

A large orange semi-circle graphic on the left side of the page, with three horizontal lines (orange, cyan, and lime green) extending from its left edge. A vertical lime green line extends downwards from the bottom of the semi-circle.

Case Study  
IDBS

## Global roll-out of SharePoint and Microsoft EPM integration gives IDBS significantly enhanced visibility and efficiency.

In the face of increasing regulatory demands and an amplified commercial drive to improve productivity, the scientific research industries have embraced an array of new technologies. One supplier at the forefront of this progressive market place is IDBS, an advanced software solutions organisation that provides specialised scientific data management software to life sciences and other research companies, for the capture and analysis of complex chemical, biological and manufacturing research data, the secure management of intellectual property and a platform for scientific data exchange.

Founded in 1989, IDBS is a privately owned company with over 178 staff based across Europe, the USA and Asia with the head office located in Guildford, UK. IDBS is an industry-leading provider of data management software applications designed to allow scientists to easily access, visualise and analyse information, communicate data consistently and process information faster and more accurately. IDBS' customer base of more than 200 organisations around the globe requires the company to be active in complex worldwide projects, tracking progress and tasks across a broad spectrum of project activities.

As experts in enabling other organisations to make the right information available to the right people at the right time, IDBS undertook an internal review of their own data administration structure which highlighted a requirement for a more consolidated approach to information and resource management.



## ***Innovation in Research Data Management***

David Longman, Programme Manager at IDBS, explains the trigger point for the implementation project:

*'We had an existing project in the pipeline to migrate our email infrastructure from Lotus Notes to Microsoft Exchange and as part of this migration we had a requirement to replace a number of in-house developed Lotus Notes databases. We were also using Domino.Doc as our corporate document management system globally but were having performance issues when accessing from our US offices.'*

With no remote access to Domino.Doc, users were required to VPN into the corporate network to access documents. IDBS decided to remove the need for a Domino server which meant that the Domino.Doc and the in-house Lotus Notes databases would also need to be replaced.

After a series of requirement discussions, two technology solutions stood out as obvious choices to meet the project objectives; Microsoft Office SharePoint Server (MOSS) and Microsoft Enterprise Project Management (EPM).

The integration of these two leading-edge technologies would provide a sound platform for IDBS to centralise and manage documents and resources across the whole organisation globally. MOSS covered 80% of IDBS' needs out-of-the-box and certain teams within the organisation had already been using SharePoint 2003, so there was some familiarity in place. MOSS would be implemented to provide a consolidated document management system and would also replace IDBS' existing intranet which was underutilised as it had to be updated by someone who could write HTML.

As existing Microsoft Office Project users, IDBS selected the Microsoft EPM solution to enable quick, clear-cut views of cross-project dependencies (both timeline and resource constraints) and to provide the required central resource pool.

The objectives of the implementation project were to:

- To replace Domino.Doc as a document management system.
- To create an easy to manage intranet for information sharing which did not require users to know about web development
- To create a single portal which pulls together customer data from multiple systems
- To provide a central resource pool for project team members and to show the dependencies between multiple projects.

An implementation partner was chosen to assist IDBS with both the MOSS and EPM expertise required to implement the new system.

David Longman comments;

*'Corporate Project Solutions were chosen to partner with us as they were flexible enough to work in the way we wanted to. We planned to implement most of the solution ourselves and bring in the experts for the parts where we required additional skills.. CPS were happy to assist us in this and we have been really happy with the results.'*

The implementation fell into three key initiatives and involved the integration of three separate SQL Server databases using the Business Data Catalog (BDC). The creation of the MOSS intranet portals formed the basis of the project with elements of Microsoft EPM integrated and separate team sites constructed to meet the initial project objectives.

Key implementation initiatives:

### **GPS**

The creation of a Professional Services site that linked project information from another database (via the BDC) with a central document library and lists for risks, issues and tasks. Following this a dynamic project page which automatically filtered this data to show only relevant information for the selected projects was set-up. Custom event handlers were written by CPS to ensure that uploaded documents were consistently stored in an easy-to-navigate folder structure within the document library, ensuring users can sync specific projects with Microsoft Outlook easily. The event handlers also allow users to easily access documents from Windows Explorer by navigating through SharePoint, providing multiple ways to access crucial document data.

## Customers

The development of a Customer site which linked CRM data from SalesLogix, Helpdesk data from SupportWorks and project information from Tenrox (all via the BDC) with documentation stored within MOSS. This functionality allows IDBS to have a single page for each customer showing all relevant information from across the organisation in one central location. IDBS consultants can now quickly and efficiently get all the essential information they require prior to an onsite visit from one location. A replacement for a Lotus Notes database was also implemented which can track software dispatches to customers using InfoPath.

## Development Projects

IDBS chose to create MOSS project sites rather than using the standard Microsoft EPM project sites because it made the intranet much more maintainable and enabled the team to link development projects to other areas of the site quickly. All IDBS project plans are stored within EPM and on each project site, Project Centre webparts were added to enable users to quickly see the status of the projects. The custom project site template also contains a custom list with BDC columns to define and track the SupportWorks (Helpdesk) tickets scheduled for inclusion within specific projects.

The implementation of these initiatives involved the project manager, David Longman and Corporate Project Solutions (CPS) who delivered the initial set-up and created some of the complex custom pages, bespoke event handlers and InfoPath forms plus 5-10 people across the business teams who created their own team sites and uploaded their data. The solution as a whole has now been implemented globally to approximately 180 users. For the Microsoft EPM elements, the entire project team accounted for almost 90 people. (12 project managers, the rest were team members.)

Commenting on the current project status, Longman explains;

*'The implementation is still ongoing. I don't think we'll ever end as we are constantly finding ways to bring wider business benefit with additional functionality. So far this project has been running for around 6 months from the initial scoping phase with CPS. We have successfully rolled out to the entire organisation.'*

The main benefit of the implementation for IDBS has been the ease with which the teams can now access their data internationally. By using the BDC to pull data into one place from the now integrated internal systems, employees can quickly see what data is available. The data is now easily searchable using the standard MOSS search features and the configuration of the system enables users to access data remotely without using a VPN which is really useful for the non-office based teams. The system performance across the Atlantic has also proved to be far superior to the previous Lotus Notes access.

For the IDBS Development Projects, creating a portal for all project-related information has proved significant. Having all information in a central repository has made it extremely simple to track the status and cross-dependencies of all the projects in the portfolio.

The only negative point arising from the initial implementation related to the all encompassing scale of MOSS which often meant understanding the exact capabilities from the outset proved difficult. As Longman clarifies;

*'This was not always a negative because it highlighted areas in our process that could be improved and this has allowed to us to further streamline our project delivery.'*

Development continues on the new infrastructure with future plans involving the implementation of more complex workflow and reporting solutions on the IDBS Development Projects to aid internal auditing, styling the intranet to follow a consistent look and feel, investigation into how to utilise the KPI and Excel Services functionality more extensively, better integration with other LOB systems and the possibility of updating idbs.com to become a MOSS site.

Streamlining information and resources with the integration of MOSS and Microsoft EPM has enabled IDBS to make vital data available in a consolidated, easy-to-use format that has been adopted internationally by the whole organisation. As work continues on the system, the visibility created will improve productivity, increase efficiency and ultimately reduce costs; all vital, extremely desirable attributes in any business environment; especially in today's marketplace.



Corporate Project Solutions  
Regal House, 4 Station Road  
Marlow, Bucks SL7 1NZ

t 01628 895600

f 01628 895601

e [solutions@cps.co.uk](mailto:solutions@cps.co.uk)

[cps.co.uk](http://cps.co.uk)