



# Customer Case Study

## Integrating Your PSA with Critical Business Systems

November 11, 2009



Proprietary and Confidential

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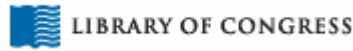
# Agenda

- Portal Solutions introduction
- How we use OpenAir
- What systems do we use?
- Integration Overview
- Q&A

## Portal Solutions – Business Profile

- Founded in 2002, Serving Mid-Atlantic
- 7 years of continuous profitability
- Microsoft Gold Certified Partner in Information Worker Competency. Microsoft “Managed” Partner and Go To Partner for SharePoint
- Member of SharePoint Technology Adoption Program “TAP” 2007 and 2010

## Sample Clients



## Market recognition



Information Worker Solutions  
Custom Development Solutions



## Services

### Advisory

- Roadmap
- Planning

### Managed

- Support
- Maintenance
- Training
- Monitoring

### Implementation

- Full Life Cycle solution development
- QuickStart
- Migration
- Proof of Concept
- System Integration

## Core Competencies

### Focus

- Intranet and Extranet Portal
- Web Content Management (WCM)
- Web Based and Project Collaboration
- Enterprise Reporting and Dashboard
- Enterprise Mashup
- Application Development
- Workflow and business process automation
- Integration with back-end systems

### Technology

- SharePoint WSS, MOSS
- PerformancePoint Services
- SQL Reporting Services
- .NET Development
- SilverLight
- Integration of 3<sup>rd</sup> party solutions

# Why Integrated PSA

- Integrated systems for Professional Services Automation
  - Systems usually found in Services firm
    - CRM, Sales, Marketing
    - Project Management Systems
    - Time entry
    - Expenses
    - Accounting/Financials
    - Ticketing systems

# Benefits of integrated PSA

- Reduce manual data entry and mistakes
- Provide 360 vision of your customers
- Reduce complexity
- Increase operational visibility and insight to your customers
- Improve process efficiencies
- Automate business processes

# What systems do we use

- Microsoft Dynamics CRM for Sales/Lead/Opportunities tracking and Service ticketing
- OpenAir for Time Tracking, Project Management, Expenses, Billing, Resource management Forecasting and Management tool
- Microsoft SharePoint for document management, project document tracking and collaboration
- QuickBooks Online for Accounting (GL, AR, AP)
- Microsoft Project for initial scheduling and pricing

# How we use OpenAir

- OpenAir users since 2006
- Schedule an average of 60 projects with 40 resources (full-time/contractors/offshore resources)
- Manage Resources allocation, time tracking, utilization, project tracking, invoicing and financial analysis
- Measure backlog
- Key Issues:
  - Resources allocations, back-log forecasting
  - Disseminating project updates to very demanding clients
  - Ensuring resources are booked early enough in the sales process

# How we use QuickBooks

- Manage deposits and receivables
- Manage and process Payables
- Bank reconciliation
- Produce financial statements



# How we use SharePoint

- Extranet Project workspaces for every engagement
  - Used to track project deliverables and documents
  - Record Issues, Bugs, Risks, Change Requests
  - Collaborative document sharing with our clients
  - Integrate key metrics/data from MS CRM, OpenAir and Quickbooks
  - Built on Microsoft Office SharePoint Server “MOSS”

