



## PeopleSoft ESA for Internal IT Case Study

### Business Challenge

A Shared Services organization of software engineers was using off-line tools and manual processes to track resource utilization, forecast IT spend and calculate project actual costs against budget. Lack of accurate data prevented meaningful analysis and inter-unit chargeback to other business units.

Requirements for the ESA implementation

- ▶ Complete visibility and control into the utilization of internal and external resources
- ▶ Long term forecasting of resource needs and competencies
- ▶ Greater budget and spend visibility and accurate re-forecasting capabilities
- ▶ Ability to request projects, analyze project ROI and approve profitable projects through the use of automated workflow

### Solution

Implement PeopleSoft ESA for Internal IT including Program Management, Project Costing, Resource Management, and Expenses. The solutions must fully integrate with HR, Accounts Payable, Purchasing and General Ledger.

Using a rapid implementation methodology, Cardinal Point developed a pilot program to assess the viability of a vanilla PeopleSoft implementation. At the same time, our process specialists were leading design sessions and developing functional design documents that would deliver maximum functionality with minimal customization.

Cardinal Point led the effort to configure the production system; design, develop and test system modifications; and design training materials for all business processes and deliver training to over 200 end users.

### Business Process Automation included the following:

- ▶ Project accounting, time and expense management;
- ▶ Resource management including utilization and capacity planning;
- ▶ Accurate IT budget and spend analysis including long term forecasting;
- ▶ Estimate to complete analysis;
- ▶ Project status, health and risk analysis.

### Business Benefits

- ▶ Alignment of projects with core business objectives
- ▶ Leverage project standards and controls
- ▶ Analysis estimates to complete for more accurate project estimates
- ▶ More accurate budgeting and forecasting capabilities
- ▶ Visibility into resource utilization and capacity planning
- ▶ Business Intelligence dashboards for real time insight into project analytics

*“Cardinal Point added tremendous value during every phase of our implementation”*

– Program Manager,  
LexisNexis