

Volume

1

INTELLIGENTBIZ

Virtual Team Collaboration & Project Management

User's Guide

INTELLIGENTBIZ

User's Guide

© The Marx Group
2111 Jeff Davis Hwy • Suite 303N
Arlington • VA 22202
Phone 202.550.0158 • Fax 703.418.0224
info@intelligentbiz.com
www.intelligentbiz.com

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Introduction to IntelligentBiz

IntelligentBiz Virtual Team Collaboration & Project Management Brings Enterprise-Level Tools to the Small Project Team – and Across Multi-Company Environments

IntelligentBiz provides a full range of online tools for project collaboration, management and reporting -- as an **application service**. IntelligentBiz is the ideal solution for virtual team collaboration and project management for:

- Multiple company project teams
- Design teams
- Short-duration projects
- Government project reporting
- Proposal teams
- Collaboration between project teams and customers
- Small business project teams

Your project team will be assigned a unique, secure TCP/IP address that may be accessed by project team members from anywhere using an Internet Explorer or compatible browser. No hardware or special software is required. Your project site provides multi-level access protected by *permissions* that are individually assigned to team members.

Team members can select from a wide range of pre-set databases and users lists, and modify or add to them "on-the-fly" as project needs change. Team members who "subscribe" to various lists and databases receive email notification whenever changes occur. For example, when the next draft version of a project report is posted to the project report document library, team members are automatically notified by email to review the document.

Standardized applications and reporting schemes provide seamless integration with team members in other companies. Document management is compatible with all standard office applications. Integrated help and tutorials make getting started easy, and

the IntelligentBiz' intuitive user interface means project team members need no training to use common features.

IntelligentBiz Services

- ✚ Virtual Team Collaboration tools and databases with an intuitive browser-based, user-friendly interface - no training required
- ✚ Virtual Project Management & Reporting tools with intuitive browser-based, friendly interface - no training required
- ✚ Process and Management tools
- ✚ Multi-media presentation services

IntelligentBiz can be provisioned and ready in just a few hours and maintained for a month or more, a year, or until your project is completed. IntelligentBiz uses Microsoft SharePoint Team Services™, Project 2002™, and Project Server 2002™ which are tailored for IntelligentBiz services, providing standardized databases that can be migrated to enterprise networks if desired.

Team Collaboration Services

IntelligentBiz team collaboration services include:

- ✚ Email notice to team members of project announcements
- ✚ Project calendars and event lists
- ✚ Task assignment and management
- ✚ Shared document libraries with version control
- ✚ Contact lists
- ✚ Project reporting
- ✚ Links to project tools and information sources
- ✚ Email notice of changes to any project data (selectable)
- ✚ Instant survey or polling of team members
- ✚ Team discussions of general topics or documents

You can learn more by viewing our demonstration site at www.intelligentbiz.net





Virtual Team Collaboration

IntelligentBiz Virtual Team Collaboration Services employ Microsoft SharePoint Team Services™ running on IntelligentBiz secure dedicated servers. Additional unique services are linked from the Project Team home page – providing a central point for all interactions.

IntelligentBiz Virtual Team Collaboration Services are based on Microsoft SharePoint Team Services™. This exceptionally versatile online application is supplemented by IntelligentBiz proprietary online tools that are accessed through SharePoint Team Services™. It is important for users to understand the basics of SharePoint Team Services™.

SharePoint Team Services Concept

The core of SharePoint Team Services™ is a collection of databases which can be modified (and additional databases added) by the user in real-time to tailor them to project requirements – all within a simple browser interface. These databases appear to the user as **lists** that show the contents of the database. Users don't have to know anything about databases to use these powerful features – just point and click to view or add items to lists (and underlying databases). Examples of lists and underlying databases include:

-  Team notices & announcements
-  Events & calendars
-  Tasks & assignments
-  Document libraries and folders

The second major feature of SharePoint Team Services™ is the embedded **applications** that permit users to perform a wide range of collaborative activities. Examples of applications and operations include:

- ✚ Document control
- ✚ Discussion boards
- ✚ Automatic change notification by email

