Chapter 7

Better Together: Microsoft Project 2010 Worksites Using SharePoint Server 2010

In This Chapter

This chapter highlights some of the features available with Project Server 2010 in a SharePoint collaborative environment. The ability for the project teams to communicate and centralize information has rapidly expanded the adoption of SharePoint even without project or portfolio tools.

Project Server 2010 is the only enterprise application created in SharePoint that leverages not only project, program, and portfolio management capabilities but also the full spectrum of collaboration and reporting that SharePoint brings.

What You Will Learn

* Project Server 2010 integrates the increase in social communication, simplification, and centralization of information, enabling faster viewing and getting to the right information.
* Project management (PM) practitioners have a significant advantage with the PPM 2010 product due to the availability of tailored views, ribbons, and easily accessible, modifiable content search and reporting.
* Project communications and project-related information is dynamically linked and geared for better social integration with reading, responding, and managing.
* Automation and workflows no longer require deep programming knowledge.

Integration of Collaboration, Social Media, and Project-Related Information

Up to this point, we have focused on “what’s in it for me” with regard to a PPM environment’s key stakeholders’ relationship to supporting tool capabilities such as enterprise project types (EPTs), workflows, reports, actuals versus estimates, program/project/task interdependencies and relationships, and resource capacity planning. Now we set our sights on the one aspect that cannot be ignored but is the most challenging to manage: people. More specifically, we focus on managing people’s behavior.

If we think about social media and the growth of multiple ways to accomplish the same activity, we can see that there is a significant drive to allow flexibility in managing work or work tasks. People who are responsible for doing an assignment (e.g., those who test a part and document the results) may perform the task differently from their colleagues. By allowing for flexibility and making use of multiple avenues to perform work (SharePoint Lists, My Tasks, timesheets to progress activities [AU: Word choice? “progressing” activities?]in Outlook or MS Project), we enable a wider audience and organizational culture to take advantage of the full Microsoft stack (the wider offering of multiple Microsoft products).[AU: Is “stack” in this context a term readers will know?]

Social media is more than a craze or fad; it is a new way to leverage information for business purposes. Imagine predicting that one of your team will be out of the office next week, because you saw a travel update on Twitter. As a project manager, you could subscribe to Really Simple Syndication (RSS) feeds from project-related blogs and stream them right into your SharePoint Workspace, where you can share and exchange the information among team members. Being able to capture the behavior of resources opens the door to a whole new set of data and the ability to collect and manipulate that data for extensible information.

When SharePoint is used in a PPM environment, alerts help to tell the story, and other included media (pictures, charts, discussions, etc.) illustrate and articulate the evolving situation. Additionally, geospatial tracking, tagging, ratings, “I like it” sentiments, and others are now critical pieces of insight that fill in the blanks. Think of these forms of metadata or visual cues like irrational numbers in the math world. They are values that exist but cannot be expressed rationally. Human emotions, actions, and gestures communicate a significant amount to any environment. Project managers for the most part agree that communication is one of the more important components in a PM environment, and communication is defined as both verbal and nonverbal. Poker players read their competition by looking for the nonverbal cues, or tells, that may give them just enough insight to make an informed decision. Together, SharePoint and Project offer tells to decision makers related to the health, progress, status, and future of their PPM environment.

Consider the wealth of honest, open conversations that happen among employees in any given day at the water cooler. While a lot of it may be of a personal nature, the work- and project-related bits are of a very high quality. The second that conversation ends, that information dies on the vine, and its value ceases to exist. By leveraging the power and familiarity people have with social networking, you can collect, store, and use this high-quality, relevant information to further the project and eventually the business.

As organizations begin to realize the benefits of a fully networked environment, more and more methodologies and systems will become integrated. As the lines that used to define a nonnetworked legacy approach continue to fade, exceptional instances of these seamless integrations rise to the top of the pack and become evident.

