

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

PROCESS GROUP: INITIATION

Develop Project Charter

Knowledge Area: **Integration**

4.1

PeopleSoft Project Management Functions

The project charter serves as the input document for the initial go-no-go selection process. Those projects that pass this decision phase qualify for inclusion in the Portfolio Management selection process. PeopleSoft ESA offers users the ability to develop a project charter via pre-defined templates. In cases where project specific details are required, pre-delivered forms may be attached as well. Each project can also be assigned to an overall portfolio of projects in order to evaluate and select only those projects that meet key quantitative and qualitative criteria for further evaluation, approval, and funding.

Corresponding PeopleSoft Modules

Program Management
Project Portfolio Management
Project Costing

Develop Preliminary Project Scope Statement

Knowledge Area: **Integration**

4.2

PeopleSoft Project Management Functions

The scope statement represents the first description of the project and its objectives. A project's scope can be defined using a free-form text description, through a document attachment, via selection of project classification values or any combination of these.

Corresponding PeopleSoft Modules

Program Management
Project Portfolio Management

PROCESS GROUP: PLANNING

Develop Project Management Plan

Knowledge Area: **Integration**

4.3

PeopleSoft Project Management Functions

The Project Management plan often is based upon the Project Charter. The results generated from each knowledge area after section 4.3 within the planning stage ultimately makes up the Project Management Plan. PeopleSoft ESA has functionality to store organizations' process assets (e.g., templates, checklists, completed document). For Project Management Plan development, this includes templates and plans completed on past projects, the use of which can make planning of future projects quicker and more efficient.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Scope Planning

Knowledge Area: **Scope**

5.1

PeopleSoft Project Management Functions

A Scope Management Plan is an important tool for keeping projects on track. It represents the method the organization will employ to manage project scope. The process includes the change control process. PeopleSoft's robust workflow capabilities enable users to create workflows and triggers necessary to manage the project's scope, including obtaining the appropriate approvals and signoffs.

Corresponding PeopleSoft Modules

Program Management
Project Costing

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Scope Definition

Knowledge Area: **Scope**

5.2

PeopleSoft Project Management Functions

Defining the detailed project scope is critical to keeping projects on track. It is performed by the Project Manager and team. PeopleSoft ESA provides templates for Scope Definition, with a Help/Tutorial function available. PeopleSoft's repository can provide an archive of Scope Definitions from organizations' past projects. These may be used as the foundation for creating scope definitions for new or similar projects. As well, best practices, from a staffing perspective, work management perspective, or project scheduling perspective can selectively be copied from current active or other completed projects.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Create Work Breakdown Structure

Knowledge Area: **Scope**

5.3

PeopleSoft Project Management Functions

Project Manager and team create a work breakdown structure (WBS) for their new project. The WBS can be created from scratch, copied entirely from another project or pieces of existing WBSs can be selectively copied to create a new WBS for the project. Using a library of existing workplans enables users to leverage past experience as a means to enable future success.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Activity Definition

Knowledge Area: **Time**

6.1

PeopleSoft Project Management Functions

PeopleSoft ESA supports multiple versions of a project WBS. A Project Manager can enter a preliminary WBS, then add detail to it as they define project activities. There is no limit to the number of activities that can be input and tracked.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Activity Sequencing

Knowledge Area: **Time**

6.2

PeopleSoft Project Management Functions

Standard activity sequences can be defined in PeopleSoft ESA and applied to all projects. Or, project-specific activity sequences can be defined. PeopleSoft ESA provides export and import functionality with other scheduling tools. The schedules can be imported back into PeopleSoft ESA, where financial data can be added automatically for project execution, monitoring, and control.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Activity Resource Estimating

Knowledge Area: **Time**

6.3

PeopleSoft Project Management Functions

PeopleSoft ESA facilitates Activity Resource Estimating by allowing roles, materials and other equipment to be assigned at the project and task levels. With PeopleSoft ESA, the resource plan is tightly integrated with the work breakdown structure to capture all resource requirements and project related costs.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Activity Duration Estimating

Knowledge Area: **Time**

6.4

PeopleSoft Project Management Functions

PeopleSoft ESA provides the ability to define effort, quantities, resources and duration at the task level. As project actuals are applied to the project, PeopleSoft will derive new Estimates to Complete which can be used as a guide for adjustments to activity duration. Since PeopleSoft ESA provides for the creation of multiple WBS versions, users can also compare multiple workplan versions on past projects to assess actual time needed for repetitive types of deliveries.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Schedule Development