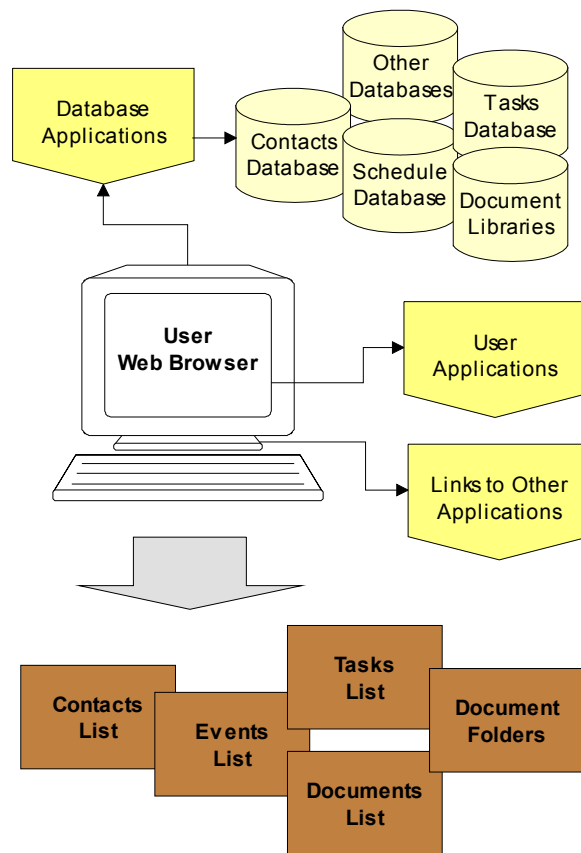
The third feature is **site settings** that control how the site is used and who may use various functions. Examples of site administration include:

- ✚ Adding users through “invitations”
- ✚ Assignment of user privileges
- ✚ Tailoring the look and content of pages

A project site may be set for **closed** access requiring every user to enter a password to reach the home page, or anonymous access where unregistered users may have a range of access from full access to limited view and read-only browsing of selected pages.

VIRTUAL TEAM COLLABORATION SERVICES

HOW IT WORKS



In the following sections we describe these features in more detail.

Home Page – Window to IntelligentBiz Services

The project home page is the central access point to all Virtual Team Collaboration Services. The layout and content of this page can be tailored by the project manager to meet project needs. It includes the main menu, *Quick Launch* menu and a summary of the content of lists that are selected for display. An important feature is the identification of new or changed information by the **!New** logo. A typical home page is displayed in the accompanying Figure.

The screenshot shows a web browser window displaying the IntelligentBiz Demonstration Site Home page. The browser's address bar shows the URL <http://www.intelligentbiz.net/>. The page has a blue header with navigation links: Home, Documents, Discussion Boards, Lists, Create, Site Settings, and Help. Below the header, the page is titled "IntelligentBiz Demonstration Site Home".

Quick Launch sidebar includes:

- Shared Documents
- General Discussion
- Contacts
- Tasks & Assignments
- Customer Briefings
- Reports & Due Dates
- Management Tools

Search Documents section includes a search box and a "Go" button.

Team Notices section:

- Header: **Team Notices** Add new announcement
- Content: **Welcome !NEW** by SHPT01\marxgrp 9/1/2002 8:19 AM. Welcome to the IntelligentBiz Online Project Management Demonstrator. If you are browsing without registration, you will have limited access and privileges. To register, see www.IntelligentBiz.com

Events & Calendars section:

- Header: **Events & Calendars** Add new event
- Content: 9/23/2002 4:00 PM **Project Review !NEW** Monthly progress review for tasks 1 & 2

Tasks & Assignments section:

- Header: **Tasks & Assignments** Add new item
- Table:

| Title | Assigned To |
|--------------------------|-------------|
| Task 3 Presentation !NEW | |

Shared Documents section:

- Header: **Shared Documents** Add new document
- Table:

| File Name | Modified By |
|---|-------------|
| There are no items to show in this view of the "Shared Documents" document library. To create a new item, click "Add new document" above. | |

INTELLIGENTBIZ ONLINE PROJECT MANAGEMENT section:

- Logo: **The Marx Group** (Microsoft SharePoint Team Services)

Contacts section:

- Header: **Contacts** Add new item
- Table:

| Last Name | First Name | Business Phone | E-mail Address |
|-----------|------------|----------------|----------------------|
| Marx | Donald | 703 418 1956 | don@themarxgroup.com |

Reports & Due Dates section:

- Header: **Reports & Due Dates** Add new item
- Table:

| Title | Assigned To |
|--------------------------------|-----------------|
| Sept Manhour Report !NEW | |
| Monthly Management Report !NEW | SHPT01 \marxgrp |

Links section:

- Header: **Links** Add new link
- Content: Proposal Support

The browser status bar at the bottom shows "Done" and "Internet".

Communicating With the Project Team

IntelligentBiz Virtual Team Collaboration Services provides a variety of flexible and user-tailored ways for team members to communication.