Such is the case of pairing SharePoint and Project Server. Project Server 2010 combines the power of both technologies to provide a powerful solution that effectively manages project, operational, development, and all other types of work in an organization. Project Server 2010 leverages SharePoint Server capabilities including workspaces, forms, Excel Services, social networking, workflows, enterprise search, and more to meet customers’ unique requirements. A common and familiar platform for both Project Server 2010 and SharePoint 2010 will help organizations get more value for their investment, streamline operations, save money, and have direct impact to business results.

Project Management as Practitioners Want It

Managing projects, information, and stakeholder objectives is complex, and complexity elevates risk, which threatens project delivery and the ability to meet strategic objectives. Complexity also elevates opportunity. Project 2010 democratizes PM by enabling individuals in teams of all sizes to quickly plan, manage, and deliver work on time and on budget. It brings the ease of use from Excel to the Project platform to connect to these broader PM audiences[AU: to this point “PM” has been used exclusively for project management, not project managers; please ensure consistency]. Project Professional connects to two servers to facilitate teams to collaborate around work. The first connection is to the SharePoint server tasks list which allows project managers to publish their plans where their project team lives and then automate status collection through distributed task lists. The other server connection is to Project Server 2010, which provides for a unified PPM solution. (See Figure 7.1.)

Figure 7.1 Project Server 2010 Part of SharePoint Server 2010 Universe [07-01-projectServer2010PartOfSharePointServer2010Universe.ai]

Source: Advisicon

The gap between these two business elements (project and portfolio management) was long considered to be insurmountable. Now Project Server 2010 offers an integrated and efficient solution. (See Figure 7.2.)

Figure 7.2 Opportunity Translates to Business Results [07-02-opportunityTranslatesToBusinessResults.eps]

Source: Advisicon

Dynamic Worksites and Collaborative Workspace

Now, within the SharePoint Server environment and along with creating project sites, any user can create workspaces for project team collaboration. A workspace is contained within the Project Site and allows the team to work together on a document (e.g., project charter, communication plan, etc.). There are also meeting workspaces that store meeting minutes, agendas, and calendars and can record meeting decisions. These workspaces allow for a “conference room” within Project Sites where collaboration is more focused on a particular document or meeting.

This degree of collaboration-heavy features plays into the earlier points of capturing the living information from the team that can be lost in traditional water-cooler discussions. Project sites aim to provide all natural discussion tools a project manager could ask for in a single, one-stop experience for the team.

These workspaces are governed by the permissions granted to team members. For example, the project manager may have formed a core team to discuss and collaborate on the project charter prior to releasing it team-wide. Through permissions, only the core team may have access to this workspace. This control is crucial to managing work and team stakeholders efficiently.

Project Team Discussion

Discussion boards provide a forum for conversing about topics that interest your team. For example, you could create a discussion board for team members to suggest activities. Team communication and discussion is the key to project success. Discussion boards allow project team members and project stakeholders to discuss open-ended issues and proposals, give feedback, and ensure a smooth flow of communication at all levels. They are a good way to manage escalation and team interaction. And since the discussion board is housed within the Project Site, the communication is captured as a historical project asset.

Discussion boards can be set up using SharePoint 2010 to share and discuss topics. The discussion board shows the most recent discussion first, as well as the number of replies for each discussion. That way, you can quickly see which discussions have the most recent activity and which ones are the most popular. Members can also customize their own views of discussion boards. Participants can even add items to discussion boards from their e-mail application, making participation as easy as sending an e-mail. Multiple participation venues (through the intranet, Web, or e-mail) also widen the audience, as people can contribute remotely. So whether team members are in the office or in the field, participants have an easy way to contribute content.

Discussion comments can be displayed in either a flat or threaded view. Flat view displays all comments in the order in which they were created. Threaded view lets users view comments by conversation. The discussion groups are organized by topic. Anyone can post a message to a discussion, and multiple people can respond in a free-form manner. The following graphic showcases an example of a discussion WebPart, very commonly used on Project sites to help showcase frequently asked questions or posed questions with answers.[AU: insert text ref. to figure]

Figure 7.3 SharePoint Server 2010 Discussion Example [07-03-sharePointServer2010DiscussionExample.tif]

Source: Advisicon

SharePoint Server 2010 Offers Critical Business Capabilities

Project Server has really opened the door for business functionality to be driven to a single portal.

