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Get Connected

collabro-legare.com
Overview

Legare is a solution that focuses on the issues facing Primavera EPPM users around data extraction, transformation and loading (ETL) in the enterprise environment.

It serves as a fast and simple link between Primavera and Enterprise Asset Management (EAM) and Enterprise Resource Planning (ERP) systems such as SAP, Oracle, IFS, Maximo and Sun Accounts, by facilitating the exchange of data within the Planning, Maintenance and Finance environments.

Legare is modular, and in its basic form, provides a desktop-based productivity tool for Planning Engineers wishing to extract selective planning data from Primavera into MS Excel, and re-import back into Primavera.
Overview

The base product also allows planning information to be shared across departments and other organisations that may not have access to Primavera.

As an organisation’s requirements mature, Legare’s modular approach protects the user’s investment, with the addition of further features such as the Scheduler, providing the automation of regular data exchange tasks. Additional connectors offer integration with further data sources, all of which lead to an enterprise-wide Primavera integration solution and Planning Engineer’s productivity tool – making Legare the preferred choice for all integrated planning challenges.

“Collabro employs an agile software development methodology, which provides a mechanism for new features to be deployed rapidly whilst maintaining the highest levels of quality.”

Kevin Walker
Product Manager
Collabro
Functionality

Legare provides a mechanism to easily manage the complexities of import, export and integration tasks in a multi-project environment through an intuitive user interface, designed with early adoption and minimal user training in mind.

Primavera’s data objects are exposed through a number of simplistic dropdown lists, allowing non-experts to create simple data mappings in seconds, whilst avoiding costly software engineering support.

Data transformations may be described during the mapping process, allowing simple or complex transformations to take place within Legare. Activity data may be optionally filtered and sorted, while configurations may be saved and recalled for future use by users or the Scheduler module. Network logic is maintained bi-directionally through the use of the optional Relationship module.

Collabro is continuing to build upon an established network of resellers across the globe. Each of our partners, as a minimum, has a specialisation in Oracle Primavera.

Martin Slowey
International Business Development Manager
Collabro
Connectors

Connectors offer users the opportunity to extend Legare’s functionality to communicate with multiple data sources, including MS Excel, XER, Oracle, MS SQL Server, MS Access and MS Project. New connectors are continuously being developed and added to the Legare product portfolio, offering customers a mechanism to future proof their investment.

Forecaster

The Forecaster takes seed activities from a data source, such as Maintenance Routines in an asset management system, and creates forward projected activities in Primavera. This avoids having to create ghost activities in the source database in order to forecast activities over a set period of time. This can be particularly useful if Planning / Costs departments wish to establish cost, resource and material requirements for an asset over a projected window of time, which can be vital to decision making on large turnarounds / shutdowns.

“We’re very proud of the fact that the design of the Legare user interface has resulted in a swift user adoption process. Whilst user training is necessary, the requirement is minimal.”

Alistair Punt
Facilitation & Training Manager
Collabro
Dictionary

The Dictionary module offers a mechanism to maintain integrity of Primavera’s Resource and Code dictionaries. All too often users experience unwanted Dictionary updates whilst importing data from XER files through the standard Primavera import function, which can create unwanted Resource and Code values in the Primavera Dictionary. Legare’s Dictionary module avoids the time consuming creation of unwanted resource/code values and optionally offers the ability to transform resource/code values into the correct IDs prior to data being imported into Primavera. This module also negates the need for Primavera users to run global changes in a test environment prior to loading their data into a production environment, consequently providing significant cost savings through reduced administrative tasks for Planning Engineers.

“Legare serves all of the main vertical markets extremely well, including Oil & Gas, Petrochemicals, Defense, Construction, Utilities and Pharmaceuticals - all of the key markets where you would expect to find Primavera.”

Gwen Moran
Operations Manager
Collabro
**Scheduler**

The **Scheduler** permits previously generated Configuration Templates to be executed in an unmanned environment. Legare tasks may be stacked and dependencies may be set, ensuring that stacked tasks may only be executed on the successful completion of previous tasks run by the Scheduler. For example, a Dictionary update task may be related to an Activity update task, where the Activity update is not permitted to run if the Dictionary update fails. Designated users also receive email reports of the run status of individual or all tasks, keeping end users informed of the status of all unmanned operations via Legare.

**Configuration Database**

The **Configuration Database** provides a repository for storing and controlling access to critical import, export and integration tasks. Users may access and run configuration tasks stored in the configuration database, but may not necessarily be permitted to change or alter the core behaviour of these tasks – this can be controlled by a super user. The Scheduler module also makes use of the Configuration Database, ensuring all automated tasks are accessible to the automation engine.

"Collabro has considerable experience in supporting other enterprise systems in its portfolio, across many different time zones, so we found creating a new support template for Legare pretty straight forward."

Dave Boyne
Product Support Analyst
Collabro
Security and Integrity

Security and Integrity is maintained to a high level throughout Legare, where all activity to and from the Primavera database takes place via the Primavera API. Access to objects and fields in the Primavera database are controlled at user level, where a user is required to supply their Primavera login credentials before being permitted to carry out any task in Legare. It has been widely accepted that the Primavera API applies a greater level of security and data integrity against the Primavera database than that imposed by the standard Primavera user interface, which leads to greater levels of integrity being maintained on all integration tasks through the adoption of Legare.

