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Microsoft Office
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Enterprise Project Management Solution

Project Initiation with Project Server, InfoPath and Windows SharePoint Services

Microsoft InfoPath can be integrated with Microsoft Project Server and Microsoft Windows SharePoint Services to initiate projects (without Microsoft Project Professional) and automate manual processes.

InfoPath Workflow Forms

A set of InfoPath forms is used to enforce the workflow required to initiate projects. The step-by-step forms change dynamically based on values selected (i.e., fast-track projects may skip steps but will capture data required for audit purposes).

The forms can also be used to require certain data for certain types of projects (i.e., projects over 6 months in Duration require Executive approval; projects including IT resources require CIO approval). In addition, forms could be used to manage the full lifecycle of a project.

Windows SharePoint Services Integration

A Windows SharePoint Services site hosts all project initiation requests, displaying the status of all projects in the initiation queue as well as items awaiting further user input. The InfoPath forms are accessible via SharePoint and the data within the forms is available to SharePoint to provide seamless report views.

Project Server Integration

InfoPath value lists are populated by lookup tables in Project Server. By leveraging Project Server, there is little maintenance in the InfoPath solution. As soon as an administrator adds a new value to a lookup table in Project Server, the value is immediately available in the InfoPath forms.

Approved projects are automatically created in Project Server and the related SharePoint site is automatically generated. The InfoPath form contains independent actions to select the enterprise project template and the SharePoint site template to be used for the project.

In addition, enterprise resources are populated in projects, and the system automatically grants those resources access to the project's SharePoint site.

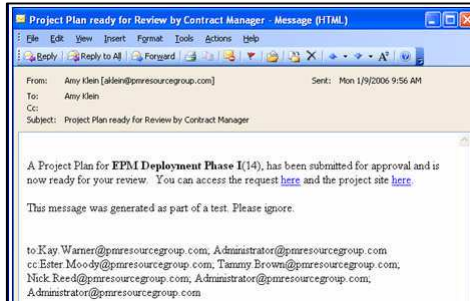# Project Initiation Solution Core Capabilities

The core capability provided by InfoPath is the ability to automate manual forms and allow data to be pushed to and pulled from various sources. Integrating InfoPath with Project Server for Project Initiation (and other workflow automation) offers the following functions:

Validation
The process is security-driven so that only specified users can perform certain actions. A user with appropriate permissions can access a SharePoint site to begin the project initiation process, or take the project to the next step in the process. In addition, InfoPath can enforce fields that are only required for certain types of projects.

Email Alerts
As a project request moves from one step to the next, the appropriate person is notified via email. This can also be set (using a simple SharePoint list) to email a group of people based on specific actions. The email content can also be customized.

Collaboration
Project Initiation can be used to enforce an organization's workflow with an automatic process to create projects and sites from templates. Each projects' SharePoint site is created from a template selected in the InfoPath form. The site dashboard can include milestones and change requests pending approval. Each site is created with standard document folders to better organize project documents.

Automatic workflow enforcement
Automate manual processes using step-by-step forms. One step cannot be completed until all preceding steps are complete, and the system date stamps all actions and includes a rejection process.

Please contact us for additional information about this or other enterprise project management consulting and education solutions provided by PM Resource Group.

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PM Resource Group specializes in the implementation of enterprise project management solutions using Microsoft technologies to enable organizations to meet their goals.

*Our **service offerings** include EPM solution definition, implementation and support, business process definition and automation, and customization of the EPM solution. For more information, see http://www.pmresourcegroup.com/epmgtm.htm.*

*Our **education solutions** include public and private courses related to mastering Microsoft Office Project Server 2003. Private courses are delivered onsite and customized per the specific EPM solution deployed. Role-based courses can be taken as a stand-alone class or combined as part of an **EPM Black Belt** certification track. Boot camps are also offered for fast-track learning. For more information, see http://www.pmresourcegroup.com/training.htm.*

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