- ✚ Team notices & announcements
- ✚ Events & calendars
- ✚ Contacts
- ✚ Discussion boards
- ✚ Surveys & polls
- ✚ Document sharing
- ✚ Automatic email notification of changes or updates to any of the above, through user-selected subscriber services.

Team Notices & Announcements

Communication is the key to effective team collaboration. Team Notices & Announcements provides a simple way for the project manager (or any team member if authorized your administrator) to broadcast announcements or notices to all team members. An automatic email alerts team members of new notices or announcements.

Large project teams that are further divided into task teams may establish separate Team Notices and Announcements for each task team.

A summary of a notice can be added to the home page. Clicking on the summary entry will provide additional details.

| Most Used Commands | |
|--|--|
| Team Notices > New Item | Add a new item |
| Team Notices > Filter | Limit the displayed information based on criteria you specify |
| Team Notices > Export | Initially downloads an <i>Excel web query</i> file that permits automatic updating of the spreadsheet from the project web every time the Excel file is opened |
| Team Notices > Subscribe | Sets email notification of new or changed notices |
| Team Notices > Modify Settings and Columns | Changes the properties of the list, including name, description, columns, views and other settings |

Events & Calendars

Maintaining a project calendar is simple with IntelligentBiz. Everyone has visibility into coming events and an overview of interrelated activities. Team members can enter new events and all team members are instantly notified of the new or changed activity. Team members can choose from two views: the **Events List** and the **Calendar View**.

IntelligentBiz project calendars can also be integrated with team member's Microsoft Outlook calendar with a single click.

| Most Used Commands | |
|--------------------------------------|--|
| Events > New Item | Add a new item |
| Events > Filter | Limit the displayed information based on criteria you specify |
| Events > Export | Initially downloads an <i>Excel web query</i> file that permits automatic updating of the spreadsheet from the project web every time the Excel file is opened |
| Events > Subscribe | Sets email notification of new or changed notices |
| Events > Modify Settings and Columns | Changes the properties of the list, including name, description, columns, views and other settings |

Contacts

Up to date, accurate contact information is critical to project collaboration. Team members can add or update contact information by uploading from Microsoft Outlook or compatible contacts lists, or enter information manually. If you need to send an email to a team member - just click on their contact listing and your email application will open already properly addressed. Using IntelligentBiz, you don't have to maintain a separate project contact list, we do it for you.

| Most Used Commands | |
|--|--|
| Contacts > New Item | Add a new item |
| Contacts > Filter | Limit the displayed information based on criteria you specify |
| Contacts > Export | Initially downloads an <i>Excel web query</i> file that permits automatic updating of the spreadsheet from the project web every time the Excel file is opened |
| Contacts > Subscribe | Sets email notification of new or changed notices |
| Contacts > Modify Settings and Columns | Changes the properties of the list, including name, description, columns, views and other settings |

Discussion Boards

Team Discussions is a powerful discussion application that permits team members to exchange ideas, comment on activities or provide comments on documents. You can create as many discussion boards as you like. Each board can accommodate an almost unlimited number of threads and messages. You can sort and present messages any way you like, and purge old messages automatically. Any team member may begin a new discussion topic. Subscribers are notified by email when discussion topics are updated.





Team discussions work at any level of your project, from the overall project, to coordination between two individual contributors.

| Most Used Commands | |
|--|--|
| Discussion Boards > New Discussion | Initiate discussion on a new topic |
| Discussion Boards > Filter | Limit the displayed messages based on criteria you specify |
| Discussion Boards > Subscribe | Sets email notification of new or changes to discussion topics |
| Discussion Boards > Subject Titles | Click any entry to display details |
| Discussion Boards > Subject, Modified By, & Modified | Click on column heading to sort the display on that column |
| Discussion Boards > <i>selected discussion</i> > Reply | Create a new message that responds to the current one |
| Discussion Boards > <i>selected discussion</i> > Edit Item | Modify the current message |
| Discussion Boards > <i>selected discussion</i> > Delete Item | Delete the current message (permission required) |
| Discussion Boards > Modify Settings and Columns | Changes the properties of the discussion board: name, description, columns, views and other settings |

Surveys & Polls

If you need to quickly get answers from all team members, quickly post a poll or survey - one question or dozens of questions. Team members are instantly notified by email to respond to the poll or survey. Get graphical results (e.g. bar, pie or other charts) to yes-no or multiple choice questions automatically. Send results to team members. A great way to collect information, opinions or answers to action items.

