

Portal Solutions

www.portalsolutions.net



At A Glance:

- **Company:** A technology consulting firm that focuses on Microsoft's Collaborative Technologies.
- **Employees:** 24
- **Industry:** Consulting; Technology
- **Location:** Rockville, MD
- **Challenges:**
 - Portal Solutions lacked an automated time tracking system.
 - As a result, invoicing was a manual process.
 - The company had minimal control over their resources and projects.
- **Results with OpenAir:**
 - Satisfaction. Company's clients love the self-service nature of OpenAir.
 - Flexibility. OpenAir integrations enable Portal Solutions to showcase their own product while enhancing the customer experience.
 - Visibility. Managers can view exactly what their consultants are working on.
 - Accuracy. Real-time metrics provide the basis for stronger, more accurate forecasts.



“Our clients feel much more at ease knowing they have access into how their investment is progressing.”

— *Daniel Cohen-Dumani, CEO*
Portal Solutions

Results

Through access to OpenAir's application programming interface (API), Portal Solutions has been able to extend the system into various areas of their business. As experts of Microsoft SharePoint, the organization has developed a portal which provides their clients with key insight into OpenAir projects.

“By displaying OpenAir project metrics within SharePoint, we have created a self service for our clients to review mission critical project metrics,” said Daniel Cohen-Dumani, CEO of Portal Solutions. “This has also allowed us to showcase what our product is capable of doing.”

By supplying their clients with this portal access, Portal Solutions not only empowers their clients with greater control, but also demonstrates the very type of product they plan to deliver.

Unlike stand-alone project management systems, OpenAir provides an integrated tool that tracks the entire lifecycle of projects. This provides crucial, real-time metrics that are absent in other solutions. With this automation achieved, Portal Solutions would be able to track costing, time and expense, and billing with increased accuracy and insight.

The greatest challenge that Portal Solutions addressed through OpenAir was their resource planning. “We need to know what projects they are scheduled to work on during any given day as well as where they actually were on those days. With OpenAir we can compare planned vs. actual figures and discover discrepancies.” This powerful data enables Portal Solutions to become better planners and forecasters.

The Challenges

Prior to using OpenAir, Portal Solutions had few business processes in place. At the base level, time tracking was logged manually.

As a result, invoicing of consultant time was also done manually. This produced a process that was often behind schedule and error prone.

 **Find out more: contact OpenAir at 1.888.367.1715 or visit www.openair.com**



“By displaying OpenAir project metrics within SharePoint, we have created a self service for our clients to review mission critical project metrics.”

*— Daniel Cohen-Dumani, CEO
Portal Solutions*

“It felt like we were in a constant state of chaos,” said Dumani. “There was minimal control and a complete lack of visibility into our projects and resources.”

By signing on with OpenAir, Portal's goal was to merge project planning, execution, and invoicing into one automated system.

The Solution

Microsoft Office SharePoint includes a Business Data Catalog, a service that provides integration between SharePoint and other back end systems. With software programs written in different ‘languages,’ Portal developed a layer to take the web service data in OpenAir and present it to the Business Data Catalog.

“In order for the two systems to ‘talk’ to each other effectively, we built a layer that essentially translates our OpenAir data into a Microsoft friendly form. Once our OpenAir data is run through the layer, we can easily send it to SharePoint.”

Through this integration, planned and worked hours, percent complete, and project start and end dates are brought over to Microsoft SharePoint into a project workspace. Now, Portal Solutions’ clients are able to log into SharePoint and receive on demand project information including task schedules, planned vs. actual budget figures, and incurred time and expenses.

This enables their clients to review this data within robust dashboards and graphs. “Our clients love the abilities this integration gives them. They feel much more at ease knowing they have access into how their investment is progressing.”

OpenAir’s API has also provided Portal Solutions with a seamless integration between OpenAir and their QuickBooks Online account. By leveraging OpenAir’s Integration Manager, Portal Solutions has greatly simplified their bookkeeping processes.

“OpenAir is our core system for operations while QuickBooks acts as our bookkeeping system,” said Cohen-Dumani. “With this seamless integration, we perform our financial analysis in OpenAir and then push our pertinent line items over to QuickBooks to rectify our records.”

OpenAir’s QuickBooks integration enables organizations to push accounts receivable (AR) and accounts payable (AP) figures to QuickBooks. Incurred expenses may be pushed over for employee reimbursement while revenue transactions are mapped to the appropriate general ledger code for accurate revenue tracking.

By providing access to their API, OpenAir enables organizations to truly mold the system to fully address their business needs. Portal Solutions has been able to use their industry expertise to create unprecedented access for their clients. As a result, their clients are much more satisfied which has led to increased business and higher profits.

 **Find out more: contact OpenAir at 1.888.367.1715 or visit www.openair.com**