

PeopleSoft Enterprise Service  
Automation (ESA) Support for  
the Project Management Institute's  
Body of Knowledge

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# PeopleSoft Enterprise Service Automation (ESA) Support for the Project Management Institute's Body of Knowledge

Published by the Project Management Institute, the PMBOK Guide provides a set of standards that are almost universally regarded as “THE” standard for managing projects.

## EXECUTIVE OVERVIEW

PeopleSoft Enterprise Service Automation (ESA) both aligns and supports the Project Management Institute's Guide to the Project Management Body of Knowledge® (3rd Edition). In this paper, a synopsis of key Project Management (PM) terms and concepts is given, along with a detailed mapping of how PeopleSoft ESA supports each specific PM function.

## WHAT IS THE PROJECT MANAGEMENT BODY OF KNOWLEDGE?

The Project Management Body of Knowledge, often referred to as “The PMBOK” or PMBOK Guide®, “is the sum of knowledge within the profession of Project Management. [It] includes proven traditional practices that are widely applied, as well as innovative practices that are emerging in the profession ...” Published by the [Project Management Institute](#), the PMBOK Guide provides a set of standards that are almost universally regarded as the “THE” standard for managing projects.

The PMBOK Guide (3rd Edition) defines five process groups and nine knowledge areas, each containing activities to be applied in each phase of a project's life cycle.

## PROCESS GROUPS

The five process groups span the entire project lifecycle, and include:

### Initiating

Project Initiation is triggered by receipt of a work request from a customer. Examples of work requests are: new projects, new tasks within projects, and significant changes to existing project requirements or tasks. The work request is analyzed, and a high-level project plan, often called a “Project Charter”, is prepared as input to determining if the work should be undertaken. If the decision is yes, a Project Manager is authorized to proceed to Project Planning.

## **Planning**

The next phase is Planning, during which the work is planned in detail. A detailed project scope statement is prepared, and all work activities are identified in the project's Work Breakdown Structure (WBS). Resources are assigned, the schedule is developed, and project risk is considered. The output of Planning is a baselined Project Management Plan (also called a Workplan).

## **Executing**

During Project Execution, the work is carried out according to the Project Management Plan. The project's products are built and/or services are delivered, according to what is defined in the Project Scope Statement.

## **Monitoring and Controlling**

Project Monitoring and Control consists of measuring project performance against the baselined Project Management Plan. Variations from the plan are analyzed in relation to the project's budget, schedule, and scope. Corrective action is taken on any unacceptable variances. Change control is utilized to determine whether requested changes can be undertaken without impacting project success.

## **Closing**

To close projects in an orderly manner, specific contract and administrative activities are performed. This ensures that all provisions of the contract are met, lessons learned are prepared to benefit future projects, and project documentation is collected and stored together. Project Closeout also includes dispersing the project team to other assignments.

## **KNOWLEDGE AREAS**

The nine Knowledge Areas, most of which include activities in each project process group, are:

- **Integration Management**, which brings together all the parts of the PM discipline.
- **Scope Management**, which focuses on defining and controlling project commitments. "Scope" is defined as the sum of products and/or services to be delivered by the project.
- **Time Management**, which concerns delivering projects on time (or on schedule).
- **Cost Management**, which focuses on keeping projects' budgets under control.

- **Quality Management**, which is about using the right process to manage the project and ensuring the quality of products and/or services delivered to customers.
- **Human Resource Management**, which focuses on organizing and managing the project team.
- **Communications Management**, which ensures that appropriate communication occurs with project stakeholders.
- **Risk Management**, which minimizes problems on projects.
- **Procurement Management**, which addresses defining and managing project contracts.

### **PEOPLESOFT ESA MAPPED TO THE PMBOK**

To clearly demonstrate how PeopleSoft ESA both aligns and supports the PMBOK, a mapping exercise was performed, including the following steps:

- For each best practice the corresponding process group and knowledge area was documented, including the appropriate PMBOK section number.
- Then, the functionality that PeopleSoft ESA offers in support of each best practice is listed along with the actual software modules.

**The mapping of PeopleSoft ESA to the PMBOK is included as an Appendix to this document. This mapping shows comprehensive support for the PMBOK Guide (3rd Edition).**

### **PEOPLESOFT ESA OVERVIEW**

PeopleSoft ESA enables project-centric organizations and departments to establish core operational processes that support full project lifecycle management—across operations and finance—from project selection, planning and staffing, through execution, cost control, and analysis. PeopleSoft ESA provides a single, accurate view of all project related activities so you can choose and prioritize the right projects, assign the right resources, proactively streamline execution, and track profitability via accurate budgeting, forecasting, and billings/chargebacks.