Later in this book, chapters 8, 9 and 10[AU: specify where], we review some of the dashboard and business intelligence (BI) capabilities. However, some of the immediate critical needs are the day-to-day activities of project team members, managers, and other stakeholders within the project/program environment.

Things like searching and having alerts and other key information driven to the stakeholders, without them having to manage or go and look, save countless hours and enable project teams to focus on exceptions or issues rather than having to manage and review all of the collaboration portal information surrounding a project or a portfolio of project information.

Search Capabilities Meeting Business User Needs

The search capabilities, as show in this next figure, are one of the most powerful features of Project Server and SharePoint. With proper setup, an organization can search across all projects and quickly locate key information, files and other important information.

[AU: insert text ref to figure]Figure 7.4 SharePoint Server 2010 Contextual Search [07-04-sharePointServer2010ContextualSearch.tif]

Source: Advisicon

Searching for key information can be a nightmare on a file share. For project team members, searching within Project Server is simplified and mimics how users search within a Web browser. As Project Server is based on SharePoint, it supports several types of search. Users can use the Search box on each page of a site or on the Search Center site, or create a detailed query by using the Advanced Search page. Users can look for content by searching for keywords, a specific phrase enclosed in quotation marks, or by values that are assigned to properties.

When users are looking for content but are not sure where it is located, they can start their search at the highest site SharePoint site (parent site) where they think the information might reside. Then refine the results to find the information. Users can look for content by entering keywords or a specific phrase enclosed in quotation marks.

If a more specific query is needed, users may want to use the advanced search page, which is available from the search results page. By using advanced search, users can choose to display or exclude results that include certain words, filter search results by language or type, and search on content properties. Thus, it is very easy to search for data on the site without wasting lots of time.

SharePoint 2001 supports these types of search:

* **Boolean** s**earch.** Users can use Boolean operators—AND, OR, NOT—to combine text and construct a meaningful query.
* **Wildcard search.** Search queries can now match a wildcard at the end of a text string. For instance, users can search for “tenn\*” and get results that have the word “tennis” in them.
* **Faceted search.** When a search query returns many results, the faceted search functionality displays a refinement panel on the left side of the screen. In the panel users can refine the results based on criteria such as result type, site, author, modified date, and tags.

Advanced Workflows without Needing Deep Programming Abilities

Project Server working as an application within SharePoint offers significant automation capabilities.

Workflows can be created easily and efficiently in Project Server. Many third-party tools are available to speed this process or are waiting to be deployed.

This section does not delve deeply into setup, configuration, and programming instructions for creating workflows. Rather, its aim is to help those who are contemplating automation of manual steps understand the overall capabilities of Project Server with SharePoint and what is possible with workflow automation.

The concept behind workflows reaches directly to a growing and maturing organization that wants to automate key steps, alerts, field updates, and the progress of schedules using workflows. A key step in getting the most from workflow automation in both Project Server and SharePoint is the process map. Identifying business and PPM processes lays the foundation for rapidly identifying areas that can be automated. This identification process will become a focal point and also a test case for any technical or development team to create workflows in either Project Server or SharePoint.

As this section suggests, you can get to simple and even complex workflows without having to build them yourself or become a .NET developer. (Being a techie or developer can be extremely useful for expanding what already exists, however.)

Project Server’s Solution Starter Kit comes with two workflows that have features and functionality that end users can edit or leverage for excellent automation and workflows. These are the Demand Management Dynamic and Demand Management Morphing workflows.

Project Server provides an out-of-the-box workflow named Sample Proposal Workflow that can be leveraged for the phases, stages, and other enterprise project types. This workflow is very easy to leverage and actually is a good demonstration as it includes all of the usual things you might see in such a process: validation, approval, selection, and so on.

