

ProjectSolve^{SP} Primer, V1.1

This document provides a basic introduction to WSP | Parsons Brinckerhoff's ProjectSolve^{SP} application.

BASIC INFORMATION

Like ProjectSolve² before it, ProjectSolve^{SP} is primarily a web-based collaboration tool that can be used to create and deploy project websites for WSP | PB client projects to allow them to share information between project team members; but it is capable of so much more than that.

Because every ProjectSolve^{SP} site starts off as a blank page, with a series of available tools ready for deployment, every site can take on a different appearance depending on the specific needs of the project and what the person creating that project site is trying to accomplish.

Site Examples

Below are two examples of how a basic ProjectSolve^{SP} site can be configured to meet the identified needs of a project and the team members working on it.

- A basic project site with “Smart Buttons” (which are easier to click on from a tablet or mobile device) is shown in Figure 1:

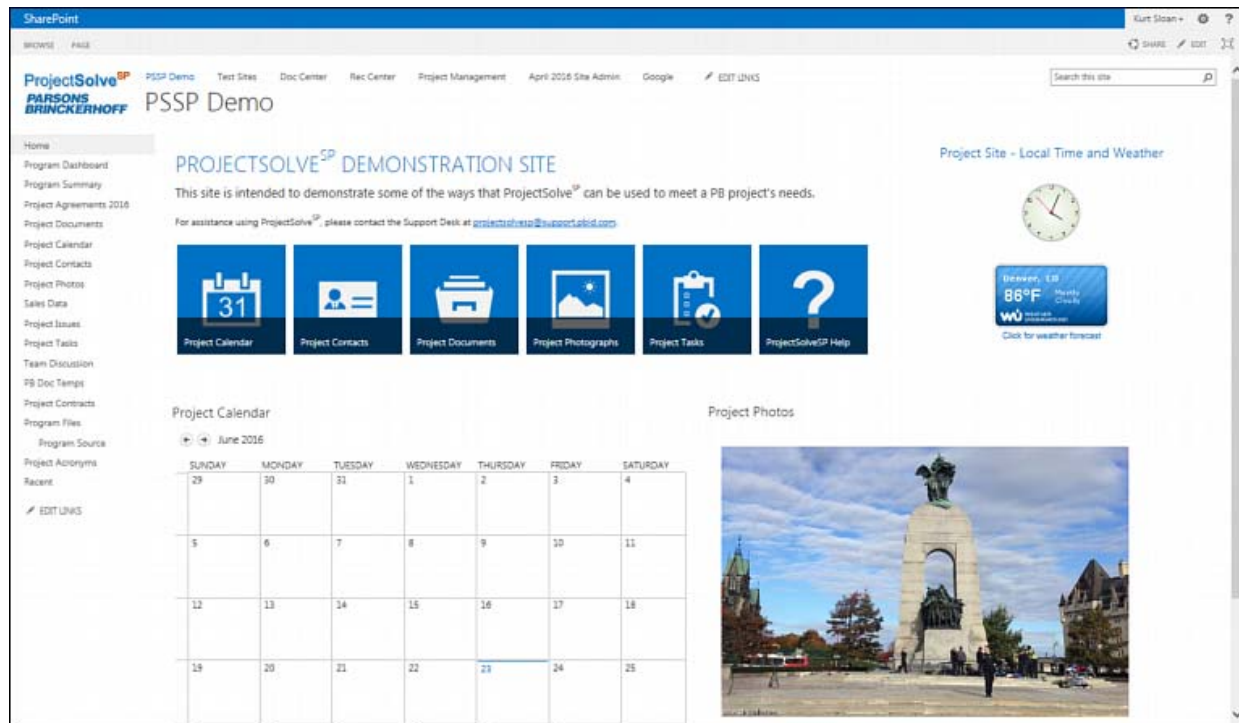


Figure 1 - Basic PSSP Site with Smart Buttons

- A project management site with a more traditional icon-based navigation system and user specific information displayed on the landing page is shown in Figure 2:

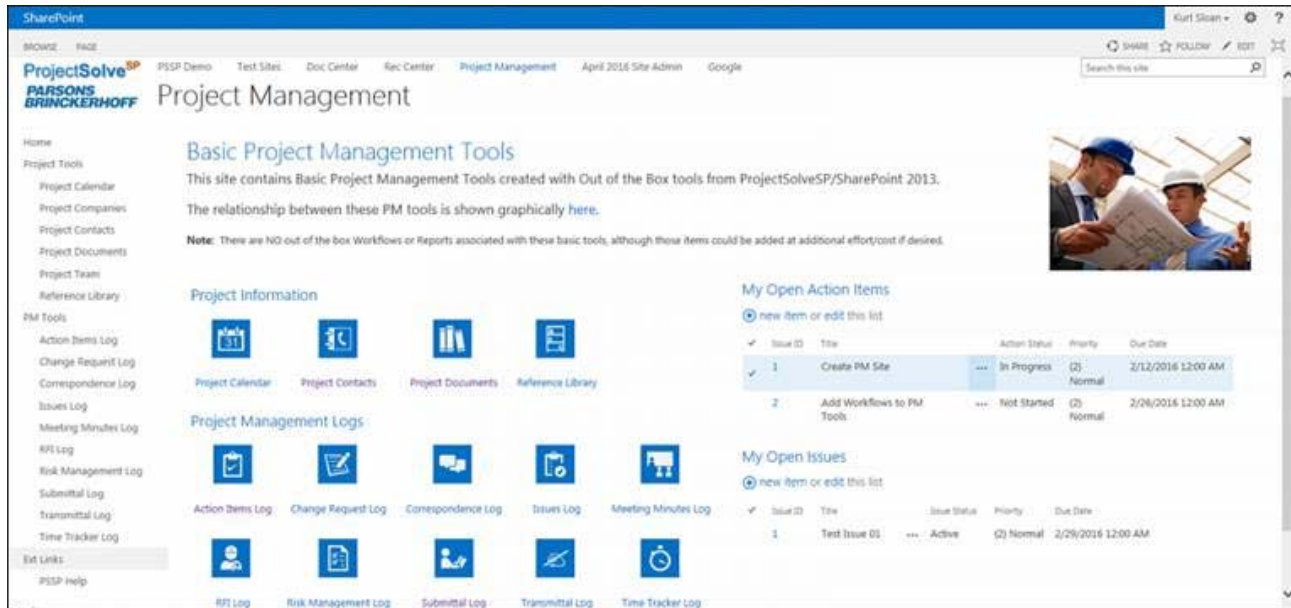


Figure 2 - PSSP Site with Traditional Icons and User-Specific Information

Tools

ProjectSolve^{SP} is built on top of a Microsoft SharePoint 2013 Enterprise environment which includes a series of pre-made tools available for any site to utilize out-of-the-box, including:

- **Calendar** – A traditional calendar application for tracking events; it can be tied to a user’s locally installed Outlook Calendar
- **Contacts List** – A list of contact information for project personnel which can also be displayed as a User List in Outlook
- **Document Library** – A collection of project-related files (this is the main tool for accessing and displaying project information on most sites)
- **Announcements** – An area that can be established on a project site and used for posting project-related announcements to users as they access the site
- **Picture Library** – A library for storing project-related photographs; this tool automatically creates thumbnails of the files as they are added for easier identification by users
- **Photo Rotator** – This is a display feature that ties directly to a specified Picture Library and displays the photos from that library on a timed loop
- **Task List** – A tool for identifying project-related tasks and assigning them to specific individuals on the project and then displaying them against a project-time line or in a Gantt chart format
- **Wiki Page Library** – A tool for creating a project-specific collection of information pages (similar to Wikipedia)
- **Links List** – a tool for displaying a specific list of hypertext links for quickly navigating to other parts of the project site, other project sites, or areas of the internet directly from the project site
- **Discussion Board** – A threaded message board that allows team members to quickly and easily share information and ask / answer questions with other members of the team
- **Promoted Links** – These are the large, Windows 8-style smart buttons (as shown in Figure 1) that are easier to use when accessing a site from a mobile device or tablet
- **Issue Tracking** – This is an issues log that can be used to identify project-related issues and assign them to team members with system-generated email-based reminders
- **Survey** – An online survey tool that collects the information and presents it in a bar chart comparison

SharePoint also includes advanced document management features that provide higher-end project-management functionality, but also require additional setup and configuration time before they are usable on a project site:

- **Record Center** – a built-in Records Management System that can be used to identify and store permanent records for a given project and retain these records for a set amount of time based on established retention policies and business rules
- **Legal Holds** – a method for establishing and implementing temporary legal holds to protect documents from modification or deletion while dealing with one or more lawsuits against a project or program

As shown in the Basic Project Management Tools site above (Figure 2), we have also created a series of Project Management related Data Logs that can be easily deployed and repurposed on a ProjectSolve^{SP} project site in order to provide basic project management features in a short amount of time, including:

- **Action Items Log** – A basic log for tracking project-related action items and tying them back to the meeting or tool where they originated
- **Change Request Log** – A basic log for capturing and tracking change requests for a project
- **Correspondence Log** – A basic log for capturing and tracking project correspondence
- **Daily Report / Field Notes** – A tool for capturing daily activity and field conditions from a job site
- **Document Control Log** – A log for tracking and administering project-related documents
- **Drawing Submission Log** – A log for tracking and reviewing project-related drawing submissions
- **Lessons Learned** – A log for capturing project-related lessons learned
- **Meeting Minutes Log** – A basic log for capturing and tracking project meeting minutes; this can be tied back to the Action Items Log for easier identification of requests
- **Milestones Log** – A log for tracking project-related milestones
- **Punch List** – A tool for creating a job site activity punch list and tracking the items through completion
- **RFI Log** – A basic log for capturing and tracking requests for information for a project
- **Risk Management Log** – A basic log for capturing and tracking project risks
- **Submittal Log** – A basic log for capturing and tracking project submittals
- **Transmittal Log** – A basic log for capturing and tracking project transmittals
- **Time Tracker Log** – A basic log for capturing and tracking time spent working on a project for a given week

NOTE: By default these logs do NOT have reports or workflows associated with them but those could be added with some additional work by report or workflow specialist if required by the project.

Additionally, because ProjectSolve^{SP} is built on SharePoint 2013, which is part of the Microsoft Office 2013 suite of products, there are out of the box interactions in place that allow ProjectSolve^{SP} and various Microsoft Office 2013 applications to work together more efficiently, especially Word and Outlook.

ADVANCED FEATURES

There are a number of advanced features included with SharePoint 2013 that users can take advantage of when creating a ProjectSolve^{SP} web site for their project as well, including:

- **Search Refiners** – When performing a search against the information stored within a ProjectSolve^{SP} project site, the system provides a refinement area (Figure 3) that can be used to quickly narrow down the returned results so that users can more quickly find the information or item they are looking for

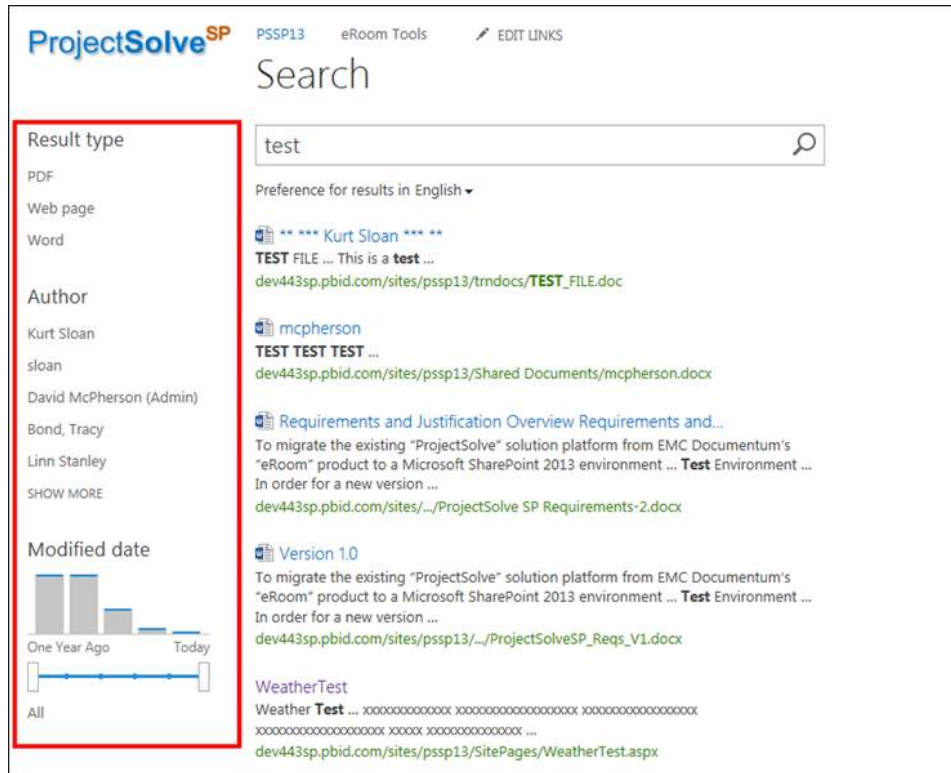


Figure 3 - PSSP Search Refiners

- **Document Preview** – we have included a number of tools within ProjectSolve^{SP} that allow you to preview a file without having to open it first