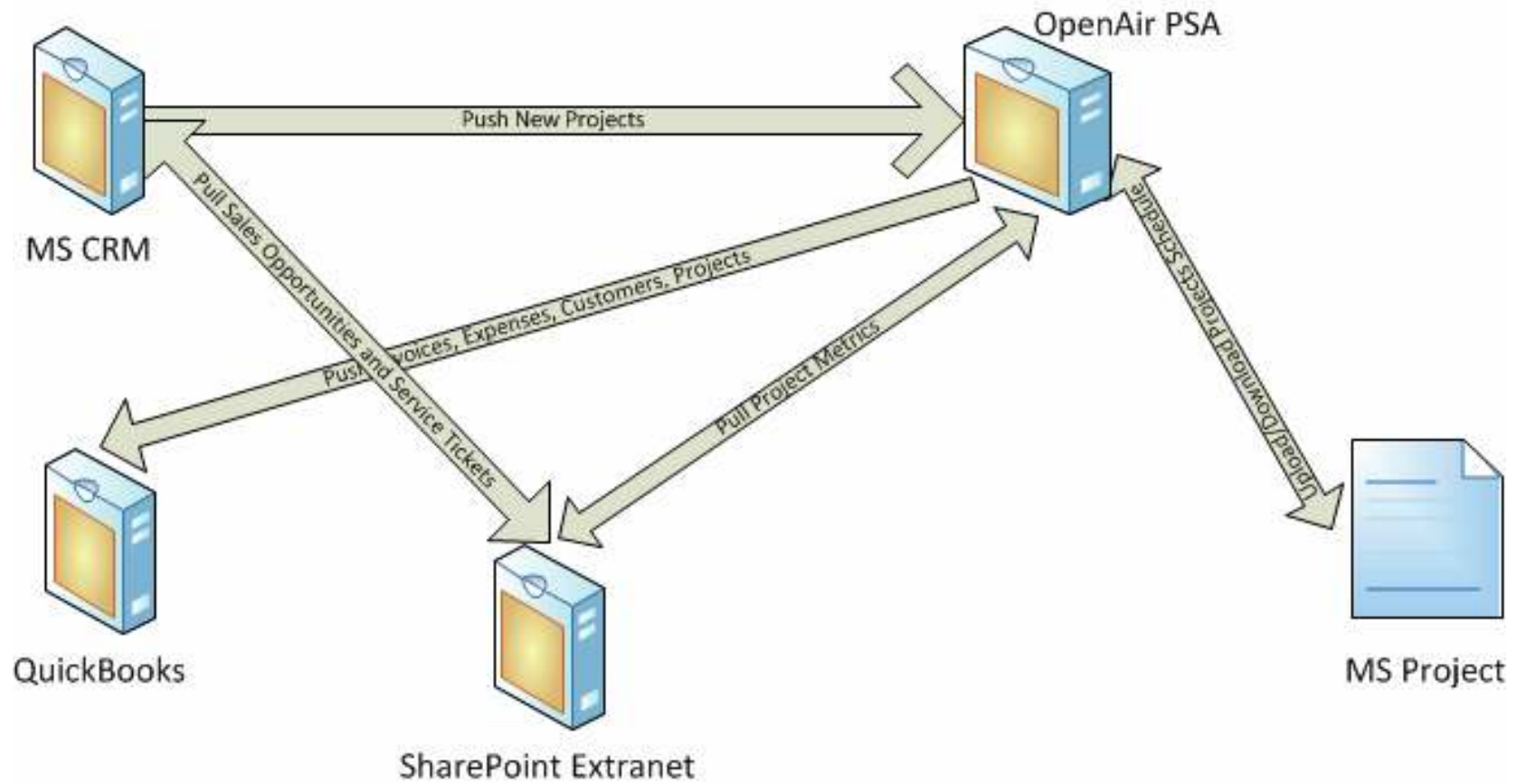
# How we use Microsoft CRM

- Track and manage leads and opportunities
- Track customers correspondence and activities
- Track tickets (support cases)

