PROJECT PORTFOLIO MANAGEMENT

PEOPLESOFT PROJECTS (ESA) TO PRIMAVERA P6 INTEGRATION

PROJECT MANAGEMENT EXCELLENCE

KEY FEATURES

- Business analyst-configurable
- Metadata-driven, flexible data transfer capabilities
- Financial data transfer from PeopleSoft to Primavera P6
- Project data transfer from Primavera P6 into PeopleSoft and vice versa
- Master resource data transfer from PeopleSoft Projects to Primavera P6
- Timesheet import from Primavera P6 and hours worked export from PeopleSoft
- Extensive error and status logging

KEY BENEFITS

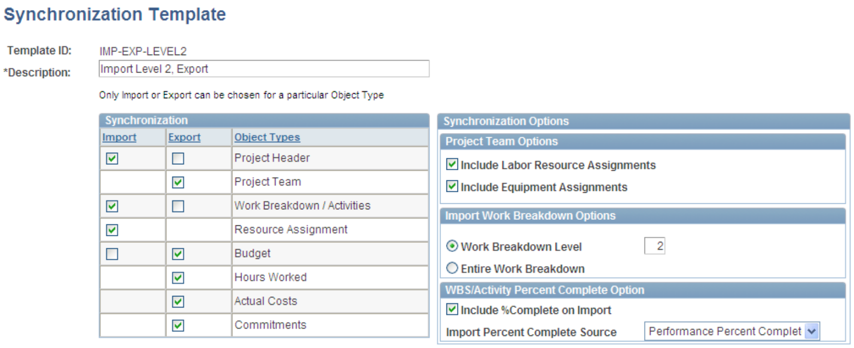
- Consistent project planning techniques and methodologies drive better operating results
- Up-to-date, accurate information available in both PeopleSoft and Primavera P6 improves project governance and decision-making
- Enterprise-wide program visibility reduces project portfolio risk
- Packaged integration reduces IT costs and accelerates time to value

PeopleSoft Program Management adds the ability to share data between PeopleSoft and Primavera P6 to simplify and lower the cost of achieving enterprise project portfolio visibility and control. Integrating Primavera P6 with PeopleSoft Projects (known as Enterprise Service Automation or "ESA") enables organizations to combine the planning, resource scheduling, and project progressing strengths of Primavera P6 with the project sourcing, resource budgeting and planning, and financial controlling capabilities of PeopleSoft Projects to manage the full project portfolio lifecycle. The integration aims to align enterprise master data and financials with project operations to improve transparency, increase business process flexibility, and decrease the cost of administering projects.

Establish Consistent Project Planning Techniques and Methodologies to Drive Better Operating Results

Consistent project planning techniques and adherence to defined methodologies provide structure to the project lifecycle and ensure that business strategies are supported and results are achieved.

The PeopleSoft Projects integration with Primavera P6 provides securely managed templates and schedulable data integration to facilitate governance and discipline throughout the project lifecycle. By synchronizing your master resource data from PeopleSoft to Primavera P6, your organization can ensure the project managers planning and scheduling with Primavera P6 work with the same resources sourced and financially authorized for use on the projects by procurement staff, resource managers, equipment managers, and project financial analysts working in the PeopleSoft applications.



Synchronization Template

Template ID: IMP-EXP-LEVEL2
*Description: Import Level 2, Export

Only Import or Export can be chosen for a particular Object Type

Synchronization

Import	Export	Object Types
☑	☐	Project Header
	☑	Project Team
☑	☐	Work Breakdown / Activities
☑		Resource Assignment
☐	☑	Budget
	☑	Hours Worked
	☑	Actual Costs
	☑	Commitments

Synchronization Options

Project Team Options

☑ Include Labor Resource Assignments
☑ Include Equipment Assignments

Import Work Breakdown Options

● Work Breakdown Level 2
○ Entire Work Breakdown

WBS/Activity Percent Complete Option

☑ Include %Complete on Import
Import Percent Complete Source: Performance Percent Complet

Figure 1. The graphic above showcases the use of a project's Synchronization Template to select the direction of data flow for each business data object. Users can also select the level of Work Breakdown Structure that data will roll up to when imported from Primavera P6 into PeopleSoft.

Templated data flows enable organizations to embed successful techniques into their project management discipline. With this integration between PeopleSoft and Primavera P6, your organization can rely on the software to institutionalize best practices proven to work.