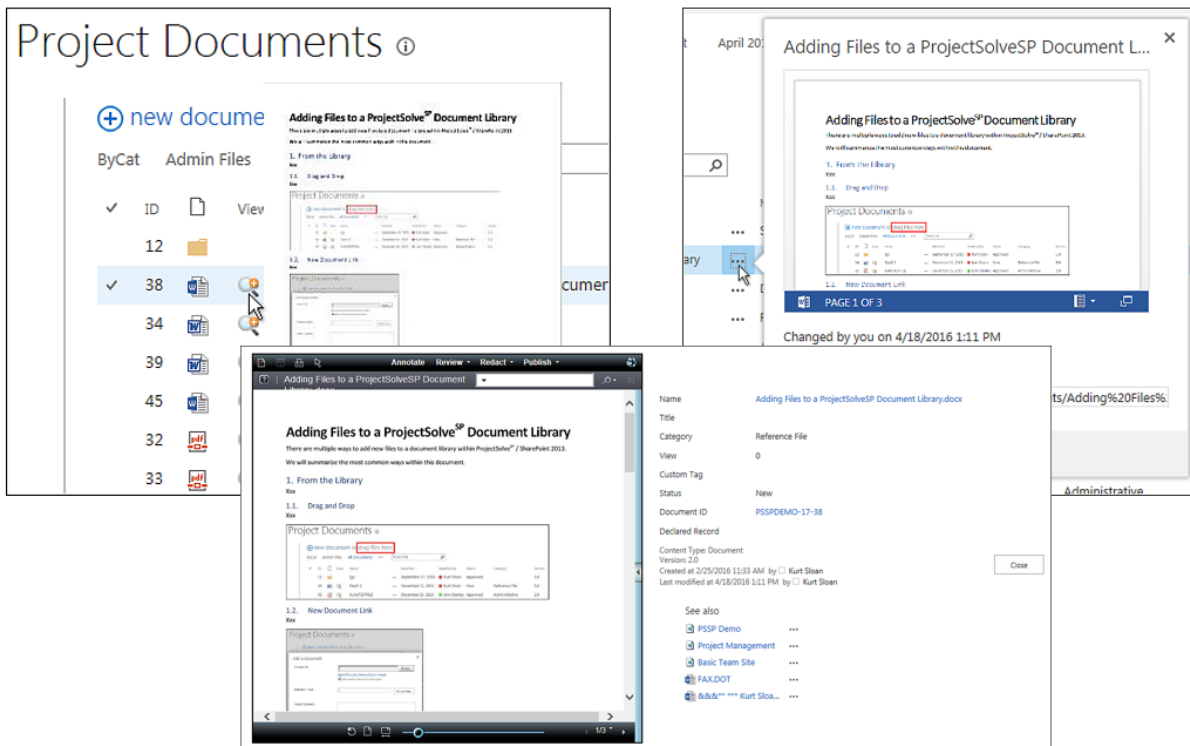
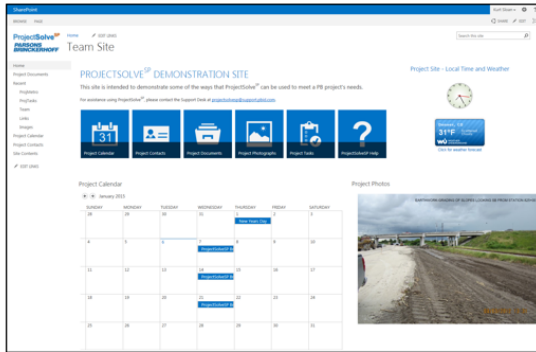
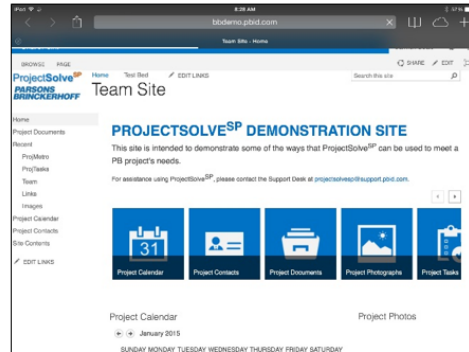