There are four basic steps:

-  Decide what questions to ask
-  Construct a form for team members to enter data
-  Publish the survey or poll for response
-  Analyze results

To begin select **Create > Survey** and enter the following information:

| Enter Initial Data to Create a Survey | |
|--|---|
| Name | Give the survey or poll a name |
| Description | Explain the purpose (optional) |
| Display This Survey On The Quick Launch Bar? | Select yes or no |
| Show Username in Survey Results? | Yes, if you want respondent identified, No to keep names private |
| Allow Multiple Responses? | Yes, to allow the same person to respond multiple times, No to restrict to one response |
| Next > | Moves to Create New Question page |
| Question & type | Enter question, type (text, choice, yes/no, etc) and settings |
| OK > | Moves to Status/Assessment page |
| Subscribe > | If you want email notice whenever someone completes a survey or poll |
| Show A Graphical Summary > | Display graphical summary of responses (choice, yes/no questions) |
| Show All Responses | Display all responses including text/narrative responses |




Sharing Documents

Document sharing is accomplished by uploading, downloading or accessing documents placed in document libraries. A central library can be established (*shared documents* by default) or a nearly infinite number of hierarchical libraries and folders may be used, similar to a Windows™ file structure. Creating new libraries and folders “on-the-fly” provides great flexibility. Learn more about document management later in this chapter.

A document library or folder includes a menu for selecting views: **All Documents** or **Folder View** (similar to Windows™ folder view). You can create additional views using the **Modify Settings & Columns**.

How Document Libraries Work

There are three main components:

-  Folders – where all documents reside (the default folder is *Shared Documents*)
-  Lists - database tables – that record additional information about each document in the library
-  A series of web pages that update the document library, perform queries, etc.

| Most Used Commands | |
|-----------------------------|--|
| Search Documents > | Locate documents containing a selected word or phrase |
| New Document > | Begin editing a new document you plan to store in this library (uses Word as default) |
| Upload Document > | Displays Upload Document page |
| Filter | Limits document list based on criteria you select |
| Subscribe > | Request email notification whenever a team member changes the content of a document or folder |
| Send For Review > | Send email to anyone you specify asking them to review the document |
| Discuss > | Open the current document for review and annotation |
| Edit In > | Start application associated with document (e.g. Word) |
| Modify Settings & Columns > | Modify name of library, its assigned template, etc. Select optional fields like product version, document version, customer, modified by, etc. |

Subscribing for Instant Notices

IntelligentBiz SharePoint Team Services™ provides for automatic email notification of new entries or changes to nearly every list, database or document. Team members may subscribe to those databases they wish to monitor, or which are pre-set by the system administrator during account set up.

Select **Subscribe** on any page to display the New Subscription page, then enter your subscription information: notification criteria, email address, etc.

Task Assignments & Progress Reporting

IntelligentBiz Tasks & Assignments uses the lists and databases functions to provide a convenient method for reviewing active tasks, and a means for assigning new tasks to team members. Users may add a new task and assign it to a team member or members, and they will be notified by email. Team members may also use this function to review progress on tasks.

| Most Used Commands | |
|-------------------------------------|--|
| Tasks > New Item | Add a new item |
| Tasks > Filter | Limit the displayed information based on criteria you specify |
| Tasks > Export | Initially downloads an <i>Excel web query</i> file that permits automatic updating of the spreadsheet from the project web every time the Excel file is opened |
| Tasks > Subscribe | Sets email notification of new or changed notices |
| Tasks > Modify Settings and Columns | Changes the properties of the list, including name, description, columns, views and other settings |

Document Management

Document Management is IntelligentBiz strong suite. The IntelligentBiz document libraries provide start-up libraries into which files can be uploaded, stored and downloaded. By default, files include filename, author, reviewers and last modified date, but additional parameters can be set by the administrator. Team members may create new documents, and new folders on-the-fly providing versatility in document management.

The most powerful features of SharePoint Team Services™ are fully integrated with Microsoft Office XP. However, project teams may select any office application standard for document exchange, or may upload documents in HTML format to permit users to review and edit using a browser.

Version Control

Microsoft has closely integrated SharePoint Team Services™ with Microsoft Office XP or Microsoft Word 2002, PowerPoint 2002, Access 2002 or Excel 2002. Users of these applications may open and review documents within the Document Management system without downloading using an integrated document check in – check out system. This assures that other team members cannot access the file at the same time, providing automatic version control. While this provides an excellent sequential approach for document review, it may be considered a disadvantage when reviews must occur in parallel due to time constraints, such as short-duration proposal work. For parallel reviews it is better to use the track changes and comments tools embedded in Office XP (and earlier versions of Office) and similar applications.

