In Process Draft of a White Paper Pertaining to The Use of ProjectEDGE for Managing Communication and Collaboration

W. Gary Craig, President, ProjectEDGE.com
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PROJECT EDGE

ProjectEDGE is a groupware-based communication and collaboration application designed for managing communication, best practice knowledge management, workflows and roll-outs in a wide variety of industry applications. ProjectEDGE is a secure Extranet for sharing centralized databases of information between participants on a secure basis in which each party's access to information can be tightly controlled.

ProjectEDGE uses many templated solutions to allow its users to quickly implement workflow process consisting of a few or many tasks.

When used for knowledge management and best practice, ProjectEDGE can provide one single location where all authorized individuals or companies can go to find the most recent information on any subject that has been posted by authorized persons. Users can subscribe to posted information to receive a notice automatically whenever new postings have been made. An automatic audit feature records the creation, editing and accessing the documents whenever that occurs. Most users could be trained in less than two hours with casual users needing much less instruction.

This white paper will describe several of the ProjectEDGE functional modules that an organization or group could use to facilitate communication and collaboration of building a knowledge base for all to use.

One Project or Many

ProjectEDGE can be used to manage one project or a program of many projects. When managing a program of projects, those projects would be typically organized in some structure that mirrors the organizational structure of the host organization. Depending upon the needs of the sponsoring organization, the projects could be organized according to their region, product line, function or other parameters.

ProjectEDGE allows user organizations to develop multilevel structures that define the hierarchy of their project organization. The specific format that is used is a work breakdown type structure (WBS) that should be familiar to individuals in organizations tasked with project management.

Action Items

Action items are used to track any follow-up or time-related item within the database.

Some action items are created by users, while others are generated automatically and flag items that are coming due. An Action Item is a time sensitive task assigned to one or more individuals for completion on or before a date certain. Absent any higher access privileges, access to any Action Item is limited to the author, the assigned person(s) and any copied interested parties.

Action Items created in this module can also be created as collaborative Action Items in which several persons work together to define the description of the Action Item. If there are any interested parties who need to be copied on the Action Item, their individual names or the name of any groups to which they are members can be entered before the Action Item is locked and launched.

When an Action Item is launched and when it is completed, the involved persons, as well as the copied parties, are sent an electronic notice of the launching or the completion.

The opening view for Action Items can be personalized based on the preferences of the user. While I prefer to initially view Action Items by the responsible person, others may prefer to view the Action Items by due date.

The options that are available for initial opening or for subsequent user selection include:

- By Due Date
- By Responsible Person
- By Company
- Completed

Action Items from Other Modules

Action Items created in other modules include:

- Follow-up Action Items to a letter or a memo to insure that the requested information is received.
- Reminders to follow-up on a contact management conversation record.
- Follow-up to a meeting item filed as part of a threaded discussion.

Action Items from Templates

Anyone having a defined rollout process or a sequence of tasks for any other purpose, can set up a template in ProjectEDGE for each such set of items. The template can have a description of each task to be performed along with assignments of persons responsible and their backup so that when a new project or series of tasks is initiated, the sequence can be implemented with a few clicks and then tracked on an item by item basis until each is completed.

Uses of such a rollout could include the following:

- Rollout of a new location
- Loan closing checklist
- Due diligence for a proposed new location or venture
- Condition assessment of existing location requiring inspection by many different disciplines or trades.

Discussion

Threaded discussions are collaboration tools in which a topic is created to store information as part of a knowledge database or as an improvement topic for discussion by others. Once the document is published, all authorized or invited users will be able to read the information and create their own response, including adding any appropriate attachment files. Each response to some previous response are all threaded together linking them back to the original topic. By following the discussion thread upward or downward, the original topic statement and all of its responses can be seen.

All of the discussion topics should be categorized by one or more of the user-defined major or minor categories. Because of the user-defined categories, the discussion module use can be extended in its capability to mimic some of the features found in other modules such as Drawings and Meeting Minutes. See the examples below.

The discussion section uses threaded discussions for activities such as:

- Recording and verifying architectural and engineering programming content
- Value-engineering such as discussions of new materials for store fronts or display fixtures
- General improvement topics such as how to reduce delivery cycle time
- Issue management to track all Issues and their resolution
- Knowledge transfer
- Best Practice Library
- Publishing operating or safety manuals

Charette Story Boarding in Threaded Discussions

In conjunction with collaboration tools such as SmartBoards, the project team creates the electronic equivalent of flip charts and then stores them as an electronic file in the discussion database where they can be consulted and even updated. In lieu of a SmartBoard or similar device, conventional flip charts could be scanned and then attached in their equivalent electronic file.

Meeting Minutes in Threaded Discussions

Users can attach electronic files of the meeting minutes for use by other team members. When used this way, the discussion to which the meeting minutes are attached are categorized as Meeting Minutes with minor categories by the type of meetings such as programming, core team meeting, kickoff and closeout. Individual Action Items could be used for each posted meeting. User comments can be attached as response documents.

