

Oracle

**Primavera P6 EPPM**

**PeopleSoft Program Management User Guide for On-Premises**

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Oracle Primavera P6 EPPM PeopleSoft Program Management User Guide for On-Premises

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# About This Guide

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## Scope

Integrating P6 with PeopleSoft Program Management (known as Enterprise Service Automation or ESA) enables you to combine P6's management and scheduling power for projects, portfolios, and resources with the power of PeopleSoft Program Management to ensure accurate forecasting of costs, resources, and schedules. This guide describes how to integrate PeopleSoft Program Management with your P6 installation.

This guide describes the functionality of the Classic Views of P6. For instructions on using the Standard Views of P6, see *P6 Help*.

## Audience

Users who are responsible for creating and managing projects in P6 which will be integrated with PeopleSoft Program Management should use this guide.

## Using This Guide

This guide assumes P6 and its supporting applications are installed.

Within our documentation, some content might be specific for cloud deployments while other content is relevant for on-premises deployments. Any content that applies to only one of these deployments is labeled accordingly.

# About Personal Information

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Personal information (PI) is any piece of data which can be used on its own or with other information to identify, contact or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details, for example a person's IP address, phone IMEI number, gender, and location at a particular time could all be personal information. Organizations are responsible for ensuring the privacy of PI wherever it is stored, including in back-ups, locally stored downloads, and data stored in development environments.

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**Caution** Personal information (PI) may be at risk of exposure. Depending on local data protection laws organizations may be responsible for mitigating any risk of exposure.

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## Managing Projects and Activities in P6

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### Viewing and Creating Projects in P6




#### Viewing/Opening Projects

Use the **EPS** page to view and manage the Enterprise Project Structure (EPS) and its projects.

To navigate to the EPS page to view or open projects:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **EPS**.

To create Projects:


- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page, expand the  **EPS** element where you want to add the new project.
- 4) Within the  **EPS** element, click  **Row Actions** and select **Add Project**.
- 5) In the **Add Project** dialog box, click the **General** tab.

### Creating WBSs


#### Creating a WBS

Create a work breakdown structure to divide a project into levels. You can create sibling WBSs to represent WBSs that are hierarchically equal, or child WBSs to represent WBSs that are subordinate to projects or other WBSs.

To create a WBS:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
  - a. Select a WBS or project. The WBS can act as a sibling or a parent. The project will act as a parent.
  - b. Click the  **Row Actions** menu:
    - To add a sibling, select **Add Sibling WBS**.
    - To add a child, select **Add Child WBS**.
  - c. Enter a name in the **Name** field of the new WBS.
  - d. Click **Save**.


Tip

- ▶ To add, edit, or delete WBS elements, whether you are working with a single project or a group of projects, you must be working in an activity view that is organized based on all levels of the WBS hierarchy. To organize your view to show all levels of the WBS hierarchy, click  **Customize View** then click the **Grouping** tab, in the **Group By** list select WBS and then select the **All** option under Grouping Interval.
- ▶ The WBS will automatically be assigned a name based upon the project or WBS you select. For example, if the project or WBS is named *WBS: Business Project 1.5*, the application will automatically name the new *WBS: Business Project 1.6*.
- ▶ You can also right-click a WBS or project and select **Add Sibling WBS** or **Add Child WBS** to create a WBS.

## Creating Activities

Create activities to define a more detailed breakdown of projects or WBSs.

To create activities:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
  - a. Select a project, WBS, or activity; the new activity will be added beneath your selection.
  - b. Click the  **Row Actions** and select **Add Activity**.
  - c. Enter a name in the **Name** field.
  - d. Click **Save**.

### Tip

You can also right-click a project, WBS, or activity and select **Add Activity** to.

## Summarizing P6 Projects

Use the following procedure in P6 EPPM to summarize any projects that you will be integrating with PeopleSoft:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
  - a. Select a project or EPS node.
  - b. Click the **Actions** ▾ menu and select **Summarize Projects**.

### Tip


You can also summarize projects from the **Actions** menu of the **Activities** page. When you summarize projects from the **Activities** page, the application will summarize all of the currently open projects. When you summarize from the **EPS** page, only the selected projects will be summarized.