Up-to-Date, Accurate Information Improves Project Governance and Decision-Making

Entering data in one place and having it reliably synchronized between PeopleSoft and Primavera P6 enables organizations to plan consistently with readily accessible, up-to-date information. The resulting accurate data can be relied upon to plan and forecast resource usage and expenditures.

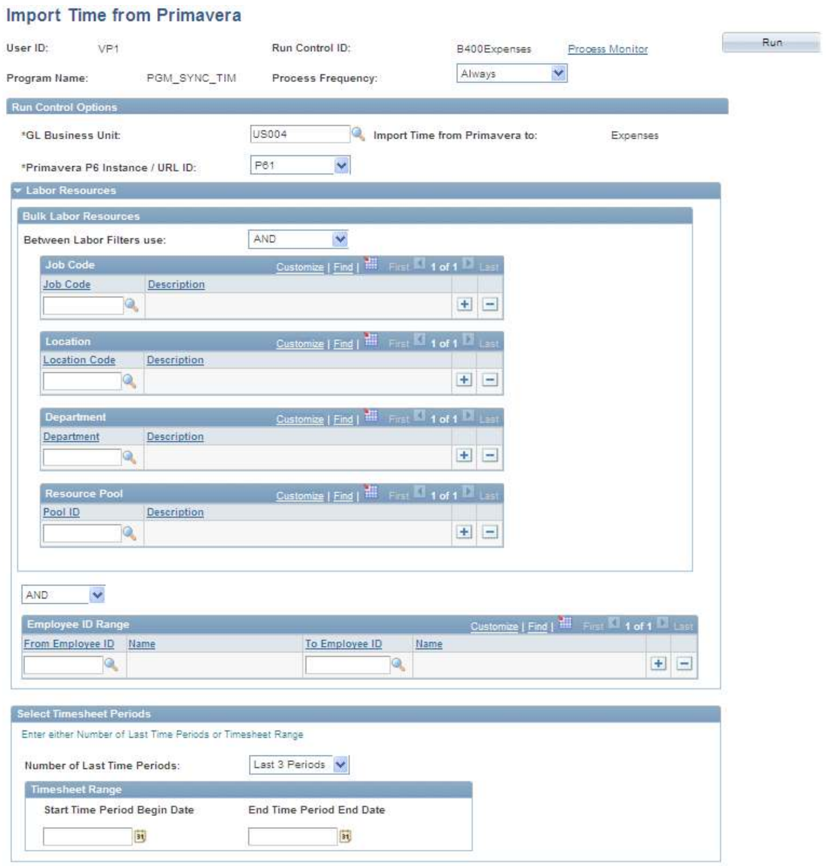
By sharing synchronization templates among projects, you can be assured that the organization’s enterprise project data flows are governable and enforce business behaviors that drive predictability. The templates adapt to easily support the changing needs of each phase of a project and the data flows associated with various project management methodologies.

Further, with percent complete progress information coming in from “the field”, you can drive billing, capitalization, and other financial events as soon as activities cross specific thresholds. Increased flexibility is offered via options to select the percent complete value for import from Primavera P6 into PeopleSoft - Duration Percent Complete, Performance Percent Complete, or Unit Percent Complete. Rapid and accurate identification of milestone completion enables organizations to improve billing accuracy, cash flow, and the quality of financial accounting.

Enterprise-Wide Program Visibility Reduces Project Portfolio Risk

Visibility into the status of a program is an imperative. This includes oversight of costs and commitments, project progress, and resource deployment.

With PeopleSoft budget, actual costs, actual hours worked and commitments available in Primavera P6, you decrease the risk of budget blow-outs and other overspending excuses. The Project Management Office (PMO) is able to see what is being spent and intervene if necessary. In addition, timesheets are able to be imported from Primavera P6 into PeopleSoft Project Costing or PeopleSoft Expenses, allowing the PMO to monitor and identify projects with excessive or inaccurate hours.



Import Time from Primavera

User ID: VP1

Run Control ID: B400Expenses

Program Name: PGM_SYNC_TIM

Process Frequency: Always

Run Control Options

*GL Business Unit: US004

Import Time from Primavera to: Expenses

*Primavera P6 Instance / URL ID: P61

Labor Resources

Bulk Labor Resources

Between Labor Filters use: AND

Job Code

Job Code	Description

Location

Location Code	Description

Department

Department	Description

Resource Pool

Pool ID	Description

AND

Employee ID Range

From Employee ID	Name	To Employee ID	Name

Select Timesheet Periods

Enter either Number of Last Time Periods or Timesheet Range

Number of Last Time Periods: Last 3 Periods

Timesheet Range

Start Time Period Begin Date	End Time Period End Date

Figure 2. By integrating timesheets from Primavera P6 to either PeopleSoft Project Costing or PeopleSoft Expenses time entry, you can minimize duplicate keying of data and the risk of inaccuracies. Primavera P6 timesheet data can also flow into PeopleSoft Time & Labor via the existing integration between PeopleSoft Expenses time entry and PeopleSoft Time & Labor.