Good interfaces for managing workflows can be created with InfoPath forms, which enables nondeveloper types straightforward and nontechnical interface creation abilities. (See Figure 7.5.)

Figure 7.5 InfoPath Workflow Example [07-05-infoPathWorkflow.tif]

Source: Advisicon

For those who are interested in going beyond the standard or canned workflows, you can edit these out-of-the-box workflows, which may be easier than trying to build them from scratch.

There are different options for creating or leveraging programmed or nonprogrammed workflows. The distinction between SharePoint (Project Workspace) workflows and the workflows within Project Server should be understood.

In general, to build new Project Server automated workflows, you would use Visual Studio. Some of the technical resources out there have already been doing SharePoint workflows, but since Project Server workflows are a bit more complex and there’s no graphical user interface, you don’t get to use SharePoint Designer with Project Server out of the box.

If you want to modify the workflow or create custom workflows, you are going the Visual Studio route. One option is to purchase a third-party tool. [Nintex Workflow for Project Server 2010](http://www.nintex.com/en-US/Products/Pages/NintexWorkflowForProjectServer2010.aspx) tool is a common one that many have found easy to use.

This is a great way to leverage workflows since it handles the approvals and also provides options that cover the workflow needs of most organizations at the beginning of the move to automation. It is good to note that as more advanced, branching workflows are needed moving to a Visual Studio or a programmed solution will become necessary. However, getting started and creating workflows with InfoPath is an excellent way to provide scalability to establishing growth of a PPM system.

The steps for associating an InfoPath form [AU: add noun? What’s “this”?]with a workflow are:

1. Once it is installed, go to the location—e.g., to http://server\_name/pwa\_name/\_layouts/WrkSetng.aspx) on your server.

2. Click Add a workflow.

3. Create a new workflow based on the DM DynamicWorkflow template.

4. Configure each of your phases/stages using all your precreated stages with your approval requirements, then submit to finish.

5. Now return to PWA and in Server Settings create or assign the newly created workflow to your ETP.

These five steps allow Project Server administrators or power users to take workflows and connect them with existing enterprise projects in a matter of minutes.

Note that automated Project Server workflows or more complex branching iterative loop reviews and the like typically are developed in Visual Studio with the .NET Framework 3.5 or higher. SharePoint workflows may also be done in SharePoint Designer, but these would be dedicated to SharePoint itself, not the programmability in Project Server’s Project Server Interface (PSI) engine.

When using Visual Studio, you can easily create a SharePoint solution package (.wsp file) for a Project Server workflow. Once a workflow is created, Visual Studio creates the Features and Package folders in the workflow project that contains the package definitions, files, and code used by the workflow. This next graphic illustrates the creating of a workflow example. [AU: add reference to figure]

Figure 7.6 Creating SharePoint Workflow Example [07-06-creatingSharePointWorkflowExample.tif]

Source: Advisicon

Using Windows Powershell, you can install and run the workflow packages. Note that any changes require that you restart a workflow to test it out, especially if you are using a branching workflow. The following graphic shows the project server workflow list or package that can be referenced.[AU: add reference to figure]

Figure 7.7 Project Server Workflow List [07-07-projectServerWorkflowsList.tif]

Source: AdvisiconRemember that using Visual Studio 2010 to develop and debug Project Server workflows and other solutions for Project Web App requires development on a Project Server computer. In fact, for best practices, we recommend that you have a development, test, and production instance of Project Server.

Enough technical details. TechNet has many great examples and samples for the technical team to review and test for creating workflows. The Solution Development Kit has code samples and examples that can be deployed readily.

We hope that as you, the reader, review the options to move to automating workflows, you definitely consider these points:

1. Create a process map of the business process, inputs, and outputs.

2. Leverage the out-of-the-box existing workflows provided.

3. Review TechNet and other online references.

4. Utilize technical resources as you need them (developers), but don’t be afraid to tackle the connecting and automation of your business processes. Nothing ventured, nothing gained.