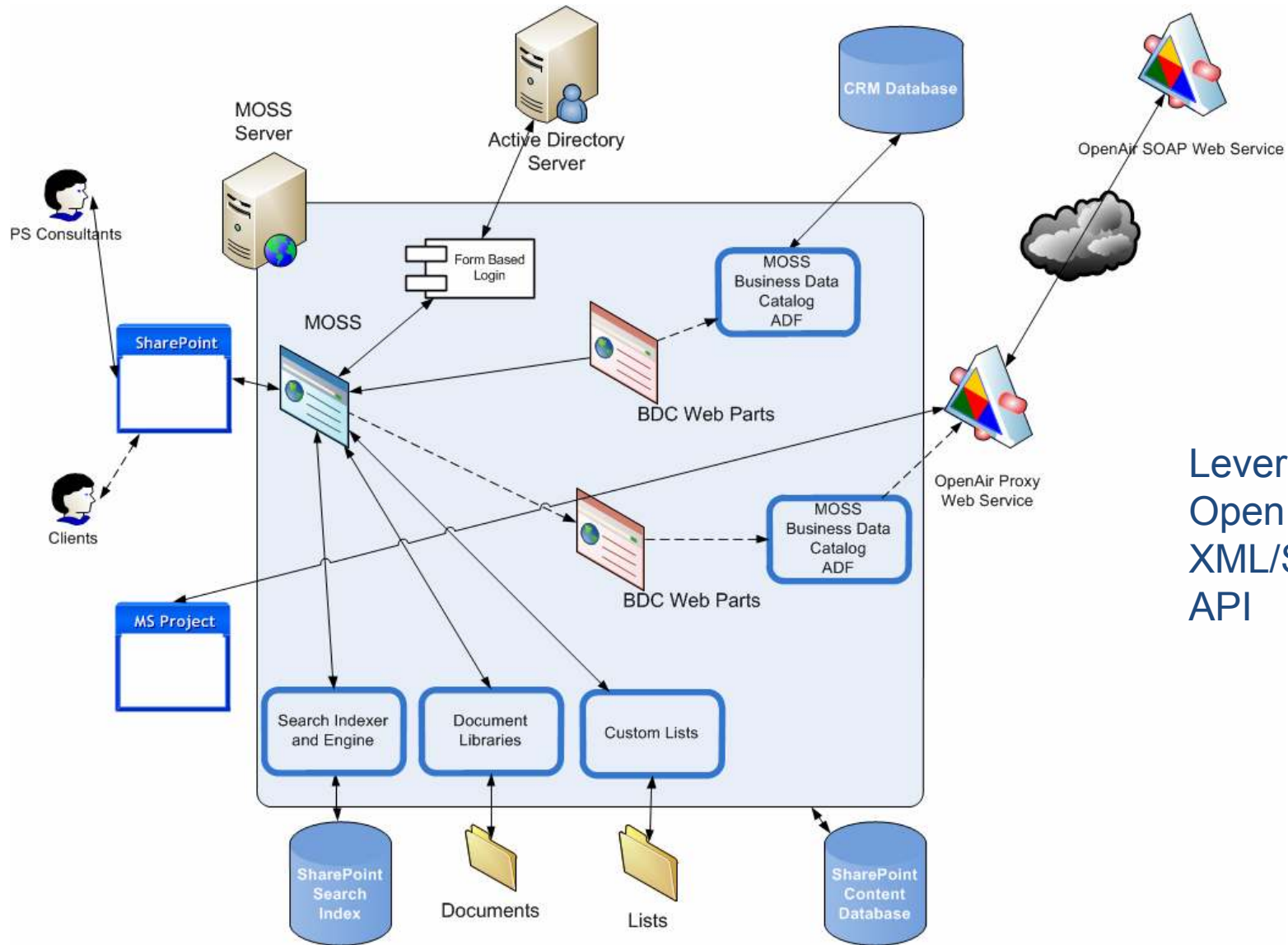
# How we use Microsoft Project

- Initial Scheduling and Project Pricing
- Upload to OpenAir to create projects and tasks
- Download from OpenAir to provide MS Project updates to our clients

# Putting it together



# Under the hood



Leveraging  
Open Air  
XML/Soap  
API

# Extranet Screenshot – Showing OpenAir Metrics



Project Template

All Sites

Advanced Search

Site Actions

- Documents**
  - Documents
  - Deliverables
- Lists**
  - Announcements
  - Milestones
  - Issues
  - Bugs
  - Risks
  - Project Conversation
  - Change Requests
- Discussions**
  - Team Discussion
- Links**
  - Client Dashboard
  - PM View
  - My Dashboard

**Project Template**

**Announcements**

Title: \_\_\_\_\_ Body: \_\_\_\_\_

There are no items to show in this view of the "Announcements" list. To create a new item, click "New" above.

