

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			Synchronization Options	
Import	Export	Object Types	Project Team Options	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Project Header	<input checked="" type="checkbox"/> Include Labor Resource Assignments	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project Team	<input checked="" type="checkbox"/> Include Equipment Assignments	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Work Breakdown / Activities	Import Work Breakdown Options	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Resource Assignment	<input checked="" type="radio"/> Work Breakdown Level <input type="text" value="2"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Budget	<input type="radio"/> Entire Work Breakdown	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Hours Worked	WBS/Activity Percent Complete Option	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Actual Costs	<input checked="" type="checkbox"/> Include %Complete on Import	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Commitments	<input type="checkbox"/> Import Percent Complete Source <input type="text" value="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 Process Monitor

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	Description
<input type="text"/>	<input type="text"/>

Location	Description
<input type="text"/>	<input type="text"/>

Department	Description
<input type="text"/>	<input type="text"/>

Resource Pool	Description
<input type="text"/>	<input type="text"/>

AND

Employee ID Range	Name	To Employee ID	Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Select Timesheet Periods

Enter either Number of Last Time Periods or Timesheet Range

Number of Last Time Periods: Last 3 Periods

Start Time Period Begin Date	End Time Period End Date
<input type="text"/>	<input type="text"/>

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 [Report Manager](#) [Process Monitor](#) [Run](#)

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	Description
1	

Department	Description
1	

Location Code	Description
1	

AND

From Employee ID	Name	To Employee ID	Name
1			

Materials
Equipment

Save Return to Search Previous in List Next in List Notify Add Update/Display

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.

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Hardware and Software, Engineered to Work Together