Leverage Integrated Communities to Build and Manage Knowledge Assets

Communication is a major success factor for any project, regardless of size or type. To enhance communication, the project team must function more like a community. SharePoint 2010 has made great strides in bringing the social computing elements to users in an easy-to-use format. This collaboration is key to project success and inherently develops the project team not only by using business knowledge about team members but by creating personal ties to enhance internal team relationships enterprise wide.

Many organizations, regardless of size or type, have different types of communities in terms of the work each group performs or areas the company has to develop. SharePoint allows organizations to create collaborative Web spaces for these communities to interact and improve understanding of the activities they are developing. In SharePoint, you can create surveys and link them to reporting tools, such as SQL services, Crystal Reports, and other business reporting products. All of these tools (which can connect to the data behind the scenes) can be integrated into SharePoint and Project Server and easily analyze, quantify, organize, and present the key trends or data elements customized to specific audiences.

SharePoint 2010 is the ultimate Swiss Army Knife for collaboration with smart connections between people and across teams. It enhances the set of collaboration and social networking tools for both organic and managed communities across your organization with the following features:

* **Collaborative content.** SharePoint 2010 offers improved blogs and wikis, calendars, discussions, tasks, contacts, pictures, video, and much more. With Office 2010, multiple people can simultaneously author content on a SharePoint site.
* **Social feedback and organization.** SharePoint 2010 enables involves organizing, finding, and staying connected to information and people through bookmarks, tagging and ratings, searching, navigation, profiles, feeds, and more. It combines informal social tagging with formal taxonomy so you can choose the right approach for a given set of content.
* **User profiles.** SharePoint 2010 enhances user profiles to reflect colleagues, interests, expertise, either via explicit tagging or recommendations based on Outlook and Office Communicator. The model is opt-in so users can manage what information is shared publicly. Users decide when an interest is something that they want to share or be asked about by others in the organization.
* **MySites.** MySites give quick access to your content, profile, and social network while continuing to let you customize, target, and personalize pages to the needs of different roles and users in your organization. The enhanced newsfeed helps track interests and colleagues.
* **People Connections.** SharePoint 2003 contained a universal person hyperlink and presence icon, so that you could always navigate to a user’s MySite, send e-mail, start an instant message, call, and the like. SharePoint 2010 enhances the user interface in conjunction with Outlook and Office Communicator. Also, colleague tracking and people search features have been greatly improved, with new algorithms and user experience leveraging expertise, social data, and more. In larger companies, organization chart browsing via the address book is one of the most popular features in Outlook.

Collecting Information from Multiple Sources

Surveys provide an efficient and cost-effective way to collect feedback on everything from how satisfied customers are with your product offerings to whether employees are satisfied with key result areas. Users can use surveys to ask team members what they think about issues, how to improve processes, and many other topics. Surveys yield the substance needed for future product, system, or process improvements and development. They enable you to present specific questions and collect the answers in an organized format, similar to a poll. Surveys can be implemented using SharePoint 2010. (See Figure 7.8.)

Figure 7.8 Example of Information Gathering [07-08-exampleOfInformationGathering.eps]

Source: Advisicon

SharePoint offers Web-based surveys that can be completed by anyone who has access to a Web browser; even mobile devices are supported. The responses can be named or anonymous, real-time results are available, and you can apply analysis tools. Results can be collected using several different types of questions, such as multiple choice, fill-in fields, and even ratings.

Depending on how a survey is set up, you may be able to respond to that survey only once. If you are the person creating the survey, you can add branching logic so that the survey changes according to responses to specific questions. In a survey that branches, questions appear only if they apply to someone's situation based on previous responses. If the questions don't apply, the survey skips that set of questions or the respondent is offered a different set of questions. The following graphic shows you the survey results from end users answering questions on the survey.[AU: add reference to figure]

Figure 7.9 SharePoint Server 2010 Survey Results Example [07-09-sharePointServer2010SurveyResultsExample.tif]

Source: Advisicon

After people respond to the survey, you will want to see the results, including any patterns visible. Surveys provide a graphical review of responses, similar to a chart, or you can export your results to another program, such as Microsoft Office Excel. Surveys also can provide individual responses or a list of responses.

