The Use of the ProjectEDGE Extranet for General Business Applications

W. Gary Craig, President, ProjectEDGE.com
Last Revision Date: May 15, 2006

The growth in the use of Intranets and the Internet has provided organizations of all sizes with the ability to use common communication tools for all participants regardless of their location. This functionality can be made even more powerful by creating an Extranet through the sharing of internal information with external participants from other organizations. Whether hosted internally or through Application Service Providers (ASP), secure access can be provided to selected organizational information. This white paper will discuss how the ProjectEDGE Extranet is used in general business applications.

The ProjectEDGE Extranet was developed as a project management application for all aspects of the real estate development and related construction management endeavors. The most recent release of ProjectEDGE provides a modular approach in which users select the modules most appropriate to their business needs. Since most business needs revolve around the need for communication, delegation of responsibility and follow-up, many of the ProjectEDGE modules are appropriate for use in most organizations. This white paper will discuss typical uses of some of the modules as they may be applied across the organization.

Action Items

The term Action Item describes any issue for which there is one or more assigned persons who need to provide a response by a specified due date. Since this definition is very broad, we will use several examples to illustrate the use of Action Items.

Before implementing a new business process, the Postal Service decided to use a consultant to conduct focus group sessions at a number of their facilities. The writing of the RFP for the focus group consultant is delegated to three persons as a collaborative Action Item. Each of the three persons, including one in an external organization, receive an e-mail notice about the assignment. Each of the individuals click on the link provided in their respective e-mail systems and are taken through the Extranet to the specific Action Item where they can enter their response. Simultaneous with the notice to the three assignees, a group of managers, who were copied as interested parties, also receive notification of the pending Action Item.

One of the participants inserts a link to a copy of a standard RFP document and then provides electronic notice to all the involved parties so they can go to it and review it. The link that was provided leads to a threaded discussion in which a copy of the standard RFP is posted. As the collaborators work on their assignment, they update their work product in the threaded discussion. Assuming that they have not made the threaded discussion "private", other interested parties following the transaction would follow the same links to see the status of the work product.

At any point in the process, any of the collaborators or interested parties, can click on any of their e-mail links or in a view of open Action Items to check on the progress. When the item is finally completed, all the interested parties receive electronic notice of the completion so they can read the results if they are interested. Other general uses of Action Items could include:

- Preparation of the agenda for a school board meeting.
- Making of airline and hotel reservations for an upcoming trip.
- A personal reminder to renew a professional membership before the cutoff date or discounts at the upcoming national conference.
- A reminder to the controller staff to add postage to the account for the departmental postage machine.

Many e-mail systems contain a calendar and a "to do" function, but there is no common system when people from several organizations are working together on joint ventures, mergers, and other similar activities where many different organizational infrastructures come into use. An Extranet provides everyone with a safety net by providing a common accessible application that transcends the differences in all of their systems. If there are concerns about security compromises due to giving outsiders access to the organization's computer infrastructure, the Extranet can solve that problem by providing a secure setting outside the organizational fire walls where all participants, regardless of computer, hardware or software, can use no more than an Internet browser to transact their mutual business.

Depending on whether which other modules are in use, Action Items can also arise from communications, meetings and workflow driven approval routings.

Communication and Contact Management

Almost everything that each one of us does on a daily basis involves some form of communication such as telephone or face-to-face conversations, letters, memos, faxes or Internet chats. Each person uses different techniques, physical systems and computer applications and there is no central location for our communications unless we use an Extranet product in which all the participants can store their communications. The output of paper based systems is only available to the individuals who have a copy with them wherever they are, whenever they need it. Unless we live in a file room twenty-four hours a day, none of us has that type of access to the information. An Extranet such as ProjectEDGE can solve that by making the information available on a secure basis twenty-four hours a day from any location with Internet access. Persons with client software and a local replica of the information don't even need the Internet access.

In addition to creating and storing standard communication items such as letters, memos, faxes and transmittals, users employ conversation records as a contact management tool to record all of their conversations with the party while involving as many other members of their group as needed. This is best illustrated by following example. Before I call Image Press, our local pre press company, I initiate a conversation record into which I type (or paste from some other source) a list of items that I need to cover about the negatives for an upcoming ad campaign. When I reach John on the phone, I review my outline with him and make notes directly into the conversation record. Some times I make notes on paper, since my keyboarding can't keep pace with the conversation. When our conversation is over, I can fill in the rest of my material from my hand written notes, dictate the notes or enter them directly with voice recognition software depending upon their availability.

