



## Project Management Portal Benefits

- Create and track important project documentation
- Keep projects on track with customized workflows, reminders and tasks
- Provide project managers with live, up-to-the-minute cost and project detail to aid in solid decision-making

# Project Management Portal

**A successful project doesn't just happen; it's planned and executed.**

Do your project managers spend valuable time tracking project documents through the approval process? Do you miss deadlines because documents get lost on someone's desk or buried in a project binder? If so, you need an integrated project management solution.

WennSoft Project Management Portal allows organizations to create documents and manage projects from one central location. Custom work flows keep project managers updated on project status, tasks they need to complete and dates missed by others (including vendors), allowing you to identify an issue before it becomes a problem.

Accessed via SharePoint 2007, Project Management Portal provides the tools your project managers need to create and track common project documents including:

- Change order logs and associated documents
- Correspondence
- Contracts and subcontracts
- Meeting minutes
- Photos
- Requests for information (RFIs)
- Shop and architectural drawings
- Submittal logs and associated transmittals



# Simplicity is Key

New technologies often fail because they are difficult to use or require a great deal of training, leading to low user adoption and a loss of productivity. Project Management Portal works the way you work.

Electronic documents mirror many of the paper documents still used today. Based on the widely-accepted Microsoft platform, Project Management Portal utilizes the Microsoft® Office® SharePoint® Server (MOSS) user interface, allowing your staff to get up and running quickly.



## Project Sites

Project Management Portal allows you to manage each of your projects from an individual project site. A top-level site contains companywide information. Upon login, users arrive at your company home page, from which they can navigate to individual sites containing separate content for each project. Per-site and document-level user and group permissions allow you to limit access to information to those that need it.



## Document Creation

The Project Management Portal provides the tools you need to create and track common project documents, such as RFIs, meeting minutes, daily job reports, safety meeting reviews, submittals and transmittals. Browser-based InfoPath® forms ensure consistent, speedy document creation.



## Document Management

Using Project Management Portal allows project managers to track the submittal and approval of project documents, helping them understand the potential impact on a project's schedule.

Industry-tailored workflows built on Windows Workflow Foundation direct a document to the designated recipient(s) and begin an approval/feedback cycle specific to the type of document and required response. Project managers receive reminders for overdue tasks, drawings, submittals or other actions.

Project Home Page

ID	Title	Assigned To	Status	Priority	Due Date	% Complete	Link	Outcome	Workflow Name
1	Please approve DailyJobForm_1 (external participant)	Jim Weninger	Completed	(2) Normal	12/14/2007	100%	DailyJobForm_1	Approved by Jim Weninger	Project Manager Approval
2	Please review RFI_1	Jim Weninger	Not Started	(2) Normal	12/20/2007		RFI_1		PM Portal Collect Feedback
5	Please review Transmittals_3	Jim Weninger	Not Started	(2) Normal	12/17/2007		Transmittals_3		PM Portal Collect Feedback
6	Please approve Transmittals_2	Jim Weninger	Completed	(2) Normal	12/15/2007	100%	Transmittals_2	Approved by Jim Weninger	PM Portal Approval
7	Send Revised HVAC drawings to electron	Tim Braun	In Progress	(2) Normal	12/28/2007	30%			
10	Please respond to RFI_5 (external participant)	Jim Weninger	Not Started	(2) Normal	12/18/2007	0%	RFI_5		RFIFeedbackWorkflow

Document

## Connect to Outlook

If you use Microsoft Outlook® for organizing documents, tracking tasks or managing contacts, the



Connect to Outlook feature will enable you to synchronize content from Project Management Portal to your project sites in Outlook.

When Project Manager Portal is synchronized with Outlook, project site content is also available offline. Any changes that you make offline through Outlook are posted to the server when you reconnect; these changes will also be accessible in Project Manager Portal once you refresh your browser.



## Increased Access to Information

As new project financial information is entered in Job Cost and Microsoft Dynamics™ GP, updates automatically appear in Project Management Portal, eliminating the need for duplicate data entry and the risk of errors.

Project Management Portal provides inquiry access to financial system items such as Job Status, with drill down to individual cost transactions, customer invoice summaries, customer change orders, forecast revisions, notes and attachments. Additionally, project managers can create forecast revisions and change orders and update field percent complete.