## Managing Resources

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### Searching for a Specific Resource

To search for administrative information about a specific resource:

- 1) Click **Resources**.
- 2) On the **Resources** navigation bar, click **Administration**.
- 3) On the **Resources** tab, click  **Search** and begin typing.  
The view will be filtered to resources which match your search text as you type.
- 4) Click on the **General**, **Roles**, **Resource Teams**, **Codes**, **Units and Prices**, or **Settings** detail windows to view information relating to the resource.

### Viewing Resource Rates


You can use the **Units and Prices Detail** tab to access individual resource rate information.

### Viewing Resource Types

You can use the **Resource Type** column to view individual resource type information.

### Searching for Activities Related to a Specific Resource

To search for a specific resource and display activity information related to the resource.

- 1) Click **Resources**.
- 2) On the **Resources** navigation bar, click **Assignments**.
- 3) To customize the list of resources displayed in the table, click  **Filters**, select **Manage Filters** and choose to use an existing filter, or create a new filter.

#### Tip

By using a filter to match a specific resource, you can display the activities related to that resource.

### Assigning Resources to Unstaffed Activities

Use this procedure to assign resources to activities to fulfill staffing requests. Resources include the personnel and equipment that perform work on activities across all projects. Resources are generally reused between activities and/or projects.

- 1) Click **Resources**.
- 2) On the **Resources** navigation bar, click **Analysis**.
- 3) On the **Analysis** page, click the **Role** tab.
- 4) On the **Role** tab:
  - a. Click the **Group By** list and select **Role Hierarchy**, and then select a role.



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**Note** If costs, rather than units, are displayed, select Units in the **Display** list.

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- b. Click the name of the project that has unstaffed units to display the project's unstaffed activities.
- 5) On the **Role activities for Project** dialog box, select the check box next to each unstaffed activity you want to staff with the same resource and click **Assign Resource....** Activities that have specific resource requirements associated with them display **Yes** in the **Search Criteria** column.
- 6) In the **Assign Resource** dialog box, select a resource. To review resource allocation before assigning a resource, click **Show Usage**. This displays the selected resource's assignments based on summarized data. If you want to assign the selected resource to the activity, click **Select**.
- 7) Close the **Role activities for Project** dialog box.

**Tip**

- ▶ Resource usage data is based on summary data. Any changes made to assignments within a project will not be reflected until the project is summarized.
- ▶ A Global preference setting lets you choose to automatically summarize the project after assigning resources, so that summary data always reflects current resource usage. To choose this option, click the **Administer** menu and select **My Preferences**, then click the **Global** tab if not already displayed. In the **Resources** section, select **Automatically summarize project after assigning resources**. Click **Save**.
- ▶ The list of resources you can select from is determined by your resource security privileges and individual resource's current project association.

## Assigning Resources to Activities


Perform these steps to assign one or more resources to an activity.

To assign resources to an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the Activities page, select the activity to which you want to assign one or more resources and click the **Assignments** detail window.
- 4) In the Assignments detail window, click **Assign...** ▾ and select **Resource**.
- 5) In the Assign Resource dialog box:
  - a. Select the resources to assign and click **Assign**.

**Tip**

- ▶ When assigning resources to activities, the list of available resources includes only the resources that belong to your access node, based on resource access, and resources who are currently assigned to the project.

- ▶ When you assign a resource to an activity that does not have any resource assignments, the resource is identified as the primary resource. If you subsequently assign more resources to the same activity, you can change the primary resource assignment for the activity by selecting the Primary Resource option for one of the resources in the Assignments detail window. If the Primary Resource option is not displayed in the Assignments detail window, click  **Customize View**, expand **General** and click **Primary Resource**.
- ▶ You can filter resources by open projects. Filtering resources by open projects shows only the resources currently assigned to the project that is currently open.

## Viewing UDF Fields

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To view WBS or Project UDFs.

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) In the Enterprise Data pane, expand **Projects**.
  - a. To view WBS UDFs, click **WBS UDFs**.
  - b. To view Project UDFs, click **Project UDFs**.

To view Activity UDFs.


- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) In the Enterprise Data pane, expand **Activities** and click **Activity UDFs**.