Files created and edited with older Microsoft or non-Microsoft applications must download files for review using their embedded version control tools (such as *tracked changes* in Microsoft Word), or by renaming files using an acceptable scheme.

As a third alternative, files may be saved and uploaded in HTML format and reviewed and edited in the user's browser directly in the site.

| Most Used Commands | |
|-----------------------------|--|
| Search Documents > | Locate documents containing a selected word or phrase |
| New Document > | Begin editing a new document you plan to store in this library (uses Word as default) |
| Upload Document > | Displays Upload Document page |
| Filter | Limits document list based on criteria you select |
| Subscribe > | Request email notification whenever a team member changes the content of a document or folder |
| Send For Review > | Send email to anyone you specify asking them to review the document |
| Discuss > | Open the current document for review and annotation |
| Edit In > | Start application associated with document (e.g. Word) |
| Modify Settings & Columns > | Modify name of library, its assigned template, etc. Select optional fields like product version, document version, customer, modified by, etc. |

Using Web Discussions for Document Review

Web Discussions provide a way to add comments (“sticky notes”) to a document and share those notes with team members – without making changes to the document. SharePoint Team Services™ supports web discussions. Refer to the HELP section of your project site for instructions on how to use this feature. Web discussions should not be confused with **Discussion Boards** discussed elsewhere.

Site Management

Roles and Rights

When you join an IntelligentBiz Virtual Team Collaboration Services project website, you are assigned rights. By default, rights are organized in the following roles, where each role includes the rights of the role that precedes it:

| Roles & Rights | |
|---|---|
| Browser | - View lists, document libraries, and discussion boards in the team website |
| Contributor | - View lists, document libraries, and discussion boards in the team website - Participate in discussions - Subscribe |
| Author | - View lists, document libraries, and discussion boards in the team website - Participate in discussions - Subscribe - Add, edit, and delete items in lists - Add, edit, and delete files in document libraries - Respond to surveys |
| Advanced Author | - View lists, document libraries, and discussion boards in the team website - Participate in discussions - Subscribe - Add, edit, and delete items in lists - Add, edit, and delete files in document libraries - Respond to surveys - Create, modify, and remove lists, document libraries, discussion boards, and surveys |
| Administrator | - View lists, document libraries, and discussion boards in the team Website - Participate in discussions - Subscribe - Add, edit, and delete items in lists - Add, edit, and delete files in document libraries - Respond to surveys - Create, modify, and remove lists, document libraries, discussion boards, and surveys - Modify a team Website using a SharePoint Team Services-compatible - - web page editor, such as Microsoft FrontPage - Create, rename, and remove team Website - Add new users - Configure roles and rights |
| The rights are hierarchical, e.g. if you have the right to create document libraries, you also have the right to add files to document libraries. | |


The administrator of your team website can organize the rights into different roles or create new roles to organize rights in a customized manner.

Permissions


You may change permission settings for a list, document library, discussion board, or survey. When you create a list, document library, discussion board, or survey, you have control over the access to the information. You can control which items team mem-

bers can read or edit, and whether or not they can change the design of the list, document library, discussion board, or survey.

The following permission settings apply to team members who have explicit site-wide permission to read or edit content. If your website can be accessed anonymously, these settings apply to anonymous users only if you grant them rights greater than the Browser role. Users with Administrator role can read and edit all content, regardless of the permission settings of a particular list, document library, or survey. Some examples follow.

 **Events & Calendars** - If you are managing a schedule for a project, you might want to be the only one who can add or edit items, although you would want all team members to be able to view all the items. The security settings for such an events list would be:


- Read access: All items
- Edit access: None
- Design access: Only the creator of this list

 **Contacts** - In a list of contacts, you might want all team members to be able to read and update all the items. The security settings for such a list would be:

- Read access: All items
- Edit access: All items
- Design access: Only the creator of this list

 **Discussion Boards** - In a discussion board, you probably want all team members to be able to read all the comments, but you don't want them to be able to edit each other's comments. The security settings for such a discussion board would be:

- Read access: All items
- Edit access: Only their own
- Design access: Only the creator






 **Document Library** - In a document library, you might want team members to be able to add their own custom properties so that they can store information that you hadn't anticipated when you created the document library. The security setting for such a document library would be:





- Design access: Everyone

Team members must have the Advanced Author role or higher to modify the design of a list, document library, discussion board, or survey.

