



Seamlessly connecting project management and billing

Enhanced integration between Microsoft Project and NetSuite SRP



The Challenge

- Shift from NetSuite OpenAir to NetSuite Services Resource Planning (SRP) for time and billing management
- Integrate NetSuite SRP with Microsoft Project, linking forward-planning with real-world billing
- Eliminate manual updates via import and export of data
- Create a smart system, seamless to end-users, easily capturing time and billing data



The Solution

- Partner with Microsoft expertise through the team at Peregrine
- Create an enhanced integration designed to deliver efficiencies in project management
- Deployment of Microsoft Project plug-in for NetSuite, developed by Peregrine
- Reduce time spent managing and synchronizing data overall, while capitalizing on in-house expertise in Microsoft Project
- Rely on Microsoft Project's advanced capabilities, while positioning NetSuite SRP to complement company operations



The Benefits

- Smooth transition to NetSuite SRP, seamless to Microsoft Project end-users
- Eliminate the need for manual tracking of time and billing data
- Handle increased growth without adding staff
- Reduce human errors in data entry
- Dramatic time savings across the project management team

“Peregrine developed an enhanced integration linking Microsoft Project and NetSuite SRP for our project managers. Project management and planning is now seamless with time and billing, allowing us to work more intelligently and productively than ever before.”

Scott Quin, Senior Director, Power Costs, Inc.

“PCI now has a far more robust and coordinated platform thanks to the Microsoft Project plug-in from Peregrine. Their Microsoft expertise and integration experience enabled a smooth shift from OpenAir to NetSuite SRP. Our Microsoft Project team is more effective and our billing processes connect directly with our project planning system.”

Scott Quin, Senior Director, Power Costs, Inc.

The Client

Power Costs, Inc. (PCI) develops software solutions for the energy industry, helping ensure its customers capitalize on the latest technological advancements and market rule changes. PCI serves the broadest range of energy providers, including small to large investor-owned utilities, municipal and cooperative utilities, independent power producers, and marketing and trading organizations. For more than two decades, PCI has set the standard for developing customer-driven software that energy trading and power generation companies use to keep their energy in focus.

The Challenge

PCI used Microsoft Project to manage its slate of accounts, while relying on OpenAir's software to manage time and billing and activities such as accounts payable and receivable. Following Oracle's purchase of OpenAir and competitor NetSuite Services Resource Planning (SRP), Oracle announced the shuttering of OpenAir. "We knew OpenAir's sunset was on the horizon, and we opted to switch to NetSuite SRP for more functional time and billing operations," said Scott Quin, senior director, PCI. "The decision was also expedient because we wanted to integrate Microsoft Project with our time and billing system. While OpenAir offered an add-in for this purpose, it performed so poorly that we felt an alternative platform was a smarter path."

Yet this decision presented a new challenge – NetSuite SRP did not offer its own connector to Microsoft Project. With no built-in option for integration, PCI was conducting manual imports and exports between the two platforms. This was a cumbersome and potentially error-prone form of data management that could hinder effective billing. Data synchronization was too complex and needed a simple link between the two platforms.

"Microsoft Project is our tool of choice, ideal for our end-users who are all highly skilled in the application. But while it offers the ability to plan and manage projects, it remains a forward-looking project tool. PCI needed a way to import actual time from NetSuite to Microsoft Project as opposed to manually entering time in. We needed a more effective and seamless way to coordinate the two systems," said Quin. Managing and tracking projects in the smartest manner would require a two-way interface between Microsoft Project and NetSuite SRP.

“The critical relationship between Microsoft Project and NetSuite SRP is all about saving time and reducing errors. It’s smart data integration that allows our team to handle growth without increasing headcount.”

Scott Quin, Senior Director, Power Costs, Inc.

The Solution

Tapping into deep Microsoft and integration expertise, Peregrine stepped in to provide its existing add-in product that connected and easily synchronized the two platforms. While Peregrine’s add-in capabilities were optimized to link the two systems, the key to success was to focus on PCI’s specific performance needs.

“We wanted several specific outcomes from the integration. It needed to enable us to create new projects in NetSuite from Microsoft Project; download existing project tasks from NetSuite to Microsoft Project; download actual time from NetSuite and upload our resource allocations to NetSuite,” Quin said.

To achieve this, the teams on both sides worked together to bring each other along, clearly syncing up PCI’s needs with Peregrine’s knowledge and capabilities. For example, Peregrine provided an early version of its add-in for PCI to test, enabling them to gain familiarity with its features and performance. With near-daily communication via WebEx to discuss requirements and test the add-in’s functionality, Peregrine clearly understood PCI’s use cases and how its project managers needed to use the add-in during their daily routines. The project took less than 60 days and resulted in a successful integration between Microsoft Project and NetSuite SRP, meeting and exceeding PCI’s requirements.

“Peregrine was able to create synergy between the two systems. We now have a forward-looking planning instrument, coordinated directly with time and billing. It’s truly transformational, eliminating finely-detailed manual processes and increasing efficiencies across the team. Our end-users are Microsoft Project experts and this enhanced integration just capitalizes on their abilities.”

Peregrine accelerated deployment by creating and setting defaults for selected custom fields in NetSuite SRP. Peregrine also added the ability to manage custom fields in the system’s overall functionality. “The add-in is easy to use – PCI’s IT team is not involved and the platform is used solely by our team of project managers. The data connection simply appears as an additional menu on the familiar Microsoft Project toolbar.”





The Benefits

As a result of the enhanced integration, PCI is handling a greater number of projects without the need to increase headcount. Human error is greatly reduced as well, with automation replacing the need for data to be entered twice. “The system is a major time saver, it is that simple,” said Quin. “Project managers no longer have to waste time manipulating data and entering it in two places. At the same time, Peregrine also ensured that our team did not experience significant changes to established workflows.” PCI’s project managers simply create and maintain their project plans in Microsoft Project, with little or no need for additional changes in NetSuite SRP.

“This project was all about time management, both improving time spent overall and eliminating waste,” said Quin. “By reducing time spent manipulating data, our teams have more

resources for analyzing results and taking action based on those results. We have a comprehensive solution that helps us manage our resource allocations more effectively than ever.”

The Peregrine plug-in for Microsoft Project has also simplified creating and implementing project roadmaps, critical against PCI’s backdrop of a growing client base. “PCI project managers work on three or more assignments at any given time,” says Quin. “And yet we are working smarter and more efficiently because of Peregrine.”