Use of Standard Documents in Threaded Discussions

Many organizations have standard documents for authorizations, meeting minutes, inspection reports and other preformatted organizational forms. Such documents can be attached in their native format or as Adobe PDF files for a wider readability.

Through the use of a hierarchal structure, known as a work breakdown structure (similar to an organization chart), documents can be posted at any level of the structure for reading at that level or any level below it. This feature allows the author of the document to post the information once where it is automatically made available to all the authorized users in what appears to them to be a private database for their location only.

Communication

Instead of using individual e-mails having no audit trail that:

- may be deleted by the parties, either deliberately or inadvertently
- have inadequate security provisions, the communication features of ProjectEDGE are used to build a secure knowledge base of project communications.

Letters, memos, faxes, transmittals, records of incoming correspondence and conversation records can all be created and maintained in the Communication module. The content of these documents is created directly in the Communication module by typing, by voice recognition software or by pasting the material from some other application. Once in ProjectEDGE, the subject matter can be collaborated upon and securely locked when appropriate. The access to the document and the security and integrity of the document can be depended upon in contrast to an e-mail where the same assurances cannot be made.

Memo or Fax

A fax is distinguished from a memo by its method of delivery. Electronic notification of a fax is recommended unless the party to whom the fax is addressed has no means of receiving the electronic notification. A memo (or fax) is used for general communications not involving a conversation. An example of a memo is a communication written to a consultant pointing out the need for their participation in a site inspection.

Stationary

Stationary is another form of template in which the users can define commonly used documents that are written and placed in a repository for use whenever needed. The subject matter of the documents can be varied as needed. Examples of templated documents include:

- Lease default letter
- Lease renewal reminder
- Contractor notice to proceed
- Insurance certificate follow-up
- Safety violation notice
- Any other commonly occurring communication

Transmittal

The transmittal is an electronic form of its paper-based equivalent used whenever it is advisable to list the components of a physical delivery. For example, if CD copies of specifications and bid documents were sent to each consultant, a transmittal would list each component of the number of copies, the date and other information that is typically forwarded with a standard transmittal.

Contact Management with Conversation Record

The conversation record is a document used to record notes made from face-to-face conversations or from telephone conferences. The conversation record is often used as a collaborative tool in which users record their comments from a series of discussions with others. Notes that have been entered can be pushed to the historical section where they are locked to prevent any change.

When follow up is required, the user either sets a future date in the document or uses a Reminder to set a reminder of the future action.

Reminder

A Reminder is a special form of an Action

Item that is a follow-up reminder used to remind the addressee to complete the actions required by the referenced document specified in the Reminder.

Drawings

The drawing section is used for collaborating on drawings, cataloging and distributing drawings. In addition to drawings, such other documents as specifications, architect supplemental information and tenant manuals could also be attached to the database. Authorized users review drawings on-line and apply nondestructive markups with web browsers.

The drawing section is used for such purposes as:

- Maintaining a current list of drawings, maps and sketches
- Maintaining historical drawing lists
- Maintaining archives of specifications, consultant and other reports
- Receiving notice of changes to drawings
- Publishing as-builts

Phonebook

The phonebook section contains all the contact and lookup information for the database. Its uses include:

- List of all contacts categorized by user-defined categories such as contractor, architect, landlord personnel and any other needed categories
- Source of phone list and directory printed out before leaving on a trip

Photos

The photo section is used to document such items as:

- Construction progress
- Condition of the facility at the time of a particular visit, including photos taken to demonstrate whether the facility is ready for your work to begin
- Photos of damage revealed after uncrating fixtures
- Progress photos sent in by contractor along with their invoice
- Any scanned, digital photograph or web cam capture

Survey

The Survey module is designed to provide for collection of information on survey forms used for a wide variety of purposes. For example, a due diligence survey on a new location could include such information as zoning, availability of a utility such as sewer, water or for a condition assessment of an existing facility. The survey could also be used for periodic inspections of franchisee locations or might be used for self-reporting of facility conditions by franchisees to the franchisor.

This feature was used by Dell Computers to roll out seventy-one mall Direct Stores in six weeks.

For more information on ProjectEDGE, white papers or demonstrations, visit our web site at www.projectedge.com or contact us at 888-516-EDGE, Fax 315-471-6659 or e-mail at projectedge@edgewaternet.com.

About the Author:

W. Gary Craig is a University of Toronto graduate with a degree in Civil Engineering and a diploma in Operations Research. Mr. Craig also holds a Master of Science in Management from Rensselaer Polytechnic Institute. Mr. Craig has over 30 years of experience in construction management and real estate development.

To learn more about Managing Communication and Collaboration contact:

W. Gary Craig, President
ProjectEDGE.com
225 Greenfield Parkway, Suite 102
Liverpool, NY 13088
Tel. No.: 315-471-4420 ext. 170
Fax No.: 315-471-6659
Email: gcraig@edgewaternet.com

Chris Crockett
ProjectEDGE.com
1782 Penfield Road
Penfield, NY 14526
Tel. No.: (585) 641-3060 ext. 105
Fax No.: (585) 641-3064
E-mail: ccrockett@projectedge.com