My notes can be left as private notes or can be shared with other individuals depending upon how I set up the conversation record. My normal practice is to include the person with whom I have had the conversation (done automatically) along with interested readers that I select. By doing this, when I set up the conversation record, I can notify any or all of the referenced parties electronically so they can review my notes. If my list of readers include someone that I want to follow through with Image Press while I am away, I lock my own comments by putting them into history and then electronically notify the person to take over my conversation record and my task with John. I can follow their discussions by reading the content from anywhere that I have web access. I can even add my own comments or direction about what has occurred and then notify each of the interested parties that I have made a comment.

Each of us involved in this transaction has a full record of our conversations, to the extent that we want to share them, so they can assist in reaching a solution or reference the material in the future whenever they need to.

Throughout the process, the person in control of the conversation record continually re-dates the document for the next time the contact should be made and that process continues all the way to conclusion of the issue, at which time the current time and date should be stamped on the document.

Another example of the use of communication tools would be to send a letter or memo based on a standard form. A reminder of a lease expiration could be sent by using a template to create a letter or memo that is then addressed to the lessee by selecting their name from the phonebook picklist. If the template notice form already incorporates all the other interested parties that are copied, everyone then has the ability to read the document after they receive notice of its creation.

Audit Trail

The above example of a lease expiration notice is a good way to illustrate the use of the document audit trail which records when each edit was made and by whom. When a document is finally locked that is also recorded. All the readers of the document are logged with both the time indicated by their local computer as well as by the server, in addition to the version number of the document that they read. I use the audit trail if I want to check whether a noticed party had read the document, as well as when. There have been many times when this information has given me the upper hand when speaking to someone who said that they hadn't read my memo. I can verify the accuracy of that claim, as well as tell them the time and date and versions that they have read. This ability to dispute someone's claim has helped me gain their cooperation.

Discussions

Threaded discussions are a collaboration tool in which an author proposes a topic for consideration by others who make their responses through response documents that are "threaded" to tie them to the original question. Each subsequent response answer and clarification continues the thread until the collaboration is completed. The discussions and subsequent responses are organized into user-defined categories.

Threaded discussions are useful for a wide variety of general business topics such as:

- Business process re-engineering
- Building a knowledge base
- Stimulating collaboration
- Collecting best practice

As a best practice tool, employees with a proven best practice in their area of expertise would document the best practice in a discussion topic. Their description could be supplemented with charts and diagrams, photos or any other relevant attachment. Any person with less experience than the author can read the discussion and begin from the knowledge base of the experienced user rather than learning the lessons through on the job experience. Any individuals with expertise for observation on the best practice should also contribute their remarks as response documents so that the best practice can be strengthened and improved over time.

Best practice can take many forms and vary in level of complexity. One of the most effective best practices that we collected was how to address envelopes so they were handled at a consistently faster pace by the postal system. A few simple rules were all that were needed to allow everyone in the organization to reduce their mail transit time by a day or two.

Meeting Minutes

Every organization has meetings of one type or another. Most do not have a planned agenda for their meetings nor do they have on-line publishing of the meeting minutes. Extranets like ProjectEDGE can bring those tools to any department or subdivision in your organization which will benefit from having their minutes structured in a common way where all authorized persons can access them, add comments and respond to action items. The ability to publish the minutes shortly after the meeting is strengthened by the ability of readers of those minutes to contribute additional comments and even add their supporting electronic files.

Extranet based minutes allow an organization to hold a virtual meeting in which the facilitator prepares an agenda and outlines the discussion to be considered by the invited participants. The meeting facilitator provides a notice to everyone giving them access to the agenda topics and setting the deadline for their independent responses. Each meeting participant goes on-line to read the outline discussion material, as well as any previously posted comments before adding their own. At the meeting deadline, the facilitator reads all the comments and publishes a consensus based upon all the known information. When the consensus is prepared and published, all the meeting participants will receive a notice that allows them to go back in and read the minutes as published. If needed, they can add their own additional comments, as well as attach any additional supporting materials.

Phonebook

The phonebook and its coded categories is best used in conjunction with other modules as the source of contact information for those. However, the phonebook could be used separately.

Other Modules

There are several other modules that have general business use, but to a lesser extent than those described above. A brief description of the general uses of other modules follows. See the ProjectEDGE web site www.projectedge.com for literature and white papers with more details about these modules.

Contracts

Organization managing contracts and purchase orders and work orders would find this module useful.

Photos

Anyone looking for an on-line repository for digital or scanned photos would be interested in this module.

Safety

Anyone dealing with production facilities or places frequented by the public, should look at the safety module.

Management Reports

For on-line status reports, budget and schedule reporting and an on-line slide show should look into the details of the Management Report module.

Service Request

Anyone charged with operating a facility and/or responding to user needs might find a solution for those issues in the service request module.

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 The Use of the ProjectEDGE Extranet for General Business Applications, 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

PROJECT EDGE