#### **Seamless Integration, Complete Flexibility**

[PeopleSoft Enterprise Service Automation \(ESA\)](#) is a family of applications in [Oracle's PeopleSoft Enterprise](#) product line. Because PeopleSoft ESA integrates seamlessly with both PeopleSoft and non-PeopleSoft applications, information is always up-to-date across the enterprise. This includes [PeopleSoft Financial Management](#), [PeopleSoft Enterprise Performance Management](#), [PeopleSoft](#)

PeopleSoft ESA enables project-centric organizations and departments to establish core operational processes that support full project lifecycle management, as defined by the PMBOK.

[Human Capital Management](#), [PeopleSoft Asset Lifecycle Management](#), [PeopleSoft Customer Relationship Management](#), [PeopleSoft Supply Chain Management](#), and [PeopleSoft Supplier Relationship Management](#), to deliver complete solutions for all of your business processes. The modular nature of the PeopleSoft ESA family enables customers to deploy applications based on their specific needs.

### **Unique Industry Needs, Project By Project**

The manner in which projects are planned, executed, and controlled can vary widely from organization to organization. PeopleSoft ESA is equipped to address the unique challenges facing the most project-centric industries and departments, including: [Public Sector](#), [Professional Services](#), [Education & Research](#), [Financial Services](#), [Healthcare](#), [Engineering and Construction](#), [Media and Entertainment](#) and Internal IT.

### **PeopleSoft ESA Modules**

The PeopleSoft ESA modules include the following capabilities:

*PeopleSoft Project Portfolio Management* helps organizations evaluate, analyze, prioritize, and select the right set of projects based upon financial goals, strategic goals, and available funds.

*PeopleSoft Program Management* provides project managers the visibility and control they need to deliver their projects successfully, improve profitability, and operate more efficiently. It empowers project managers to plan the work, assign resources, forecast to completion, and communicate to stakeholders, while enabling team members to collaborate and communicate more easily in their efforts to review and complete project work.

*PeopleSoft Resource Management* helps you manage the capacity, utilization and assignment of people on project work. It aids in identification and deployment of the most qualified and available resources for your projects.

*PeopleSoft Proposal Management* allows you to prioritize opportunities and estimate costs and scope so you can gain visibility into your services pipeline, boost project profitability with accurate estimates and increase efficiency of project execution.

*PeopleSoft Contracts* helps you proactively manage contractual obligations, ever-changing contract specifications and complex relationships between customers and your organization. It facilitates and automates the administration of revenue recognition and billing for commercial, government, intercompany and research contracts.

*PeopleSoft Project Costing* empowers line managers with timely, detailed cost information to monitor project performance in a format that optimizes their productivity, while financial managers track the total cost of running the organization. This module is integrated with a wide range of complementary PeopleSoft Enterprise applications and third-party systems for accurate tracking of

project effort and costs that enables world-class program management, asset capitalization, billing and internal charge-backs.

*PeopleSoft Billing* provides flexible invoice generation features in support of complex billing needs. It streamlines the invoicing process, while providing a clear audit trail to the source of the transactions.

*PeopleSoft Expenses* allows your employees to capture and submit time and expenses in online, disconnected (*Mobile Time and Expense*), or wireless mode. It allows full project-based time and expense tracking and provides powerful approval and audit capabilities to ensure policy compliance.

*PeopleSoft Grants* enables managers of sponsored projects and research administrators to successfully compete for grant awards by increasing operational efficiencies, improving financial transparency, achieving regulatory compliance and driving fiscal accountability throughout their organizations. You can manage the full grants life cycle, including generating proposals, transitioning proposals into awards, award tracking, facilities and administration processing, billing and flexible financial reporting.

*PeopleSoft Enterprise Portal* provides unsurpassed integration to PeopleSoft applications and can be quickly configured for enterprise-wide web communities involving PeopleSoft business processes. Context manager features put critical information—embedded analytics, related policy documents, related contact information, related discussions and more—where users need it most, right beside their PeopleSoft transaction. Collaborative workspaces, content management, discussion forums and instant messaging maximize the creative potential of your community.

For more information on PeopleSoft ESA please refer to the following resources:

- [http://www.oracle.com/applications/peoplesoft/service\\_automation/ent/index.html](http://www.oracle.com/applications/peoplesoft/service_automation/ent/index.html)

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