## Managing Budgets

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### Viewing Budgets

To view the budget:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click EPS.
- 3) On the EPS page, click  **Customize View**.
- 4) In the Manage Views dialog box:
  - a. Click the **Columns** tab.
  - b. Expand **Budget** in the Available Columns list and double-click **Original Budget**, **Proposed Budget** and **Current Budget** to add these columns to the **Selected Columns** list.
  - c. Click **Apply**.
- 5) Select a project or EPS element and then click the **Budget Log** detail window to view budget changes.

**Tip**

- ▶ Click the column headers to sort the data. You can add additional column headers to facilitate sorting the data. For example, you can add the Business Unit column header to facilitate sorting the data by Business Unit.

## Modifying an Existing Budget

To create a budget change request:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the EPS page, select an EPS or project and click the **Budget Log** detail window.

**Note** You can also create budget change requests for a project or WBS element from the Budget Log detail window of the Activities page.

- 4) In the Budget Log detail window:
  - a. Click **+ Add (Ins)** to add a budget log line item.
  - b. In the **Amount** field, enter a currency value.
  - c. In the **Responsible** field, enter the name of the responsible person or department.
  - d. In the **Status** list, select a status value for the proposed change.
- 5) On the **EPS** page, click **Save**.

**Tip**

- ▶ In general, you should contact the person listed in the Responsible field to determine if the request is *Approved* or *Not Approved*.
- ▶ Enter a reason for the proposed change in the Reason field. The program manager of the affected EPS node or the project manager of the affected project can append this field with a reason for approval or denial.

## Adding Budgets

To add a budget

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
  - a. Select an EPS element.
  - b. Click the **Budget Log** detail window.
- 4) In the Budget Log detail window:
  - a. In the **Original Budget** field, enter the original budget in units of currency.
  - b. Click **+ Add (Ins)** to add a budget log line item.

- c. In the **Amount** field, enter a currency value.
  - d. In the **Status** list, select a value. Select *Pending* to add the amount to the **Proposed Budget** total. Select *Approved* to add the amount to the **Current Budget**. Select *Not Approved* to keep only a record of the budget change line item.
- 5) On the EPS page, click **Save**.
  - 6) Repeat these steps with the following variations:
    - a. On the **EPS** page, repeat for each project or template within an EPS element.
    - b. On the **Projects** navigation bar, click **Activities**.
    - c. On the **Activities** page, repeat for each project, template, or WBS.

## Viewing the ERP Sync Status Field


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### Viewing the ERP Sync Status Field

The ERP Sync Status field is set during the synchronization process to one of the following values:

- ▶ New project
- ▶ Will not be integrated with ERP system
- ▶ Ready to be integrated to ERP system
- ▶ Already integrated with ERP system


To view the ERP Sync Status field:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click EPS.
- 3) On the EPS page, click  **Customize View**.
- 4) In the Manage Views dialog box:
  - a. Click the **Columns** tab.
  - b. Expand **Project Codes** in the **Available Columns** list and double-click **ERP Sync Status** to add it to the **Selected Columns** list.
  - c. Click **Apply**.

### Setting the ERP Sync Status field

When a project is ready to be imported from P6 to PeopleSoft Program Management for the first time, you need to manually set the ERP Sync Status field for the project to "*Ready to be integrated to ERP system*". The Synchronize Net-New Projects process, which is initiated in the PeopleSoft application, uses this field to determine which projects should be imported. When the Synchronize Net-New Projects process runs, it selects all P6 projects with an ERP Sync Status of "Ready to be integrated to ERP System" for importing into PeopleSoft Program Management. After the project(s) have been imported into PeopleSoft, the synchronization process updates the ERP Sync Status field to "Already integrated with ERP system" for all projects successfully imported. You should not update the ERP Sync Status field for these imported projects after the initial synchronization.

To set the ERP Sync Status field:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click EPS.
- 3) If the **ERP Sync Status** column is not visible, then perform the following step:
  - a. On the EPS page, click  **Customize View**.
  - b. In the Manage Views dialog box:
    1. Click **Columns**.
    2. Expand **Project Codes** in the **Available Columns** list and double-click **ERP Sync Status** to add it to the **Selected Columns** list.
    3. Click **Apply**.
- 4) Select a project.
- 5) In the **ERP Sync Status** field, enter **Ready to be integrated to ERP system** project code value.