Being Social in a Project Environment

Today’s project teams no longer work in the same building, floor, let alone the same region or continent. With the growth of cell phones and a more electronically connected workforce, the need for project teams to leverage the ability of social networking tools, concepts, and capabilities is increasing.

In 2009, a senior member of the Microsoft Project Marketing team asked a large group of Northwest stakeholders if they knew a good use for social networking tools. Many of these senior project, program, and portfolio managers really didn’t have a good response. Now, this senior marketing team member was being a bit coy, but if the managers’ sons or daughters were posed the same question, the response would have been very different.

Here we are, just a few years later, and the impact of socialization technology is everywhere. Different tools from blogs, networking sites, Twitter, Facebook, and LinkedIn surround the project community and those who are trying to communicate concepts, ideas, jobs, and marketing ideas.

Social Computing and Communication

SharePoint Server 2010 includes social computing tools, such as MySite Web sites, and social content technologies, such as blogs, wikis, and RSS. These features are built on a database of properties that integrates information about people from many kinds of business applications and directory services. You can adapt content to each user while enabling administrators to set policies to protect privacy. SharePoint 2010 introduces ready-for-prime-time social networking for the enterprise, with a rich feature set around social content, activity feeds, social and people search, and more.

Every team member can customize unique MySite pages. This page provides information about the team member, everything from their direct supervisor and subordinates, biography details, interests and skills, to contact information. It is a virtual address book. Metadata tags supply necessary data for searching. Now one member can look for a specific skill set or business acumen, and find someone possessing those skills internally.

The idea of communities is to bring the project team closer, enhance internal collaboration and cooperation, and streamline communication. It is also another tool for people to see what others are working on, what experience they possess, and how their skills can assist in projects.

Social computing also provides communication platforms for things such as a chat feature, which shows an employee’s status (e.g., whether in a meeting or not, or available to contact for assistance, etc.). There is also a posting feature similar to the postings seen on other social networking sights. Employees can post items to their walls and others can comment.

Developing camaraderie among team members enhances communication and helps gett teams through the forming and storming phases of team building and on to the more productive norming and ultimately performing phases much more quickly than before.

Business Users and Their Customized Pages

The ability for end users to move columns around in views as well as to hide columns from an existing view is one feature that end users find especially helpful.

While on the surface this ability may strike fear into the hearts of the PMO (which is trying to standardize or create a uniform look and feel for people working in Project Server), it actually isn’t that bad.

End users cannot turn on columns of data that they do not already have access to. The feature simply allows end users to drag and drop columns in the order that they prefer or to hide columns from a view that they personally may not find useful. A good example of this is when team members work on laptops. They don’t have a lot of real-estate space on their screens for viewing views, and they can hide columns or move the columns around to help them get to the key information they need. This doesn’t affect any other user and is localized to their log-in only.

This quick formatting allows team members and other stakeholders to manage the PPM views quickly and easily, without having to bring in the Project Server administrator to build new or customized views for them. After one migration from a 2007 PPM environment to a 2010 environment, the Project Server administrators were excited at how little they had to tweak and fine-tune views for end users. A little end user training saved the administrators hours weekly adjusting and helping adjust views for specific stakeholders. The end users were happier and so were the administrators, who now could focus on some of the BI and other new features enabled by PPM 2010.

Other components also allow business users to customize pages. When business users or stakeholders go to a project workspace or essentially a SharePoint site dedicated for a project, they also can custom tailor that page to their personal view.

Again, this doesn’t meant that they are able to add or change the SharePoint objects associated with that site; they just can hide or unclutter the page in order to help them see or get to the most important content they are looking for.

Many organizations choose to disable this ability, but the ones that provide a little training around this feature find that the stakeholders tend to prefer tuning the content for their viewing and/or relative to the size of their screen resolution.