“We are noticing an increasing number of customer deployments are becoming more and more complex. I never fail to be impressed with how flexible and adaptable Legare is proving to be as we implement the product into some very challenging environments.”

Paul Quinn
Implementation Manager
Collabro
### Scenarios

Whether you are looking for a solution to collect progress from internal departments, or external contractors – through to fully automated integration with your Finance and Maintenance systems, Legare provides a solution that offers the Planning Department an opportunity to create and easily maintain an integrated plan.

Legare is deployed across many different scenarios. Typically, three of the key areas where Legare is deployed include:

1. Internal Updates
2. External Updates
3. Enterprise Level Integration
Internal Updates

Collecting internal company progress updates in a quick and efficient manner is of paramount importance to any project. Rapid and frequent updates affect decision making on projects, and ensure costs and budgets are controlled rigorously.

Planning Engineers use Legare and the MS Excel connector to collect progress updates from internal departments in a cost efficient manner. Planners use Legare to selectively extract activity and resource information relevant to a particular Project Manager or Department, and export to an Excel file. The Excel file is distributed and updated accordingly, and returned to the Planning Department, where Legare is used to re-import the updated information into Primavera.

Creation and re-importing of the Excel file is tightly controlled through the use of export/import templates, which are easily created and maintained by the organisation.

The benefits of using Legare in this environment are considerable, focussing around accelerating the update process and maximising the organisation’s investment in Primavera. Legare also provides an effective tool to facilitate and maintain an integrated work plan, whilst reducing the need for Planning Professionals to be involved in import-related administrative functions. This is achieved whilst maintaining the highest level of integrity in the Primavera database.
As an organisation outsources complex programmes of work to one or many contractors, it becomes vital for the client to maintain an accurate top down view of all project activity. For those organisations not wishing to provide contractors direct access to their Primavera database, one of the few options left is to collect updates through the exchange of Primavera XER files. This method comes with a multitude of issues, which inevitably lead to Planners importing XER files into a non-production environment, applying global changes then re-importing the data into a production environment. This process creates a significant amount of effort for Planning Engineers, with no guaranteed consistency in the results.

Whilst Legare's base functionality applies, the XER connector extends functionality to import XER files. Legare effectively treats the XER file as it would any other data source. Filters may be created and sort criteria applied, whilst more sophisticated and complex data transformation services may be included in the configuration template, negating the need for global changes to be applied in Primavera. Indeed, once a configuration template has been created and tested, it may be run direct into a production version of Primavera.

The optional Dictionary module may be used to ensure Primavera's Dictionaries, such as Resource IDs and Code Values are managed in a controlled manner, and not necessarily created as per Primavera's default behaviour.
Enterprise Level Integration

Legare’s base functionality may be extended significantly to provide enterprise-wide integration.

Legare’s connector technology extends the base product to provide connectivity with most common ERP and EAM systems, such as SAP, Oracle, Maximo and IFS. Configuration templates previously created by end users may be published to Legare’s Configuration Database and executed in a scheduled and unmanned environment.

The Relationship module maintains network logic on inbound and outbound processes, whilst the Forecaster forward creates activities, such as maintenance tasks, in Primavera, without the need to flood the asset management system with ghost work orders.

This, along with the features that support internal and external updates, provides a cost-effective and fully-integrated approach to planning in the corporate environment.
Partners

Collabro is continuing to build upon an established network of resellers across the globe. Each of our partners, as a minimum, has a specialisation in Oracle Primavera EPPM. Beyond this, they also have extensive knowledge of each of the vertical markets Legare is suited to, as well as trusted relationships with their customers. They understand the complex challenges faced by our customers.

Click on a location for contact details.
## Partners - UK

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<thead>
<tr>
<th>Milestone</th>
<th>ForgeTrack Limited</th>
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<tbody>
<tr>
<td>Westgate House</td>
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<tr>
<td>Westgate</td>
<td>St Andrew Street</td>
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<td>London W5 1YY</td>
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<td>E: <a href="mailto:info@milestoneuk.com">info@milestoneuk.com</a></td>
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**OVERVIEW**

**FUNCTIONALITY**

**SCENARIOS**

**PARTNERS**

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Collabro

Collabro was formed in the UK as a limited company in 2004, the result of a management buyout from LOGIC, a not for profit organisation set up by the UK Oil & Gas industry to manage cross-industry supply-chain collaboration and competitiveness. Since its inception, the company has expanded its services and product portfolio. It manages Vantage POB, the global industry solution for managing personnel on-board, has a world-class Facilitation service used by many blue chip organisations globally, and more recently added Legare to its growing list of capabilities.

Key Personnel

Chairman ................................................. Clive Fowler
UK Managing Director ......................... Janice Grant Shaw
Asia Pacific Managing Director ............. Tom Kennedy
Non-Executive Director ....................... Mick Longton
International Business Development Manager ...... Martin Slowey
Product Manager .............................. Kevin Walker
Operations Manager ......................... Gwen Moran
Facilitation & Training Manager ............. Alistair Punt

"Legare satisfies a demand in the market for a high end integration tool, which can easily be scaled down to meet the needs of day-to-day planning operations. This is a product that spans and resolves a broad range of issues in a very cost effective way, with a very rapid return on investment.

Janice Grant Shaw
UK Managing Director
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