



## CorpInfo Success Story

# Procurement Management Solution Based on Microsoft EPM

"We required greater visibility of projects and improved monitoring. We have rigorous audit and quality checks that are highly time dependent and must be coordinated precisely."

Manager of Contracts & Procurement

**Customer:** Regional transportation agency

### Business Challenge:

An agile procurement management system was required to control the increasing workload due to record ridership gains.

- Effectively manage increasing workloads while providing timely reports
- Streamline procurement processes
- Increase project visibility and monitoring
- Improve resource management

### Solution:

A customized procurement management solution based on Microsoft EPM that provides:

- Ad hoc reporting and real-time tracking
- Workload and resource management
- Customized templates
- Automated workflows that enforce standardized business processes

### Technology:

- Microsoft Enterprise Project Management
  - Microsoft Office Project Server 2007
  - Microsoft Office Project Professional
- Microsoft SQL Server 2000 Enterprise
- SQL Analysis Services
- Windows SharePoint Services

### Project:

- Server virtualization allowed existing hardware to be used.
- CorpInfo developed customized templates based on a comprehensive process analysis
- CorpInfo provided documentation, technical knowledge transfer, and on-site technical and user training.

### Results:

Improved productivity, enhanced reporting, and standardized business processes have empowered the agency to streamline contract management and better support new projects.

End-user training, along with the initial staff interviews, generated buy-in and support.

### Solution

CorpInfo tailored Microsoft Office Enterprise Project Management's (EPM) flexible capabilities to rapidly deploy a procurement management system that provides ad hoc reporting, real-time tracking, and comprehensive resource management.

Since procurement management templates are not available for EPM, CorpInfo developed customized templates to manage five primary contract categories and created automated workflows that enforce standardized business processes.

Prior to developing the templates, CorpInfo conducted a detailed process analysis of the existing workflows. CorpInfo interviewed staff representing a cross-section of procurement responsibilities and management. From these interviews, comprehensive business processes were documented for all five categories.

### Business Value

#### Standardized Business Processes

The templates impose consistent processes for procurement and contract management. In the event an employee is not familiar with a particular procurement process, the templates outline tasks, milestones, timelines and assigned roles. The solution maintains a complete audit trail and provides a consistent procurement and contract portfolio.

#### Collaboration

Employees collaborate extensively to define project requirements and publish documents. To facilitate this, CorpInfo implemented SharePoint Services for document management.

#### Workload Management

Project Server improves workload management by providing access to resource assignments at the task level. This enables management to immediately identify current capacity and resource availability. Employees leverage it to manage their workloads and monitor progress. It allows them to prioritize work and focus on strategic tasks.

#### Reporting

Comprehensive real-time performance reporting supports ad hoc management requests. Task-level project status allows any issues impeding progress to be reviewed and provides additional insight into the barriers that may be preventing progress.

### Results

Improved productivity, enhanced reporting, and standardized business processes have empowered the agency to streamline contract management and support new projects.

**Microsoft®**  
**GOLD CERTIFIED**

Partner