Figure 4 - PSSP Document Preview Tools

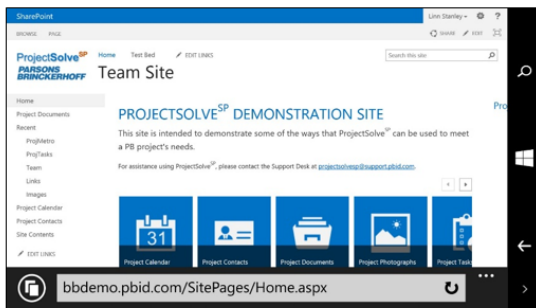
- **Mobile Device Access** – one of the many features that sets ProjectSolve^{SP} apart from ProjectSolve² is that it is designed to be accessible directly from various mobile devices not just PCs



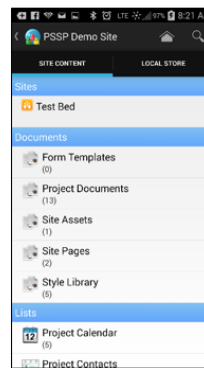
Original Site
(PC Screen Shot)



iPad
(no additional software)



Windows Phone
(switch to "PC View")



Android Phone
(via "SPConnect")

Figure 5 - PSSP Mobile Device Access

- **Nintex Workflow** – ProjectSolve^{SP} comes with a graphical workflow engine that can be used to easily draw out a desired workflow and then have the application create the code needed to implement that workflow on the project site

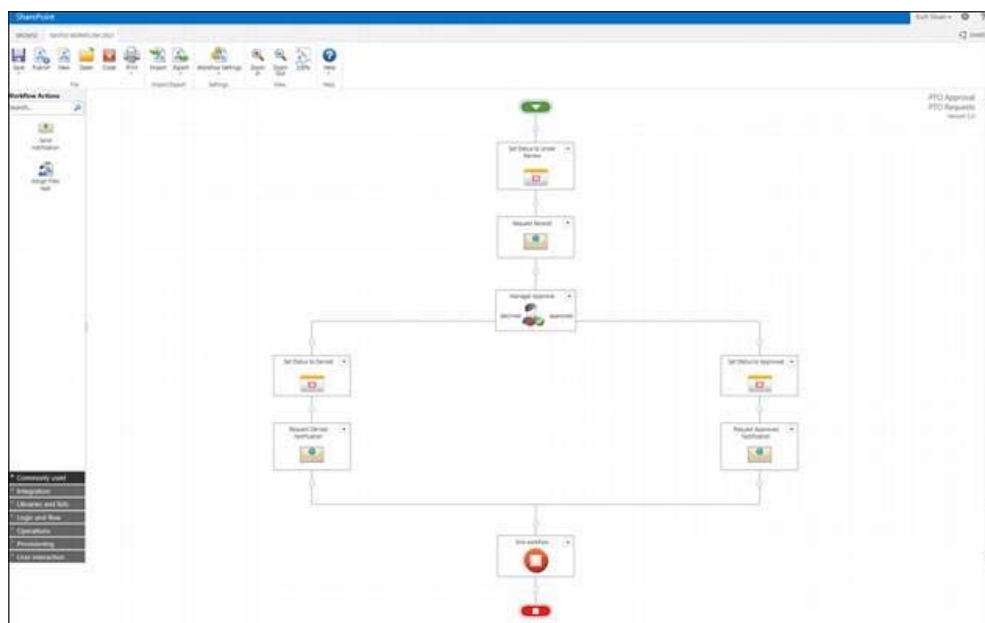


Figure 6 - Nintex Graphical Workflow

- **Charting tools** – ProjectSolve^{SP} includes a couple of different charting tools that can be used to create an Excel style line or bar chart and tie it to a specific SharePoint list or Excel Sheet located on the site:

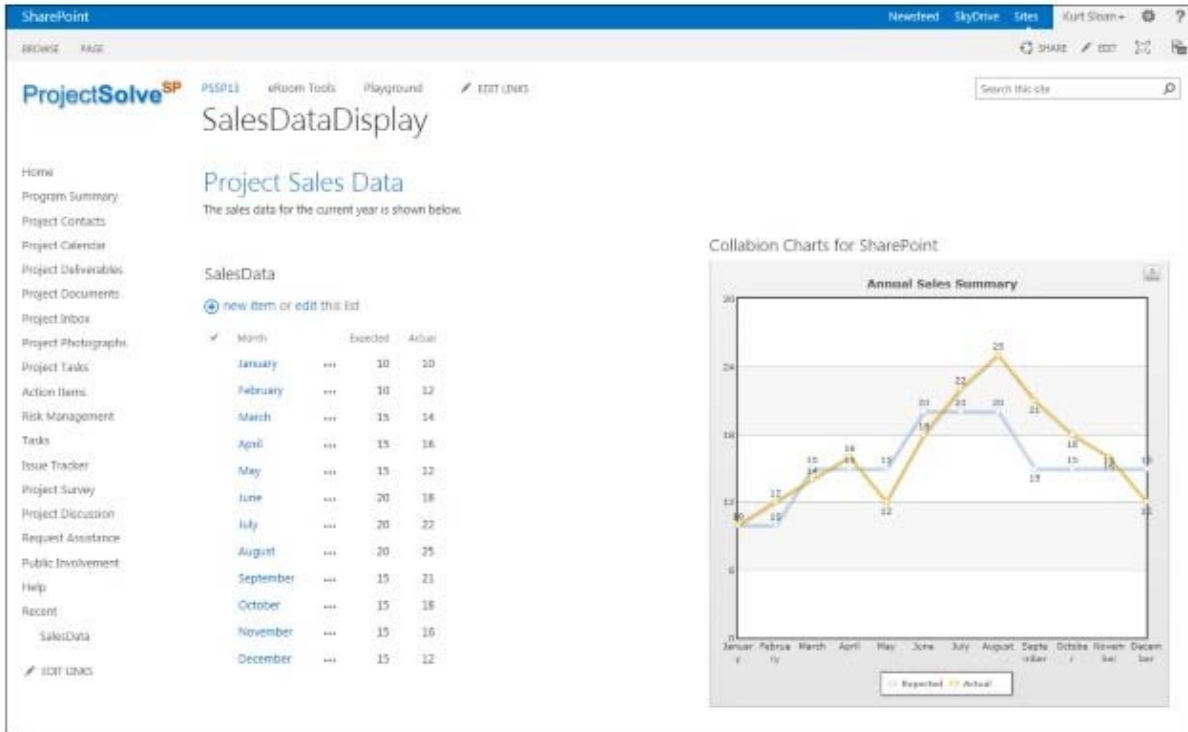


Figure 7 - PSSP Charting Tool

- **Excel Pivot Table** – If a project has personnel who utilize Microsoft Excel Pivot Tables as part of their job function, there is a way to display those files directly from ProjectSolve^{SP} and allow people to easily use the built-in pivot and filter features contained within them

