Fluent Books

ivari migrates PWA, project and historical data from Microsoft Project Server to Project Online

ivari chooses FluentBooks for Microsoft Project Server to Project Online migration

User background

For more than 80 years, ivari, supported by a national network of thousands of independent advisors, provides a full range of insurance products designed to help Canadians make the right choice for their protection needs.

ivari decided to switch from Microsoft Project Server to Project Online and, as a result, needed to migrate all project data to cloud.

Unlike the company's parent and sister organizations who employ dedicated Project Managers, ivari maintains a Project Management Office (PMO) with one project portfolio. This allows ivari to manage 20 to 30 projects at any given time. Alongside three production sites, ivari also run two test sites, allowing its PMO to test and try new updates and enhancements before deployment to production.

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Project description

When ivari needed to migrate its data from Microsoft Project Server 2010 to Project Online, its team sought a solution to ensure its success.

Moving from Microsoft Project Server to Project Online is a complex task which can be managed in three ways:

• Manual migration
This method requires a team of engineers to recreate the PWA configuration in Project Online manually. Projects must be saved manually before being published to the new PWA. Importantly, some data, including customized task fields, is not stored within those files, so manual population within the Project Online PWA is necessary to ensure its success.

• Third-party migration solution
Third-party solutions, such as FluentBooks from FluentPro, allow organizations to automate their migration process. FluentBooks, for example, supports the migration of PWA configurations, as well as SharePoint data, projects data and historical timesheets data. Designed to minimize the necessity of manual work – and the risks associated with it, FluentBooks automates migration and validation of custom fields, lookups, security, resource pool and other configuration settings, as well as project data.

• Migration as a service
Experts, such as FluentPro Migration Team, have the knowledge and experience to migrate Project Online PWA data in the most efficient way. FluentPro skilled engineers have already helped thousands of organizations to successfully manage their configuration, migration, and data administration needs.

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ivari chose FluentBooks from FluentPro for its migration needs, in addition to FluentPro G.A. Suite for its backup needs.

FluentPro FluentBooks meets the needs of organizations, such as ivari, by migrating Project Server 2010 data to Project Online. The upgrade features two phases, the first of which is migration to development / test farm verification. This is followed by migration to the production farm

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Feature focus

A perfect choice as a solution for accurate migration, FluentBooks is packed with automated features engineered to help organizations work more efficiently.

As well as helping users migrate the most important and time-consuming configuration settings and data, FluentBooks includes PWA comparison feature. It ensures PMOs and PPM administrators to identify issues early on and migrate missing data then.

Along with command line parameters for the easiest migration automation, FluentBooks supports administration and change management features. It enables configuration audits, documentation, bulk edits, and more.

However, ivari's team are most impressed by the software's time-saving bulk working capabilities, according to Senior PMO administrator Steve Miljanov.

"My two most often used features are the 'Resources Bulk Edit' and the 'Publish Projects'.

"Microsoft made some changes a couple of years back, which made managing resources a challenge. But the 'Resources Bulk Edit' allows me to modify resources removed or disabled from the Active Directory more easily… ensuring our IT Security protocols are maintained."

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Values delivered:

Choosing FluentPro FluentBooks allowed ivari to achieve its goals and realize a raft of benefits, including:

- Successful migration of source PWA data, including all configurations, projects, project sites from Microsoft Project Server 2010 to Project Online.
- Significant reduction in manual PWA configuration management and administration.
- Fewer errors during migration, due to complete automation of migration processes.
- Less time spent on bulk edit operations.
- Easy identification of potential errors prior to actual migration.
- Encryption meets the latest TLS protocols for confident IT security.

Client feedback:

"Things always change in any organization and FluentBooks allows me to keep our PWAs humming along nicely…

"Its strength is its ability to pull data from our PWA Instances to reveal issues and information that we would not normally see.

"Our productivity is greatly improved…Without FluentBooks, some of the operations I perform would not be possible otherwise, so the tool is a lifesaver."

Steve Miljanov
Senior PMO Administrator,
ivari

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Fluent
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About FluentPro Software Corporation

FluentPro is a US-based corporation helping organizations simplify and automate migration, implementation, configuration management, data protection, and integration of the Microsoft PPM solutions.

Since 2010, more than 500 leading enterprises use software products from FluentPro to effectively manage their Microsoft PPM Platform solutions, including Microsoft Project Online, Project for the Web, Microsoft Project Server, and Power Platform.

The company provides software and services to some of the largest businesses in the world, including Microsoft, NBC Universal, Good Year, Abbott, BOSE, Valeo, CyberPort, and Gulfstream.

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FluentPro Software Corporation

FluentPro offers solutions for migration, disaster recovery/backup, configuration management, administration, business intelligence:

• FluentBooks
Helps PWA administrators and consultants with migration and configuration management activities in Microsoft Project Online and Project Server.

• G.A. Suite
Provides tools to backup/restore/archive data, manage Microsoft Project Online configuration lifecycle, and implement governance policies.

• FluentPro Backup
Provides tools to backup/restore/archive data, manage Microsoft Project Online configuration lifecycle, and implement governance policies.

• Project Migrator
Provides an automatic migration between project management systems like Microsoft Project for the Web, Project Online, Monday.com, Trello, Asana, Office 365 Planner, Smartsheet, and Dynamics Project Operations.

• Integration Hub
Integrates Microsoft Project Online and third-party agile platforms, such as JIRA Software, Azure DevOps, Microsoft Office 365 Planner, and ServiceNow.

• DataMart
Provides organizations with the advanced business intelligence, analytics, executive reporting, trend analysis, and data visualization they need to make data-driven decisions.

To learn more about other FluentPro products or request a demo, please contact the FluentPro Sales Team: sales@fluentpro.com.

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