Permissions are hierarchical. That is, if you give team members permission to edit all items, you have also given them permission to read all items. Similarly, if you give all team members permission to modify columns and views, you have given them permission to read and edit all items.

Setting or Modifying Permissions

-  Go to the Customize page for the list, document library, discussion board, or survey.
-  On the top link bar, click Lists to go to a list or survey, click Documents to go to a document library, or click Discussion Boards to go to a discussion board.
-  Click the name of the component that you want to change permissions for.
-  On the page where the component is displayed, click Modify settings and columns.
-  **Note** If the page displays a survey, click Modify survey and questions.

-  On the Customize page, click Change general settings.
-  In the Security section for the list, document library, discussion board, or survey, specify permissions.
-  **Note** In a document library, the only permission setting you can make is for design access.
-  At the bottom of the page, click OK.

Invitations

During initial provisioning and account setup, one or more project team members are given initial usernames and passwords and are assigned permission levels (typically the project manager and perhaps an administrator). Additional members are added by using the **Send An Invitation** command. This will run a wizard that gives team members access to the IntelligentBiz Virtual Team Collaboration site and send them an e-mail describing the website and invites them to participate.

Site Settings

SharePoint Team Services™ configurations are extremely flexible. Modification of the site is determined by permission level.

| Most Used Commands | |
|----------------------------------|--|
| Change Site Name & Description > | Self explanatory |
| Customize Home Page > | Permits selecting items and their positions on the home page |
| Manage Users > | Add, remove or change the roles of users |
| Edit My Information > | Displays personal settings: name, email address, password, subscriptions, etc. |
| View My Information | Display a list of users |
| Modify Site Content | Customize site content |

Virtual Project Management

There are two important aspects of IntelligentBiz Virtual Project Management Services – technical management and schedule-cost management.

Management of a typical project involves a tremendous number of activities that must be coordinated between the technical staff that will perform the various tasks and the managers who will be concerned about overall performance, schedule and cost. In many instances your customer may also be involved. The strength of IntelligentBiz lies in our ability to facilitate activities across all aspects of a project. We show how our tools are typically applied in the following table.

| Activity | SharePoint Team Services | Project 2000/2002 | Project 2002 Server | Simplified Services |
|--|-------------------------------------|-------------------------------------|---------------------|---------------------|
| Project Planning | | | | |
| Requirements analysis | <input checked="" type="checkbox"/> | | | |
| Project definition & objectives | <input checked="" type="checkbox"/> | | | |
| Project methodology | <input checked="" type="checkbox"/> | | | |
| Detailed task definition | <input checked="" type="checkbox"/> | | | |
| Deliverables definition | <input checked="" type="checkbox"/> | | | |
| Create work breakdown structures (WBS) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Resource requirements & staffing | <input checked="" type="checkbox"/> | | | |
| Dynamic resource allocation/optimization | | <input checked="" type="checkbox"/> | | |
| Modeling & scenario analysis | | <input checked="" type="checkbox"/> | | |
| Critical path analysis | | <input checked="" type="checkbox"/> | | |
| Interactive project planning help | | <input checked="" type="checkbox"/> | | |
| Gantt charts | | <input checked="" type="checkbox"/> | | |
| Project calendars | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |

| Activity | SharePoint Team Services | Project 2000/2002 | Project 2002 Server | Simplified Services |
|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Project Operations | | | | |
| Task worksheets | <input checked="" type="checkbox"/> | | | |
| Resource availability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Resource assignment | <input checked="" type="checkbox"/> | | | |
| Work calendars | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Dynamic resource allocation | | <input checked="" type="checkbox"/> | | |
| Team collaboration | <input checked="" type="checkbox"/> | | | |
| Document reviews | <input checked="" type="checkbox"/> | | | |
| Report generation | <input checked="" type="checkbox"/> | | | |
| Progress reviews | <input checked="" type="checkbox"/> | | | |
| Deliverable reviews | <input checked="" type="checkbox"/> | | | |
| Tracking & Reporting – Cost & Schedule | | | | |
| Project progress analysis | | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Schedule reporting - Gantt charts | | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Labor hour tracking | | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Materials tracking | | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Cost reporting | | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Task manager and user access to MS Project capabilities | | | <input checked="" type="checkbox"/> | |

When to select what services? The complexity of your project, the number of team members and their locations, the number of companies involved, the level of cost and schedule reporting required, the level of access to detailed financial reporting data, etc., all have an impact on the best selection. In the following paragraphs we provide thoughts on selecting the services you require.