Knowledge Area: **Time**

6.5

PeopleSoft Project Management Functions

Schedule Development is a team activity. PeopleSoft ESA's versioning capability allows multiple versions of a project schedule to be stored until the best schedule for the project is determined, baselined, and approved. PeopleSoft workflow capability facilitates the automatic routing of the schedule to appropriate project stakeholders for review, approval, and signoff.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management

Cost Estimating

Knowledge Area: **Cost**

7.1

PeopleSoft Project Management Functions

PeopleSoft ESA provides very flexible estimating capability. Effort and duration can be estimated with or without resource assignments. Standard burden rates can be set so they will be applied automatically to all project estimates, if desired. Burden rates can appear separately from labor costs on invoices generated by PeopleSoft, which is a requirement of public sector invoices in many situations.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management

Cost Budgeting

Knowledge Area: **Cost**

7.2

PeopleSoft Project Management Functions

Unlike other Project Management tools, PeopleSoft ESA automatically populates project workplan cost estimates into the budget, thus reducing manual activity and human error. Organizations have the option of fully or partially sharing the WBS between the workplan and budgets. PeopleSoft supports various views of project budgets.

Corresponding PeopleSoft Modules

Program Management
Project Portfolio Management
Project Costing
Planning & Budgeting

Quality Planning

Knowledge Area: **Quality**

8.1

PeopleSoft Project Management Functions

PeopleSoft provides functionality for determining which project types require Quality Management Plans. If a plan is needed, PeopleSoft provides the capability to define and activate a review process, including approvals and signoffs. An archive of Quality Management Plans from organizations' past projects is available, which may be used as the foundation for new, similar projects.

Corresponding PeopleSoft Module

Program Management

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Human Resource Planning

Knowledge Area: **Human Resources**

9.1

PeopleSoft Project Management Functions

The staffing management plan indicates which skill sets and people are needed to deliver a project. PeopleSoft ESA offers several ways to complete a Staffing Management Plan (resource plan). Resource planning can be done at the project and task levels using the assignment of people, roles, equipment and/or material items to projects. Or, resource planning can be done at the project level, providing for the definition of resources needed without defining a potential set of project tasks and activities. Templates and past projects can provide an archive of Staffing Management Plans, which may be used as the foundation for new, similar projects.

Corresponding PeopleSoft Modules

Program Management
Resource Management

Communications Planning

Knowledge Area: **Communications**

10.1

PeopleSoft Project Management Functions

Project communication is an important factor for project success. Poor communication on projects is a common source of project failure. PeopleSoft ESA provides rich functionality to support efficient communication by enabling Project Managers to identify project stakeholders, define their role(s) on the project, indicate whose signature is required on plans and deliverables and to attach this information to a project, task or deliverable. Project-based information is presented either online or via workflow-driven status reports; role-based controls determine what information is provided to stakeholders.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management

Risk Management Planning

Knowledge Area: **Risk**

11.1

PeopleSoft Project Management Functions

PeopleSoft ESA facilitates Risk Management Planning with templates and standard plans for typical projects. PeopleSoft ESA can store Risk Management Plans against their related project. The Deliverables functionality can be used to define workflow, stakeholder involvement in the plan, and required approvals and signoffs.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management

Risk Identification

Knowledge Area: **Risk**

11.2

PeopleSoft Project Management Functions

OMB requires that at least one risk be identified in each of its 20+ risk categories. PeopleSoft ESA can facilitate Risk Identification by attaching lists of identified risks to specific projects or tasks. PeopleSoft ESA can also store risk identification templates and/or lists of typical project risks, that can expedite risk identification on specific projects.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Qualitative/Quantitative Risk Analysis

Knowledge Area: **Risk**

11.3/11.4

PeopleSoft Project Management Functions

OMB requires that identified risks be analyzed. PeopleSoft ESA can facilitate Risk Analysis with templates and pre-defined checklists. Standard probabilities and impacts can be stated on templates and checklists for organizations with many repetitive projects, where the risks are the same or similar from project to project. PeopleSoft ESA allows risk for each project to be scored during portfolio analysis.