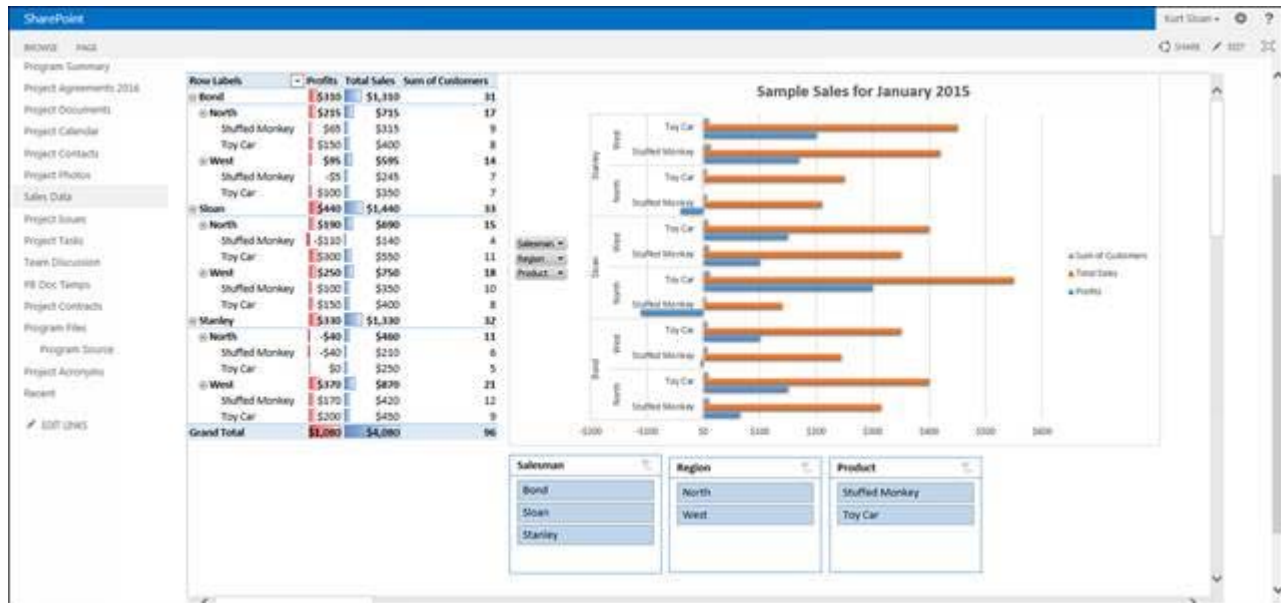


Figure 8 - Excel Pivot Table

- **Dashboard** – With a little extra work by a coordinator or site owner, a basic dashboard can be created that includes a series of standard bar or line charts and ties them directly to data stored within a project site; this approach provides up-to-the-second, self-updating data displays of project information similar to what is shown in Figure 9

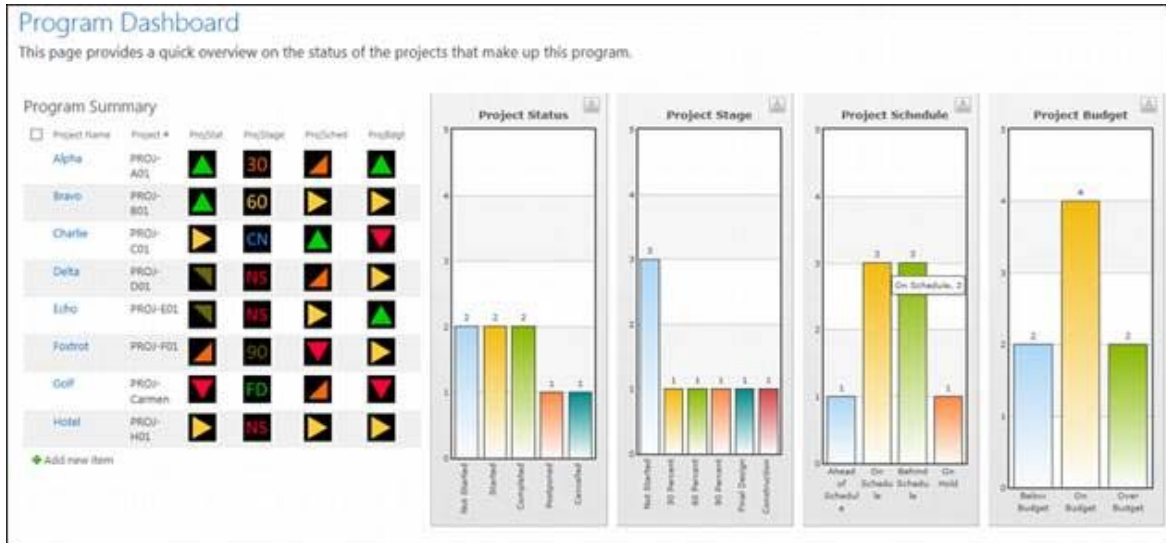


Figure 9 - PSSP Dashboard

- **Offline File Editing** – Because SharePoint 2013 is part of the MS Office 2013 product suite, it has a direct tie to Microsoft’s One Drive product that ships with MS Office 2013 Professional. This tool allows users to download files from a given document library in ProjectSolve^{SP}, edit those files from their computer when not connected to the internet and then to have the system perform automated bi-directional updates on those files the next time that user successfully makes a connection with that project site ¹