What is nice about this feature is that with a click, business users can reset the page back to its original view or how it was updated by the Project site owner or SharePoint administrator.

Active Updating as Users Can Tag and Rate Content

Social tags enable users to tag and track the information they are most interested in. Users can also leave impromptu notes on profile pages of a MySite Web site or any SharePoint Server page. You can now tag any source on the Internet (or intranet) that has a URL. This tag is stored in your tags section on your MySite and also appears in your activity feed. Other users can post notes relating to your tag, which effectively creates a discussion board around the tagging activity, allowing conversations around something that has been tagged.

One of the key points of tagging is security trimming. Let’s take this example: What happens if you tag a document that someone else doesn't have access to? Social tagging uses the search index to provide security trimming on content that is stored in SharePoint. It enables senior managers to tag confidential documents, but those tags are not visible to anyone who doesn't have read access to those documents. [AU: insert text refs. to both figures] The next two examples illustrate the tagging or the adding of meta data to any SharePoint object so that it can be found via search or the web crawler search features enabled in SharePoint.

Figure 7.10 Project Server 2010 Tagging Using SharePoint [07-10-projectServer2010TaggingUsingSharePoint.tif]

Source: Advisicon

Figure 7.11 Project Server 2010 Tagging Notes Example [07-11-projectServer2010TaggingNotesExample.tif]

Source: Advisicon

On top of this is a Ratings feature, where users can rate content within SharePoint lists. Thus, SharePoint 2010 now has social feedback functionality, in that you can tag and rate content and other people can interact with that tag, creating a discussion. The following examples illustrate the ability to rate content. This will become more important as social media and new sorting, ranking and search features are being used by organizations. [AU: insert text refs. to both figures]

Figure 7.12 SharePoint Server 2010 Ratings Example: The Ribbon [07-12-sharePointServer2010RatingsExample\_part1.tif]

Source: Advisicon

Figure 7.13 SharePoint Server 2010 Ratings Example: The Menu [07-13-sharePointServer2010RatingsExample\_part2.tif]

Source: Advisicon

Creating Highly Connected Teams through Alerts and Notifications

A key component of both SharePoint and Project Server is the ability to notify end users of changes, updates to key documents, lists, or other important project related information. This helps to connect the user community to the information around projects, documentation, and key project collaboration. The ability to create pull process versus pushing or managing communication to different stakeholders can be easily managed from the Project Workspaces or SharePoint Project documentation. A project manager can manage and provide access to documents on a Web site, and interested stakeholders can be notified by e-mail when site content changes. This type of notification is called an alert. Alerts notify you of changes to documents, list items, document libraries, lists, surveys, or search results—helping you to be more effective by staying up to date with relevant information. If you have access to a SharePoint site, you can add, modify, and delete alerts from Microsoft Outlook. You can create alerts for lists and document libraries as well as for individual items and any files in them.

Alerts and reminders can also be set for changes made to task or status reports in Project Server. Each resource is able to configure the frequency of e-mail alerts and reminders for upcoming and overdue tasks; in addition, project managers can configure their resources’ e-mail reminders. In such cases, the project Manager’s settings override those set by the resource.

Important Concepts Covered inThis Chapter

This chapter’s emphasis was on the social and collaborative features that Project Server has in a SharePoint environment. The better-together story enables and empowers the project team to work at a higher and more productive rate, enhancing and centralizing communications.

Here are some of the key features highlighted and discussed in this chapter:

* Dynamic and Integrated SharePoint Workspaces help integrate key communications and documentation directly with the work being performed and the projects they fall in.
* Issues, risks, and documents are linked and dynamically connected so that team members or stakeholders are never more than one click away from information.
* Workflow capabilities empower end users who do not have to have a developer on hand to automate information or optimize activities.
* Workspaces can be customized for end users, helping to minimize IT dependence and allow end users more ownership of the collaboration portals.
* Alerts and notifications, while possibly being set by a manager, can be tailored to a team member’s specific needs, minimizing overcommunication.