Corresponding PeopleSoft Modules

Program Management
Project Portfolio Management
Project Costing

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Risk Response Planning

Knowledge Area: **Risk**

11.5

PeopleSoft Project Management Functions

OMB requires that responses be developed for priority risks. Risk Response Plans can be attached to specific projects in PeopleSoft ESA, and specific response actions can be added and tracked in the WBS as Deliverables, with workflows assigned.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Plan Purchases and Acquisitions

Knowledge Area: **Procurement**

12.1

PeopleSoft Project Management Functions

PeopleSoft's integrated functionality simplifies issuing and tracking purchase requisitions. Purchases can include contract labor, materials and equipment. As soon as purchase reqs are entered into PeopleSoft, a purchasing requisition is created, and they are visible within project budgets, giving Project Managers instant visibility into how their budgets are impacted. PeopleSoft also allows Project Managers to track contractor utilization.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management
Services Procurement
Purchasing

Plan Contracting

Knowledge Area: **Procurement**

12.2

PeopleSoft Project Management Functions

Purchasing requisitions generated by a project manager are automatically routed to the Purchasing Manager or buyer for determination of vendor and item/style. PeopleSoft's procurement capabilities include the ability for requests to be sent to multiple organizations, to assess availability and obtain the best possible pricing while at the same time fulfilling the project requirement in a timely manner.

Corresponding PeopleSoft Modules

Project Costing
Services Procurement
Purchasing

Direct and Manage Project Execution

Knowledge Area: **Integration**

4.4

PeopleSoft Project Management Functions

PeopleSoft ESA provides full functionality for managing and tracking Workplans. The actual tasks are accessed by each team member and progress is reported via a team member home page. Time keeping can be done at the task level, and tasks can be weighted differently for progress calculations (Earned Value). Workflows can be associated with each task.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Enterprise Portal
Time & Labor
Expenses

PROCESS GROUP: **EXECUTING**

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Perform Quality Assurance

Knowledge Area: **Quality**

8.2

PeopleSoft Project Management Functions

PeopleSoft ESA provides tracking functionality for Quality Assurance tasks included in the WBS. PeopleSoft's performance management allows deliverables to be tracked via indicators.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Acquire Project Team

Knowledge Area: **Human Resources**

9.2

PeopleSoft Project Management Functions

PeopleSoft ESA provides full functionality for selecting and assigning team members and contract labor to projects. PeopleSoft records competencies and other resource-related data items like clearance levels. Open positions can be advertised automatically to predefined groups, and PeopleSoft supports both soft and hard booking. Search engines produce a list of who is available and meets position requirements (with scorecards). As resources are assigned, PeopleSoft alerts the Project Manager to resource conflicts. Resource Managers have the ability to get an overview of where all of their resources are assigned and can view resource loading.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management

Develop Project Team

Knowledge Area: **Human Resources**

9.3

PeopleSoft Project Management Functions

PeopleSoft's functionality facilitates and enhances teaming and sharing of information. Competency profiles can be created for each resource, which provides both a skill library and a Learning Management function that allows Resource Managers to assign courses to resources.

Corresponding PeopleSoft Modules

Resource Management
Enterprise Portal

Information Distribution

Knowledge Area: **Communications**

10.2

PeopleSoft Project Management Functions

PeopleSoft ESA will distribute information to project stakeholders based on workflows set up during Communication Planning. Team members are notified of and can access updated project information at anytime.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Resource Management
Enterprise Portal

Request Seller Responses

Knowledge Area: **Procurement**

12.3

PeopleSoft Project Management Functions

In organizations where Project Managers have a role in reviewing seller responses and selecting sellers, PeopleSoft Supplier Relationship Management (SRM) can be used to capture seller responses and trigger purchase requests.

Corresponding PeopleSoft Modules

Services Procurement
Purchasing

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Select Sellers

Knowledge Area: Procurement

12.4

PeopleSoft Project Management Functions

In organizations where Project Managers have a role in reviewing seller responses and selecting sellers, PeopleSoft Supplier Relationship Management (SRM) can be used to capture seller responses and trigger purchase requests.

Corresponding PeopleSoft Modules

Services Procurement
Purchasing

Monitor and Control Project Work

Knowledge Area: Integration

4.5

PeopleSoft Project Management Functions

PeopleSoft ESA provides organizations with the ability to create a project baseline to evaluate overall project performance and take corrective action when necessary. PeopleSoft supports multiple progress calculations. To gauge the impact of project changes, multiple versions of the workplan may be generated without any impact to the project baseline.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Integrated Change Control

Knowledge Area: Integration

4.6

PeopleSoft Project Management Functions

Organizations can include the financial impact of a change request to the budget and, if accepted, automatically update the budget. This action will not alter the actual project baseline. A complete audit history of each change is maintained and workflow is provided for change order approval.

