

<b>Number:</b>	08.4.4	<b>Page:</b>	1 of 3
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<b>Revised By:</b>	Joshua Graves	<b>Review Cycle/Date:</b>	Annual
<b>Reviewed By:</b>	Fonda Logston	<b>Reviewing Unit:</b>	Enterprise Programs
<b>Title:</b>	Requesting PeopleSoft Project IDs SOP		
<b>Description:</b>	The process of requesting new PeopleSoft Project IDs for projects, products and services.		

## Requesting PeopleSoft Project IDs Standard Operating Procedure

1. General Statement of Purpose
  - 1.1. The purpose of this standard is to outline the steps taken when new PeopleSoft Project IDs are requested.
2. Scope
  - 2.1. This process applies to state employees requesting a Project ID. It also applies to the IT staff responsible for facilitating the requests.
3. Discipline
  - 3.1. Program Management
4. Terms and Definitions
  - 4.1. PeopleSoft Project ID – Identifies the Project, Service or Product within the PeopleSoft Financial and HCM products. These IDs are used for employees to post time against for labor tracking; POs are posted against project ID's for expense tracking.
  - 4.2. Product – An application that is supported by an agency.
  - 4.3. Service – Offered as part of the state CIO Service Catalog.
  - 4.4. Resource Category – Timesheet field used to classify how time was spent.
  - 4.5. Activity Code – Agency numbers, such as 090 for OMES, used for reporting time and labor, associated expenditures for agency purchases, projects, products and services.
  - 4.6. Cost Center – Service groups within OMES IS that contain project codes.
5. Instructions
  - 5.1. New PeopleSoft Project IDs can only be authorized by the Project Management Office (PMO).

<b>Number:</b>	08.4.4	<b>Page:</b>	2 of 3
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5.2. Requesting a new Project ID.

5.2.1. For a **Project**, the Project Manager will request a new Project ID when moving the project to Initiation within the PPM tool. In the Time and Labor section, there is a required question, “Is a time entry Project ID needed?” The Project Manager must select “Yes” for a Project ID to be created. They will also have to indicate the activity codes and cost center needed. The PMO will then open a CRM Case to request a new Project ID be created. This case will be assigned to the IS-Project Codes team.

5.2.2. For a **Product** or **Service**, the requestor will need to create a CRM Case to request the creation of a Project ID. The request will then be assigned to the IS-Project Management Office team for authorizing. The PMO will then create a CRM Case and have it assigned to the IS-Project Codes team. The IS-Project Codes team will then create the Project ID.

5.3. Requesting a change of the Project ID.

5.3.1. To request a change of the Project ID for **Projects, Products** or **Services**, the requestor will need to create a CRM Case. The request will then be assigned to the IS-Project Management Office for authorization. The IS-Project Codes team will then make the changes.

5.4. Requesting a deactivation of the Project ID.

5.4.1. To deactivate a Project ID for a **Project**, close the project using the PPM tool. Once the project is closed, the PMO will create a CRM Case requesting the Project ID be closed, which will be assigned to the IS-Project Codes team.

5.4.2. To deactivate a Project ID for a **Product** or **Service**, the requestor will need to create a CRM Case. The request will be assigned to the IS-Project Management Office team for authorization. The PMO will then create a CRM Case, which will go to the IS-Project Codes team.

<b>Number:</b>	08.4.4	<b>Page:</b>	3 of 3
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5.5. Requesting to create, change or deactivate a Resource Category.

5.5.1. To request a new Resource Category, or to change or deactivate one, the requestor will need to create a CRM Case. The request will then be assigned to the IS-Project Management Office team for authorization. The request will need to include the number of the Resource Category and the description of the addition, change or deactivation. With the PMO's authorization, the request will be sent to the IS-Project Codes team.

## 6. Roles and Responsibilities

- 6.1. Service Desk – Ensures that all service requests for Project IDs and Resource Categories are recorded and routed to the IS-Project Management Office team.
- 6.2. Project Management Office (PMO) – Authorizes Project ID and Resource Category changes, additions and deactivations.
- 6.3. IS-Project Codes team – With PMO's authorization, creates, changes and deactivates Project IDs and Resource Categories.