Add new announcement

**Milestones**

New | Actions | Settings

Title	9/28/2008					10/5/2008					10/12/2008					10/19/2008									
	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	
Kick Off Meeting																									
Design																									
Build																									

**Task List**

Title	Priority	Status	Assigned To	Description	Start Date	Due Date	% Complete
Kick Off Meeting <b>NEW</b>	High	In Progress			10/2/2008	10/2/2008	
Design <b>NEW</b>	High	In Progress			10/3/2008	10/6/2008	
Build <b>NEW</b>	High	In Progress			10/10/2008	11/20/2008	

**Deliverables**

Name	Document Author	Project Phase	Topic	Document Description
There are no items to show in this view of the "Deliverables" document library. To create a new item, click "New" or "Upload"				

**Change Your Password**

Welcome **Daniel Cohen-Dumani**, you are logged in as **PORTALSOLUTIONS\daniel**

[Change Password](#)

**Project Indicators**

Name:	Facebook Pilot
Customer Name:	[Redacted]
Start Date:	3/28/2007
Finish Date:	8/6/2007
Project Owner:	
Project Stage:	Closed
Budget:	\$5,000
Hours Invoiced:	170
Hours Budgeted:	150
Hours Worked:	673 <span style="color: red;">●</span>
Hours Planned:	1,518

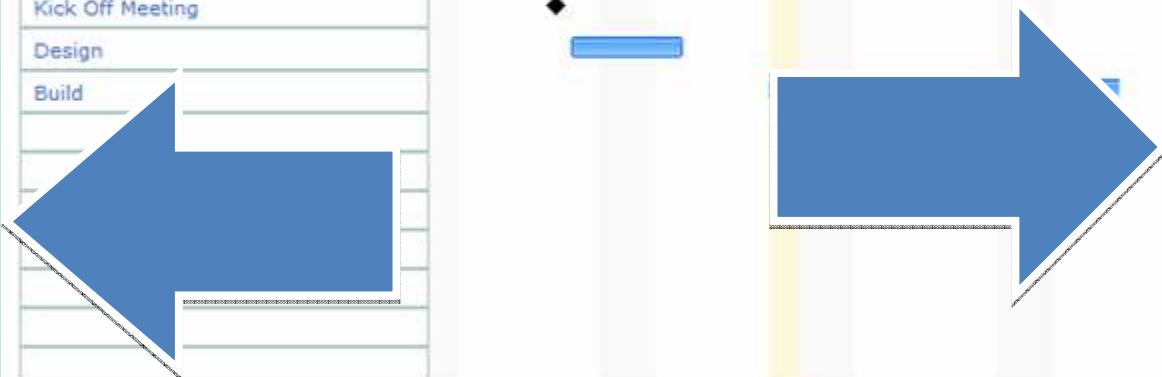
**Consulting Team**

**Online**


None of the users are online.

**Not Online**

- [Redacted]
- PORTALSOLUTIONS\allps
- [Redacted]



# Extranet Screenshot – Showing OpenAir Metrics


**Project Template**
All Sites

Project Template > Pages > Dashboard

## Dashboard

### Project Indicators

Name:	Facebook Pilot
Customer Name:	[REDACTED]
Start Date:	3/28/2007
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Hours Invoiced:	170
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Hours Worked:	673 <span style="color: red;">●</span>
Hours Planned:	1,518

### Current Tasks

Actions ▾

Task	Estimated Start	Estimated End	Planned	Approved	Billed
<b>PhaseName: Launch</b>					
Deploy solution to WC server	5/29/2007	5/30/2007	8	0	0
Configure environmental dependencies	5/30/2007	6/1/2007	8	0	0
<b>Test</b>					
Solution ready to launch	6/1/2007	6/5/2007	16	0	0
Solution ready to launch	6/5/2007	6/5/2007	0	0	0
<b>PhaseName: T&amp;M Support</b>					