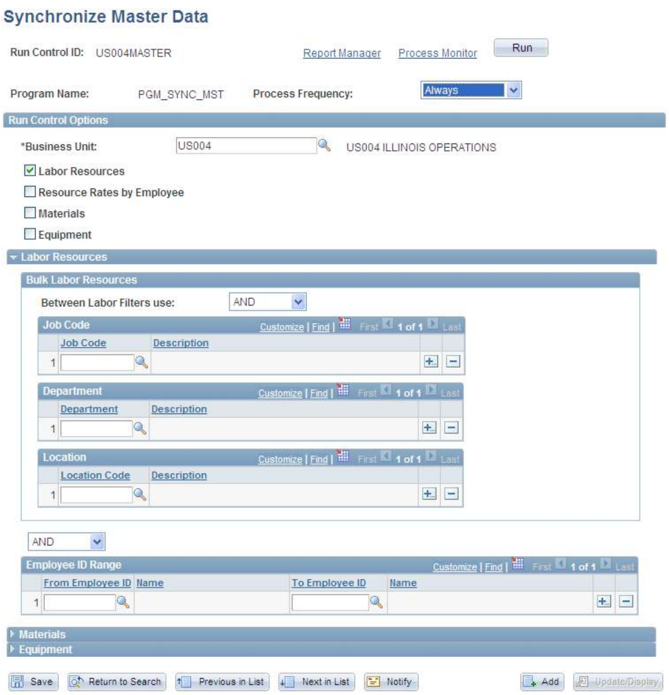
From across the project portfolio, early warnings can alert users of any potential physical progress or financial problems. Delays in project progress are available in PeopleSoft from the field without the need to rely on individuals forwarding information to the PMO. Early problem detection and rectification results in a greater likelihood of project success.

Also, standards put in place through the use of templates and governable business processes increase the transparency of project data in both PeopleSoft and Primavera P6 and thereby allow the PMO to more effectively streamline and adjust project practices as needed.

Packaged Integration Reduces IT Costs and Accelerates Time to Value

Fully developed and supported by Oracle, this integration between PeopleSoft Program Management and Primavera P6 is easily configured and requires no additional middleware technology. It utilizes PeopleSoft Integration Broker—a standard component of PeopleSoft PeopleTools—to communicate between PeopleSoft and Primavera P6's web services.

Engineered with IT, capital infrastructure, and professional services project use cases in mind, the flexible data transfer capabilities allow you to easily configure the integration to fulfill your business process requirements. Checkbox options on the synchronization templates allow business analysts to specify the behavior of the data flows and remove the need to code new software when business processes change.



Synchronize Master Data

Run Control ID: US004MASTER

Program Name: PGM_SYNC_MST

Process Frequency: Always

Run Control Options

*Business Unit: US004 US004 ILLINOIS OPERATIONS

☑ Labor Resources

☐ Resource Rates by Employee

☐ Materials

☐ Equipment

Labor Resources

Bulk Labor Resources

Between Labor Filters use: AND

Job Code

	Job Code	Description
1		

Department

	Department	Description
1		

Location

	Location Code	Description
1		

AND

Employee ID Range

	From Employee ID	Name	To Employee ID	Name
1				

Figure 3. This image illustrates the master resource data available to send to Primavera P6 and the extensive selection of filters available to control which data sets are sent.

Oracle’s PeopleSoft Projects (ESA) Solutions

Oracle’s PeopleSoft Projects (ESA) suite is an integrated family of project management applications. These products provide a complete solution to help you invest in the right portfolio of projects, standardize project financial process, and optimize project resource utilization.

Contact Us

For more information about PeopleSoft Projects and the Primavera P6 integration, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.

Oracle is committed to developing practices and products that help protect the environment

Copyright © 2013, Oracle and/or its affiliates. All rights reserved.

This document is provided for information purposes only and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. UNIX is a registered trademark licensed through X/Open Company, Ltd. 1010

Hardware and Software, Engineered to Work Together