



Technology Associates Limited

CASE STUDY

INTERMIX™ for Microsoft Project Online (Office 365 PPM) allows blue-chip high tech firm Pace plc to achieve automated 'hands-off' integration with legacy data, whilst removing barriers to cloud adoption

When Pace plc needed a way to eliminate thousands of hours of manual data entry so that their executive business intelligence and reporting could be delivered through Office 365 PPM (Microsoft Project Online), we developed a solution that leveraged Office 365 PPM, including Microsoft Project Online, and Azure. Having developed a trusted advisor relationship with Pace since 2002 when they first became our customers, it was a logical step for them to ask Technology Associates to solve this massive data integration problem for them.

In Pace plc, all top level project data is entered into an Oracle system (part of a legacy program). Having first implemented Project Server 2002 for Pace in 2003, and subsequently upgrading them to Project Server 2003, then 2010, and then migrating them to Microsoft Project Online, the data sitting in their Oracle system was immense. And with more than 800 live projects, and thousands of employees relying on accurate, up to the minute information for the tasks and activities they need to undertake to deliver and execute on their projects efficiently and effectively, a way of being able to transfer the data from the Oracle system to Microsoft Project Online was required.

In addition, Pace plc used Oracle HR for storing information related to all staff within the business and covering a wide geographical spread of countries including UK, USA, Brazil, France, Spain, Germany, Australia, India and many others.

This staff (resource) related information also needed to be updated in the Resource Pool in Microsoft Project Online, so that reporting of Resource workload, availability, and assignment by say, business unit, location, or category, could be generated through PowerPivot for Excel and Excel Services reports that would be directly accessible through the Reports Center in Microsoft Project Online.

We developed a solution initially as a custom solution for Pace plc, but it soon became apparent that the solution would address the same problem for many other companies needing to migrate data from legacy to cloud-based solutions. For Pace specifically, the ability to synchronize the data between Oracle and Project Online meant that we were able to remove any barriers to adoption of a cloud-based solution and it allowed the company to acquire Office 365 and Project Online licenses in order to complete their migration from an earlier version of Project Server to the cloud-based Project Online solution.

Intermix for Microsoft Project Online provides a synchronization process for both project data AND resource data. In the case of project data, a unique numerical code is the unique identifier in the source data and entered once into a custom project field in Project Online for each project. Once done, when the synchronization process is run, the solution ensures that the data in the source database is populated into the identified fields for each Project in Project Online. Synchronization may be

skipped for "test" or "lone" projects that may exist in Project Online, or in cases where there is no corresponding project data in the original data source. For the resource synchronization, custom fields (e.g. division, location, etc.) can be populated and the process is done using an Employee Reference code field.

Synchronization is selectable between project data, resource data or both, and after synchronization, there is the option to also have the projects republished so that project sites are updated and information in the Project Center is updated. Full error logging is provided as part of the solution. And timeout length (for re-publishing projects) can be modified to take account of very large numbers of projects where the publishing queue needs to be controlled more precisely.

Contact Technology Associates for more information:



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Although we looked at developing a web service initially, the amount of data transfer and the processing of that data meant that using Azure as a platform to host both the solution and the intermediate data for more rapid processing (as well as security of data backup) was by far the preferred option.

The solution was delivered in May 2015 to Pace and later improved with one or two changes to speed up the project publishing process. Once the projects and resources have had all of their data updated then the projects themselves then have to be published again to ensure that the project data visible in the Project Center is accurate and up to date, as it is this data that is used to generate the reports via Excel Services and PowerBI.

Graeme Kennedy, from IT Systems at Pace commented on delivery of the solution, "We are delighted with this solution. This represents a significant development in our ability to move to the cloud and to utilize all the features of the Microsoft cloud-based technologies. Technology Associates have once again proven their place as Trusted Advisor to our business."

Kelvin Kirby of Technology Associates said, "We are really pleased with this solution and how it evolved during the development process. We designed it in such a way that it opens up new possibilities for how the control of the data transfer is done between legacy and Microsoft cloud-based services, and unlike other data integration solutions, ours goes several steps further because

not only do we handle the project publishing process (which means reports are always accurate and up to date), but we allow some control over the queuing and processing of that data, so that processing times are optimized for the bandwidth available".

Commenting on the future development of the product, Kirby added, "We'll be improving it and developing the product as a fully available solution in the Office365 marketplace in due course, and allowing the customer to be able to select one or more data sources for the integration. We are proud of this product and we see good take-up of this going forward. We fully expect this to become one of our flagship products".

Summary:-

This solution saved thousands of hours of manual data entry and manual publishing of projects is now a thing of the past. Automation of data exchange and publishing has saved the business an estimated £628,000 over the course of one year. These costs savings are based on the time it would have taken to manually update changes in data every day over a one year period, the savings in publishing time now that project managers do not need to publish projects, and the efficiencies gained from being faster to deliver key reports and improvements in the speed of decision making because the BI reporting is faster, quicker and more accurate than could have been achieved by a more conventional process.

Products used:-

- Microsoft Office 365 PPM
- Microsoft Project Online
- Microsoft Excel Online (Excel Services)
- Microsoft PowerBI
- Microsoft Azure (for intermediate data storage and hosting of the application service)
- Microsoft Visual Studio (for the development)
- Windows Server 2012 (on the Azure hosted platform)

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