Using Microsoft Project 2000/2002

Microsoft Project is our recommended tool for Virtual Project Management – with its powerful planning, analysis and reporting tools. However, the level at which it is deployed is determined primarily by the management reporting requirements of the project.

A single Microsoft Project user (typically the project manager or appointed administrator or both) is adequate for many projects for project planning and schedule tracking. Inputs can be imported into Microsoft Project from documents uploaded to the Virtual Team Collaboration website by team members, and reports can be exported to the website for review and progress reporting. When a single focal point exists for project

planning, and schedule and cost reporting this approach is more than adequate – and simplifies training in that only the project manager (or appointed administrator or both) has to have working knowledge of Microsoft Project. Familiarity with Microsoft Project is an important issue for some companies – few companies have “power” users who can be assigned to projects. Simple labor hour and materials tracking and reporting can be accomplished with IntelligentBiz Simplified Services and input to Microsoft Project (and distributed to team member companies) without the complexity of Project Server nor the costs of Project Client Access Licenses.

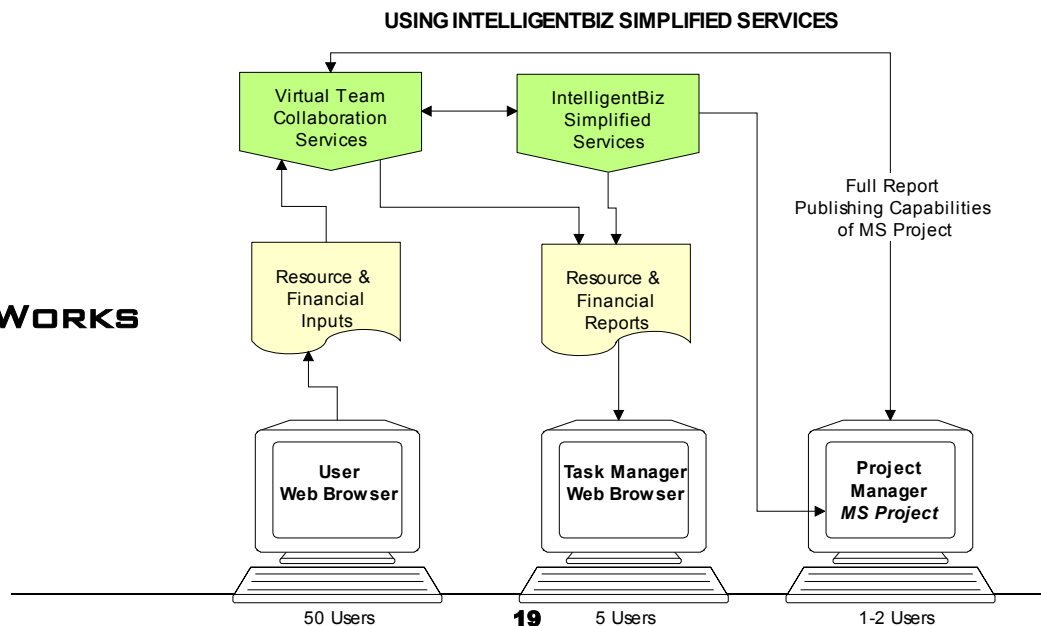
On the other hand, should your project be complex and require close coordination by various managers through multiple Microsoft Project user installations, it is better to employ Microsoft Project Server 2002 to provide a central Project Server database for schedule and resource tracking.

Not a Microsoft Project Expert?
 IntelligentBiz can provide project planning and/or tracking and reporting services if you choose, or set up and transition services to your project team – giving you a way for rapid project start-up using the powerful tools in Project.

Using IntelligentBiz Simplified Services

IntelligentBiz recognizes the difficulty of collecting labor and materials expenditures for a project team that spans multiple companies with separate financial reporting systems. Our Simplified Services provide a simple solution for capturing resource consumption (timecard and materials), and reporting. – using the Virtual Team Collaboration website.