### DAILY JOB FORM

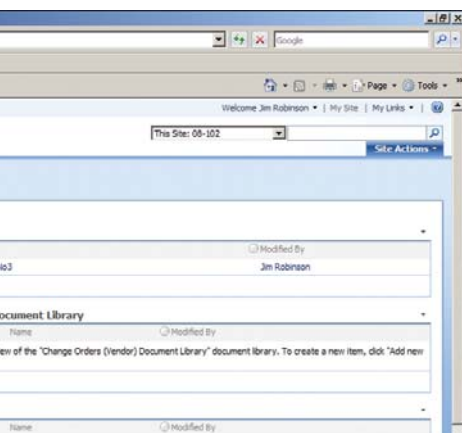
Created On: 12/12/2007  
Daily Job Form #: DailyJobForm\_1

Project #	07-110	Project Manager	Jim Weninger
Project Name	07-111	Construction Manger	Jim Robinson
Project Description	GE Corporate Office	Project Assistant	Tom Rathkamp
Job Address Main:	5110 Moorland Rd New Berlin, WI 53151	Job Address (Alt):	131 W Wisconsin Ave Milwaukee, WI 53202
Notes:		Job Phone:	(414) 432-4322
		Project Superintendent:	Tim Braun

## Link to Job Cost Inquiries with Update Capabilities

Cost Element Name	Estimated Cost	Posted Cost	Estimated Cost	Revised Forecast Cost	Forecast Flag
Labor	0.00	9,981.20	87,705.00	87,849.00	<input type="checkbox"/>
Materials	4,540.00	3,850.00	186,952.50	0.00	<input type="checkbox"/>
Equipment	0.00	0.00	0.00	186,952.50	<input type="checkbox"/>
Subcontractors	59,500.00	37,500.00	99,000.00	99,000.00	<input type="checkbox"/>
Other	0.00	0.00	5,500.00	5,500.00	<input type="checkbox"/>
EXFA	0.00	2,475.00	2,500.00	2,500.00	<input type="checkbox"/>
User Defined 1					

## Libraries



## Submittal Workflow Status

PM Portal > 08-102 > Submittal Log > Workflow Status

### Workflow Status: Submittal External Approval Workflow

#### Workflow Information

Initiator: Jim Robinson  
Started: 2/21/2008 1:22 AM  
Last run: 2/21/2008 1:23 AM

Item: RTUs and AHUs  
Status: In Progress

If an error occurs or this workflow stops responding, it can be terminated. Terminating the workflow will set its status to Canceled and will delete all tasks created by the workflow. = Terminate this workflow now.

#### Tasks

The following tasks have been assigned to the participants in this workflow. Click a task to edit it. You can also view these tasks in the list Tasks.

Assigned To	Title	Due Date	Status	Outcome
Jim Robinson	Please approve RTUs and AHUs (external participant)	2/25/2008	Completed	Task approved by Jim Robinson
Jim Robinson	Please approve RTUs and AHUs (external participant)	2/25/2008	Not Started	

#### Workflow History

The following events have occurred in this workflow.

Date Occurred	Event Type	User ID	Description	Outcome

# Microsoft Office SharePoint Server

Deploying Project Management Portal means you can easily utilize Microsoft SharePoint throughout your organization. SharePoint is tightly integrated with familiar client desktop applications, e-mail and Web browsers to provide a consistent user experience that simplifies how your staff manages content, processes and business data.

Extending Microsoft to your entire organization will provide your employees with a single, integrated location where they can efficiently collaborate with their team, search for organizational resources, manage documents and access relevant, up-to-date information when making critical decisions.

## **Business Intelligence**

Allow your staff to easily access critical business information, analyze and view data and publish reports to keep your organization informed.

## **Collaboration**

Empower teams to collaborate on the creation of documents, maintain task lists and implement workflows.

## **Increased Productivity**

Out-of-the-box workflows for initiating, tracking and reporting common business activities enable you to simplify everyday business activities.

## **Ease of Use**

By integrating Web-based team collaboration services into everyday tools such as Microsoft Office, users can quickly and effectively adopt new collaboration tools and services.

## **User-based Information Sharing**

Permission levels allow you to control the information employees can access, allowing you to share relevant data with employees that need it, while protecting sensitive information.



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