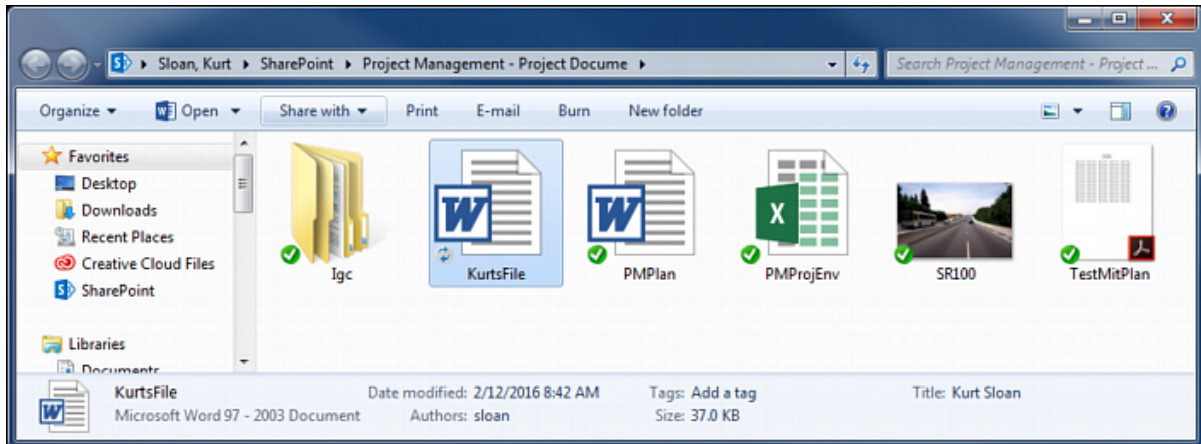


Figure 10 - Microsoft One Drive Connected to PSSP

¹ As of September 2016, this feature has been deactivated on WSP | Parsons Brinckerhoff Corporate machines, but should still work for user’s whose company has not deactivated the feature local to their personal computers.

ADDITIONAL INFORMATION

Finally, we have created a full-blown ProjectSolve^{SP} Help and Training site that can be accessed at: <https://public.pbid.com/sites/help/>

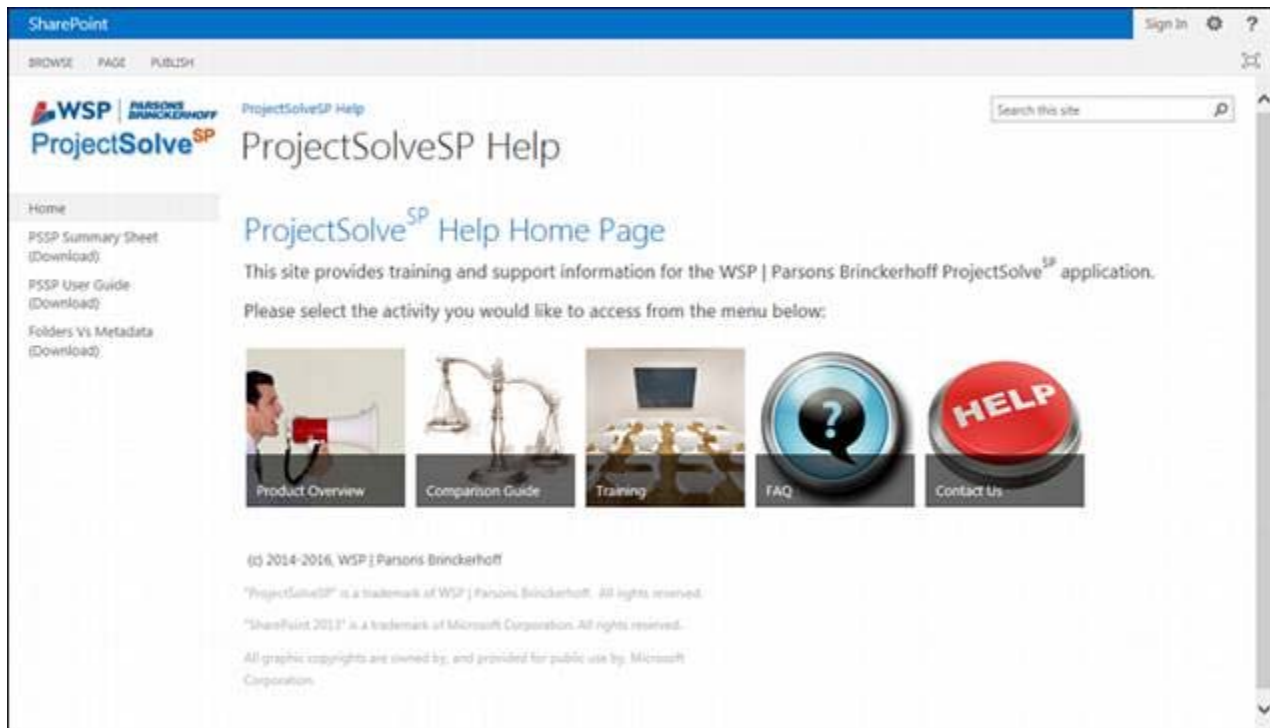


Figure 11 - PSSP Help Site Landing Page

This site provides marketing data, training files (both PDF-based write ups AND MP4-based videos), as well as downloadable white papers and user guides to help make learning and using the product easier.

Additionally, WSP|PB has set up a dedicated help desk for ProjectSolve^{SP} users and project sites that can be reached by sending an email request to:

ProjectSolveSP@Support.PBID.com

Please feel free to reach out with any questions you might have on the product.