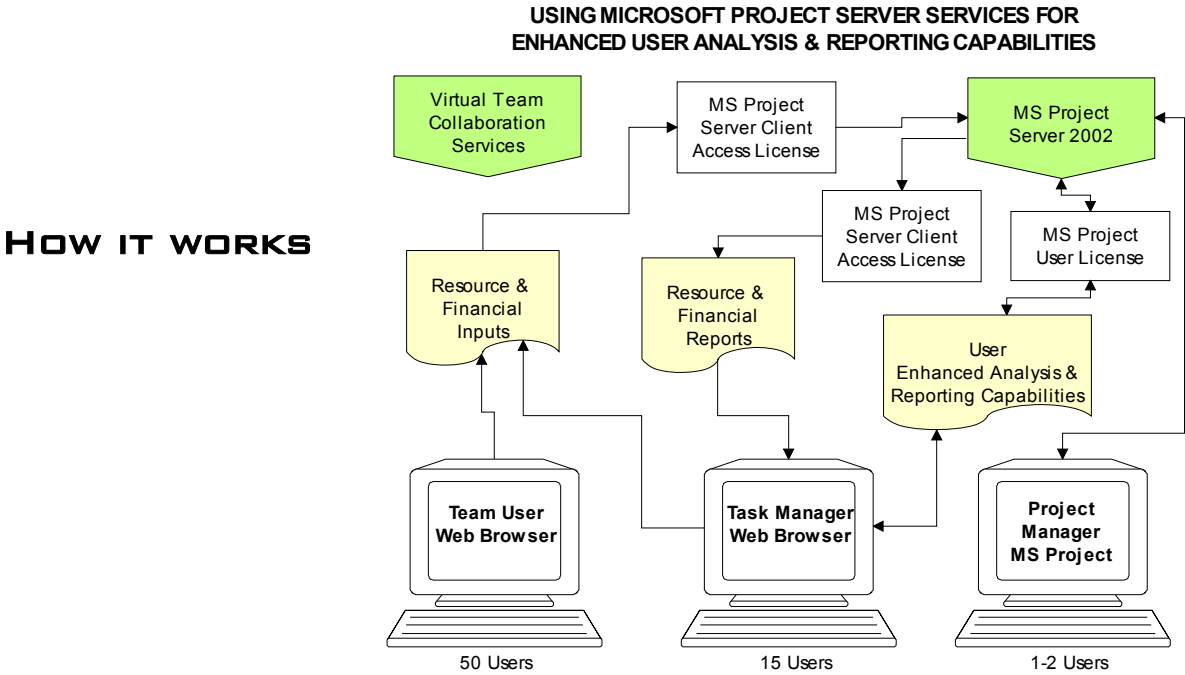
HOW IT WORKS



Additionally, Simplified Services are extremely versatile – offering many options for tailoring, e.g. direct file transfer to your corporate financial management system, etc.

Using Microsoft Project Server 2002

Microsoft Project Server 2002 is required for providing real-time access to the Microsoft Project databases by multiple users.



This deployment requires Server Access Client Licenses for each user along with a Project Server license.

Provisioning & Set Up

This chapter provides instructions and checklists for provision and set up of IntelligentBiz services.

A key advantage of IntelligentBiz is the rapid provisioning and setup of services – just a few hours for Virtual Team Collaboration Services, and as little as a day for Microsoft Project Server and IntelligentBiz Simplified Services.

In the following sections we provide the worksheets for provisioning and setting up your IntelligentBiz services.

General Account Information

| General Account Worksheet | |
|---------------------------|---|
| Company name | |
| Company address | |
| Account manager | |
| Telephone | |
| Telefax | |
| Email | |
| Method of payment | <input type="checkbox"/> Purchase order <input type="checkbox"/> Credit card <input type="checkbox"/> Check |
| | |
| | |

Virtual Team Collaboration Services

The following information is required for initial provisioning and set up of services

| Services Worksheet | |
|-------------------------------------|--|
| Maximum number of users | |
| Expected period of operation | |
| Preferred site name | yourpreferredsitename (TCP/IP sub address) |
| Preferred proper name | Your Company XYZ Project Team Website |
| Project manager information: | |
| Project manager name | John Doe |
| Preferred username | johndoe |
| Initial password | fastdeer105 |
| Email address | doej@mycompany.com |
| Telephone | |

Virtual Project Management

| Services Worksheet | |
|--|------------------------------|
| Number of MS Project users | |
| Expected period of operation | |
| IntelligentBiz Simplified Services users | |
| Project Server 2002 users | |
| First MS Project setup by IntelligentBiz | <input type="checkbox"/> Yes |
| MS Project operations by IntelligentBiz | <input type="checkbox"/> Yes |

Technical Support

IntelligentBiz has made every effort to provide simple, trouble-free services.

IntelligentBiz technical services are shown in the accompanying table.

| Technical Services | |
|---|--|
| Website hosting and network administrator | Available 24/7 See IntelligentBiz.com website |
| Virtual Team Collaboration and Project Management help desk | 9:00am-5:00pm weekdays. See IntelligentBiz.com website |
| Project management system consulting services | Available. See IntelligentBiz.com website |
| Microsoft Project Setup or Training | Available. See IntelligentBiz.com website |