Corresponding PeopleSoft Modules

Program Management
Project Costing
Enterprise Portal

Scope Verification

Knowledge Area: Scope

5.4

PeopleSoft Project Management Functions

PeopleSoft workflow includes functionality to have issues and change orders approved. Other means of communicating to the customer or key project stakeholders includes status reports which can be configured to show specific information. Access to specific reports may be granted. The information can be exported to a Word Document or Excel spreadsheet. Customers can also log into the system to provide electronic signoffs.

Corresponding PeopleSoft Modules

Program Management
Project Costing

PROCESS GROUP: MONITORING & CONTROLLING

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Scope Control

Knowledge Area: **Scope**

5.5

PeopleSoft Project Management Functions

Organizations can include the financial impact of a scope change request to the budget and, if accepted, automatically update the budget. This action will not alter the actual project baseline. A complete audit history of each change is maintained and workflow is provided for change order approval.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Schedule Control

Knowledge Area: **Time**

6.6

PeopleSoft Project Management Functions

Organizations can update the workplan to reflect the latest project schedule. This action will not alter the actual project baseline. A complete audit history is maintained for each user participating in the change management, as well as an audit history of the change request from initiation to closure. Workflow is provided for change order review and approval.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Cost Control

Knowledge Area: **Cost**

7.3

PeopleSoft Project Management Functions

Project costs are identified via key performance indicators and numeric scoring. Stoplight indicators are displayed on screen or in other graphical formats. Financial information can be embedded into key performance indicators to allow users to drill into the actual cost issue within the application. PeopleSoft ESA supports Earned Value Management (EVM) as well as forecast generation.

Corresponding PeopleSoft Module

Program Management
Project Costing

Perform Quality Control

Knowledge Area: **Quality**

8.3

PeopleSoft Project Management Functions

Overall project quality is managed through a combination of pre-defined or user-defined project metrics. Each project is assigned project metrics which are tracked in real-time and are viewable via status reports either online or in hardcopy. Thresholds for acceptable performance are user defined as well.

Corresponding PeopleSoft Modules

Program Management
Project Costing

Manage Project Team

Knowledge Area: **Human Resources**

9.4

PeopleSoft Project Management Functions

Performance-based appraisals for each project team member can be conducted and stored. Training plans can be assigned to resources by management or resources can seek out training available through PeopleSoft's Enterprise Learning Management solution.

Corresponding PeopleSoft Modules

Resource Management
Enterprise Learning Management

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

Performance Reporting

Knowledge Area: **Communications**

10.3

PeopleSoft Project Management Functions

PeopleSoft ESA will perform performance reporting to project stakeholders based on workflows set up during communication planning.

Corresponding PeopleSoft Modules

Program Management
Project Portfolio Management

Manage Stakeholders

Knowledge Area: **Communications**

10.4

PeopleSoft Project Management Functions

PeopleSoft ESA provides for separate definition of Project Stakeholders versus the project delivery team. These members of the team can be informed, via workflow or exception notifications, of the status and overall performance the project delivery.

Corresponding PeopleSoft Modules

Program Management
Project Portfolio Management

Risk Monitoring and Control

Knowledge Area: **Communications**

11.6

PeopleSoft Project Management Functions

During implementation, a project risk status report can be configured and used as part of the Communication Plan. Risks are monitored as part of managing the overall project. Everyone on a project can be provided with ability to log an issue or change request and route for approval or rejection.

Corresponding PeopleSoft Module

Program Management
Project Portfolio Management
Project Costing

Contract Administration

Knowledge Area: **Quality**

12.5

PeopleSoft Project Management Functions

Contract creation is supported by robust authoring of all types of contract documents. Workflow-based contract administration is offered, including status control, hold and change management. Other areas of functionality include deliverable tracking and contract cost, billing and revenue recognition.

Corresponding PeopleSoft Module

Contracts

PeopleSoft Enterprise Service Automation (Projects)

PMBOK Oracle Mapping

PROCESS GROUP: CLOSING

Close Project

Knowledge Area: **Integration**

4.7

PeopleSoft Project Management Functions

The end of a project can be setup as a project phase in the work breakdown structure. The results are communicated to key stakeholders via project status reporting. Once complete, a project can be closed in PeopleSoft, which prevents transactions from charging against a project after closure.

Corresponding PeopleSoft Module

Project Costing

Contract Closure

Knowledge Area: **Procurement**

12.6

PeopleSoft Project Management Functions

PeopleSoft ESA manages closure of a project or program and manages the final details of payment and milestone completion. Project performance reporting assists with progress completion identification.

Corresponding PeopleSoft Modules

Program Management
Project Portfolio Management
Project Costing
Contracts