### Invoice

Actions ▾

#	Invoice Date	Date Sent	Status	Payment Terms	Invoice Amount
210	8/20/2007	8/27/2007	Viewed	Net 10	\$7,031
231	9/17/2007	9/17/2007	Viewed	Net 30	\$5,741
252	10/2/2007	10/2/2007	Viewed	Net 10	\$1,924

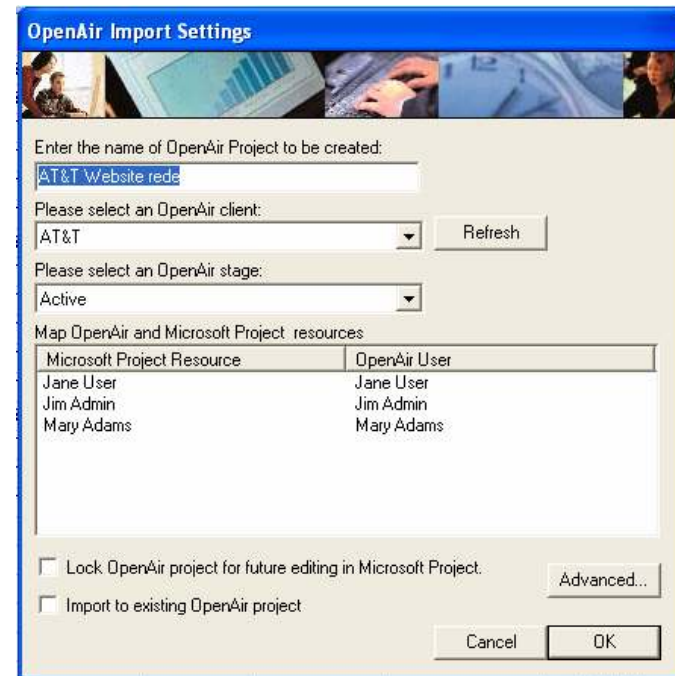
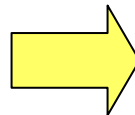
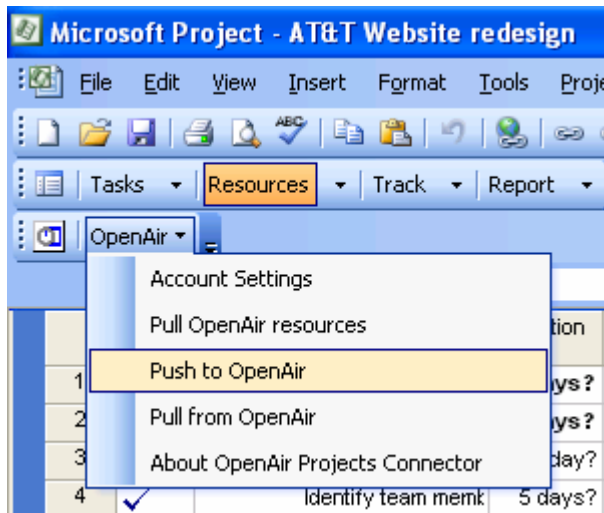
### Payment List

Actions ▾

Invoice #	Receipt Date	Receipt total
3220	11/30/2007	\$7,031
3262	10/12/2007	\$1,429

# MS Project to OpenAir Integration

- MS Project to OpenAir Push





# Backlog Review

- Measuring backlog

Color Coding : 0-50 ■ 51-80 ■ >= 81 ■

show all ▶ hide all

User 

User/Project	Manager	Department	Nov-2009	Dec-2009
▶ Network Engineer			6	11
▶ Off Shore Developer			56	0
▶ Project Manager			13	59
▶ Sr Consultant			50	80
▶ Adams, Andrew	Ward, Ryan	Consulting Practice	166	117
▶ Anoyari, Prashant	Garrett, Robert	Consulting Practice	70	0
▶ [Redacted]	Orskov, Val	Consulting Practice	100	25
▶ [Redacted] Meysel	[Redacted]	Consulting Practice	83	47
▶ Dennis, Clay	[Redacted]	Consulting Practice	111	68
▶ Fernandez, Carlos	Garrett, Robert	Consulting Practice	138	80
▶ [Redacted]	[Redacted]	Consulting Practice	128	88
▶ [Redacted]	Garrett, Robert	Consulting Practice	8	2
▶ [Redacted] Noah	[Redacted]	Consulting Practice	76	0
▶ [Redacted]	[Redacted]	Consulting Practice	216	182
▶ [Redacted]	[Redacted]	Consulting Practice	101	57
▶ Orskov, Val	Cohen, Dwayne	Consulting Practice	45	50

