

PROJECT]open[

"We can now reconcile work done with its financial impact, and be proactive about it with stakeholders."

Nathalie Aerens
Director of Management and
Scientific Support Group

Ouranos

Tracking projects with multiple sources of funds in public administration

Nathalie Aerens and her team are tasked with a classic albeit challenging problem: reconciling the efforts spent on scientific projects with their financial status. This was complicated by the fact that each project could be financed from multiple sources, and each stakeholder requires its own report and provides its own formats. "How can we respond to each financier and still keep a light administrative footprint?"

About Ouranos

Ouranos is a consortium created in 2001 as a joint initiative by the Québec government, Hydro-Québec, and Environment Canada, with the financial support of Valorisation-Recherche-Québec. Its mission is to acquire and develop knowledge on climate change, its impact, and related socioeconomic and environmental vulnerabilities in order to inform decision makers about probable climate trends and advise them on identifying, assessing, promoting, and implementing local and regional adaptation strategies.

Ouranos' projects vary in scope from several thousands of dollars to multimillion portfolios and they can span a couple of months to multiple years.

About Metamorphose Technologies

Ouranos collaborated with Metamorphose Technologies, specializing in process optimization and the deployment of business solutions. This project was executed with only minor inputs from the]po[team as the solution was simple to deploy and operate.

The Challenge

During its first decade of operations, Ouranos could easily get by with spreadsheets: the organization acted as a coordinator for external research projects, financed by a handful of funds. But then Ouranos started delivering projects directly and the number of financiers grew and, with it, the accounting overhead. Auditing and the financiers' requests for information became more specific and urgent.

Makeshift requests to project members were frequent, wasting everyone's precious time and energy; approximations had to be made and constantly reassessed; spreadsheets were spreading... The administration team's main efforts were now aimed at reconciling information rather than providing insights. A cloud-based project management solution was implemented for part of the team, but it didn't solve the issue.



At a glance

Customer

Ouranos is the innovation cluster and consultation forum enabling Quebec society to better adapt to climate change.

Business Need

Ouranos needed to track projects with multiple funding sources. This feature is not available in most PM systems.

Solution

Ouranos combined a custom expense management software with]po[, implementing both non-standard accounting and classical project planning and tracking.

Results

Project status is available to stakeholders on-line; financial allocation of efforts is tracked and easy to audit.

PROJECT]open[

“Open source solutions like]po[provide tremendous flexibility that must be leveraged by organizations to grow.”

Dominique Lenoir
Managing Director of Metamorphose

The Solution

During fiscal year 2021, Ouranos deployed]project-open[in conjunction with a custom-built multi-fund cost-tracking and allocation system. The open-source nature of]po[made the integration easier and allowed the team to add customization that simplified everyone’s work. The integration of both applications was designed to meet the specific purpose and will evolve as Ouranos’ needs do.

Selection Process

After using a cloud-based project management system for over three years, Metamorphose and Ouranos’ team reassessed the situation. Requirements were documented and revolved around:

- Timesheets and effort tracking;
- Capacity planning;
- Tracking of expenses and external contracts (critical, since around 75% of projects coordinated by Ouranos are delivered by external scientists);
- Multi-fund financing and the capacity to aggregate information by fund;
- Capacity to extract custom information as needed;
- Ease of administration;
- A very limited budget.

The team evaluated fifteen solutions, mostly cloud-based. Many of those solutions had very nice interfaces but fell short on functionality or their capacity for custom reporting. The multi-fund issue was proving to be the showstopper in all cases. It was then decided to split the solution to work around that problem. Open source thus became a key differentiator to permit custom integration and evolution of the interfaces over time.

The Implementation Project

The installation of]po[was quick and simple. A virtual machine was configured in under a day and validation tests quickly started. The configuration was performed by a team of three people with no previous knowledge of]po[and an external consultant with experience with corporate software solutions.

When the system was ready, a small team of volunteers used it for a complete quarter, to soften the edges and adjust the configuration.

Although most of the needs were met through]po[’s extensive parameterization, some small code changes were needed. For example, reports and screens were showing activities, but not the “top project” code. With 12 lines of code, we could add the new functionality.

Furthermore, even though Ouranos is using the free community edition, the]po[team was very responsive in answering questions on the configuration and correcting issues affecting the software. As regular paying customers of commercial cloud-based applications, we were happily surprised.

Implementation Highlight

]project-open[provides real-time visibility on efforts spent by project and activity. Financial allocation of work is greatly improved, traceable and better structured, and there’s better overview of projects throughout their whole lifecycle, rather than only the current year.

Key Modules Used

- ▶]po[Project Planning (Gantt Editor)
- ▶]po[Task Management
- ▶]po[Project Tracking and status reporting
- ▶]po[Resource Management
- ▶]po[Timesheet Management with approval workflows
- ▶]po[Capacity Planning

Business Results

Despite the fact that]project-open[offers a user interface that “makes SAP look sexy” and some push-back was expected from the users, the solution was very well received by Ouranos’ team.

A handful of custom reports were requested and have been developed and, in some aspects, the usage of the system has already evolved beyond the original scope. For example, the milestone functionality is now used to provide a dashboard of the scientific and financial reports required by the financiers.

Within a month of running the system, we could extract reliable information and have a clear vision of efforts and advancement.

Other results include:

- ▶ Quicker compilation of time for financial allocation;
- ▶ Simulation of the capacity of resources is available;
- ▶ Time tracking is now aligned with project deliverables.

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