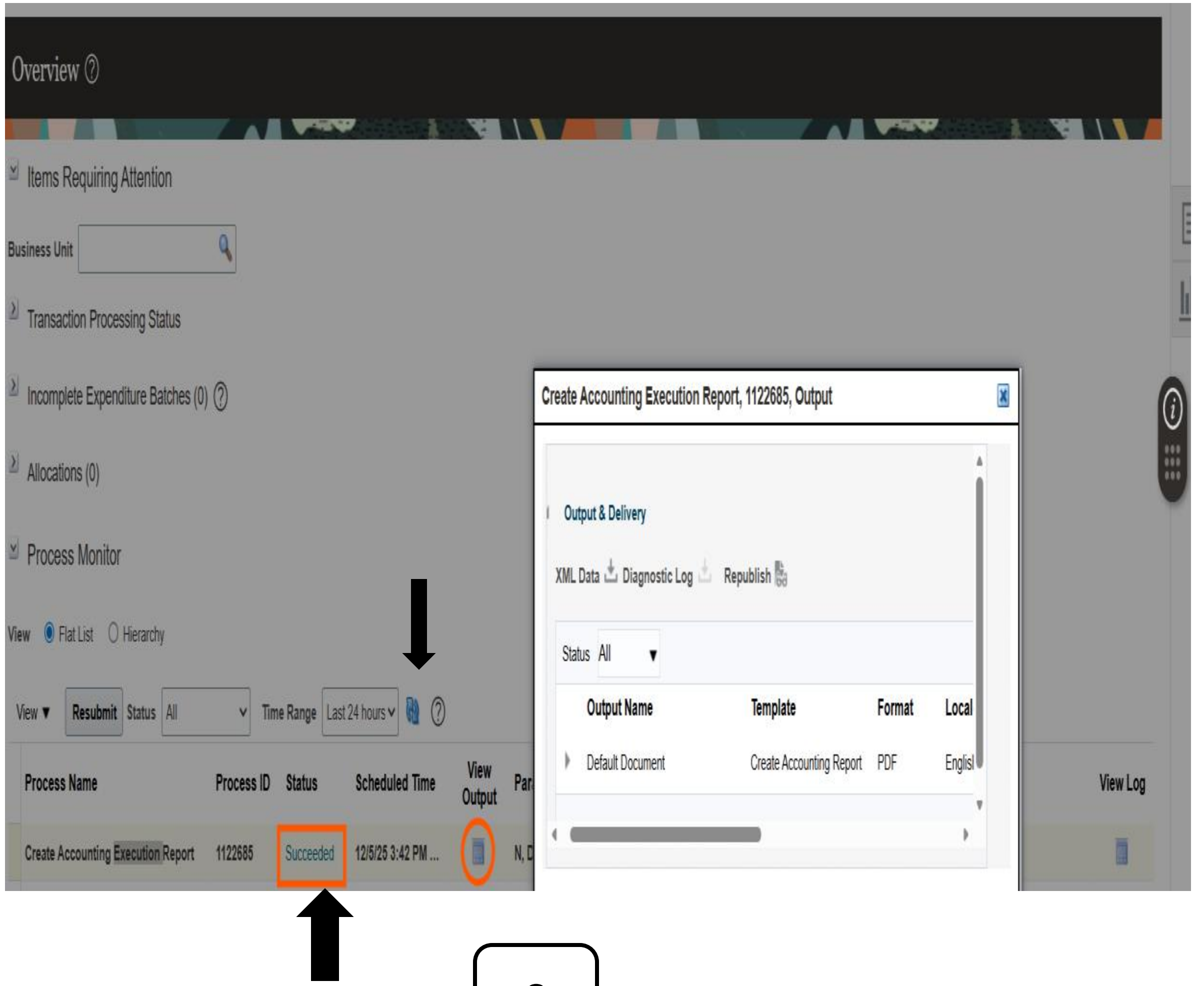
1. Go to Projects- costs
2. Click on costs link (overview page Opens)
3. Click the Task Panel
4. Go to account and close- create Accounting





5. Enter Required Fields (ledger, BU, Process Category

6. Click Submit



3

7. From Overview Page, Scroll to the Process Monitor Section

8. Click Refresh until the process status Succeeded

9.Select Create Accounting Execution Report

10.Click View Report

Question & Answer Time

Next Steps

- After leaving this session, what will you do:
- First
- Next
- Next
- Next…

What's Next?

Homework

- Review Notes & OGL Guides
- Huddle/Debrief with your Team
- Practice Logging In

- Support: OneConnect.help@shelbycountytn.gov

- Link To One Connect : https://oneconnect.shelbycountytn.gov

Thank You for your active participation in today's session!