# MS CRM to SharePoint integration

- Show MS CRM cases in SharePoint (client self service)

**PORTAL SOLUTIONS** Maintenance - RRA All Sites

Extranet > Maintenance - RRA

### Case List

Case Ticket Number	Title	Case Priority	Case Severity	Case Status	Follow Up By
CAS-01152-V8VL	Publishing and Synchronising Excel tables	Normal	3 - Medium	In Progress	
CAS-01111-TT2G	Warning Message when opening documents	Normal	4 - Minimal	In Progress	
CAS-01215-B0NG	FW: UltRRA Survey	Normal	3 - Medium	In Progress	
CAS-01217-F3XL	@RRA Home page fonts and colours	Normal	3 - Medium	In Progress	
CAS-01218-M6WL	"Send to" Feature Not Working	Normal	2 - Significant	In Progress	

### Maintenance Reports

Type	Name	Document Author	Project Phase	Checked Out To	Version
<b>Content Type : Maintenance Report (3)</b>					
Word Document	RRA Maintenance Report August 09	Gary Hess			2.0
Word Document	RRAMaintenanceReport3june09				2.0
Word Document	RRAMaintenanceReportjuly09				2.0

Add new document

# Intranet Integration

- Show timesheet status on our intranet

PSNet

**Timesheets List**

Actions ▾

User	Manager	Current	PrevWeek	PWeek
A	W	O	A	A
E	Ge	O	A	A
E	On	X	A	A
C	Sh	X	S,S	A
C	Co	X	A	A
C	Ge	X	A	A
D	Na	O	A	A
F	Ge	X	A	A
C	Sc	O	A,A	A
H	Sh	X	A	A
H	Sh	O	A	A,A
H	Sh	O	A	A
I	Sh	X	A	A
I	Sh	X	A	A
I	Sh	X	S	A
K	Sh	X	A	A
L	Ge	O	A	A,A
M	W	O	A	A

# Show Utilization numbers

- Pull Utilization metrics from OpenAir into SharePoint intranet

our clients success will building a profitable business, and sometimes we make decisions to invest hours in the short term to secure long term mutual success.

**Portal Solutions Utilization Information**

Update | Find | View: **Monthly**

**Note: All information is Portal Solutions Confidential, do not distribute**

Team Member	Role	Billable Target (2080 hrs)	Average	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09
[Redacted] Daniel	CEO	0.00%	103.69%	104.89%	104.76%	102.84%	102.27%	
[Redacted] Marty	COO	0.00%	106.90%	100.00%	101.19%	126.42%	100.00%	
[Redacted] Liz	Admin/Project Coor							
[Redacted] Val	Chief Architect	51.46%	141.13%	171.36%	156.87%	135.47%	100.81%	
[Redacted] Robert	Mgr Director	51.46%	106.50%	68.92%	125.92%	117.86%	113.31%	
[Redacted] David	Mgr Director	51.46%	86.29%	72.72%	82.76%	95.70%	93.99%	
[Redacted] Jeff	Mgr Director	51.46%	101.01%	58.32%	100.62%	119.85%	125.24%	
[Redacted] Carlos	Sr. Consultant	85.77%	112.05%	102.82%	105.00%	134.69%	105.71%	
[Redacted] Hector	Sr. Consultant	85.77%	57.51%	41.13%	55.60%	31.84%	101.45%	

QA

# Contact

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- Phone: 240-450-2166 x 101
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