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Making the Connection

Partners Consulting Helps San Diego Unified School District Integrate Primavera and PeopleSoft Systems

by Alison Weiss, November 2012

Members of the Project Controls Group at San Diego Unified School District (SDUSD) knew they were facing a challenge. The district had \$2.1 billion in bond money to improve technology, infrastructure, and buildings for approximately 200 local schools. The sheer volume of contracts and invoices was challenging to manage and pay with the number of staff that the district employed. To streamline and improve the processing of invoices, SDUSD's leadership decided to automate this process and integrate its [Oracle Primavera Enterprise Project Portfolio Management \(EPPM\)](#) system with its [Oracle PeopleSoft Financials](#) system.

To ensure the success of the integration, SDUSD's administrators sought the support of Partners Consulting, a long-time Oracle partner, well-known for their experience integrating ERP systems with Primavera. Based in Irvine, California, and employing 500 consultants, Partners Consulting provides a broad array of software consulting services. The Primavera Integration Group specializes in helping customers effectively connect Primavera with a number of systems, including Oracle PeopleSoft, Oracle E-Business Suite, and Oracle JD Edwards solutions.

Daniel Williams, PhD, the Primavera Practice Manager at Partners Consulting, says he has seen a growing demand for these kinds of integrations. "Often a company has people who are experts in one product such as Oracle JD Edwards and other people who are experts in Oracle Primavera, and these people can tend to silo up and have a perspective in only area," he observes. "But we strive to command an enterprise-level perspective so that we can deliver solutions that enhance the strengths of each system, and provide a solution that is focused toward our clients' business needs, not necessarily around the software."

The team at Partners Consulting created an easy-to-use, web-based application that connects Oracle PeopleSoft and Oracle Primavera Contract Manager. Now, when a SDUSD employee creates a purchase order or contract in Oracle PeopleSoft, the new application automatically replicates that item in Primavera, along with a template payment request. Then, the contractor can view the payment, update the completion percentages, and upload supporting documentation. Once submitted, the payment is routed and approved from within Oracle Primavera Contract Manager. After approval, the invoice is integrated back into PeopleSoft as a payment voucher.

The integration project started in November 2011 and went into production in the early spring of 2012, right on schedule, with more than 20 contractors using the new application. SDUSD administrators plan to bring more contractors on board, and have committed to further improvements. Next, Partners Consulting will automate the sending of committed contracts and budgets between systems, as well as actual costs.

Now, with less paperwork flowing back and forth during the invoice submission and approval process, contractors are being paid more quickly. "What used to take weeks to accept, receive, route, and mail out by hand, now takes just few days," says Dr. Williams. "This saves the school district time, stress, and money, and allows the Project Controls Group to focus on completing their projects."

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