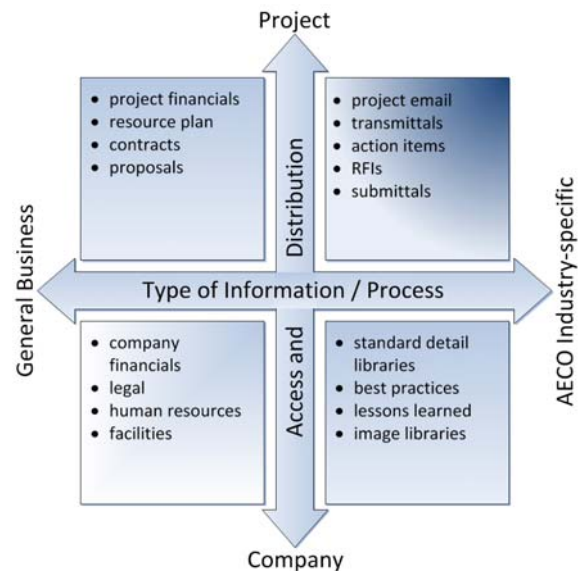


## Microsoft SharePoint and Newforma Project Center

AECO firms (architects, engineers, construction firms, owners) must deal with a large volume and wide variety of specialized and often highly technical information that must be shared, as appropriate, both within their company and with a wide range of external consultants working on any one project. Forward-thinking AECO firms have adopted various software solutions to meet these unique challenges, including Microsoft SharePoint and Newforma® Project Center. Understanding the relative positioning of these two tools, in particular, is an important part of an AECO firm’s overall information management strategy. This paper provides a useful framework for evaluating the most appropriate application of these solutions based on feedback from a number of Newforma customers who have extensive experience implementing both SharePoint and Newforma Project Center in their firms.

When considering the relative position of Microsoft SharePoint and Newforma Project Center, it is useful to think of an AECO firm’s information management challenges mapped in two dimensions as shown in the figure at right. The horizontal axis represents the types of information and processes being managed, ranging from company-wide general business information on the left, to industry best practices and project specific information on the right. The vertical axis is the organizational context used to determine the access to and distribution of information, ranging from a person’s functional role in the company at the bottom, to a person’s specific role in a project, including external project team members outside the company.



Examples of common work processes and types of information that AECO firms must deal with are shown in each quadrant of this diagram. It is useful to examine some of these work processes and the lessons learned by Newforma customers experienced with both SharePoint and Newforma Project Center to see the pattern of usage that has emerged in their firms.

Newforma customers commonly identify four key project information management challenges:

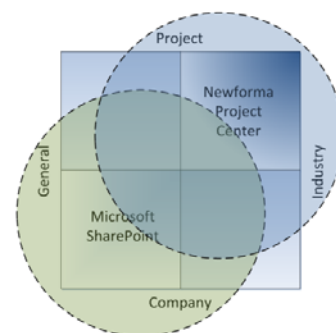
- Email management
- Finding information on their networks
- File sharing and transfer with external team members
- Work process support

A comparison of Microsoft SharePoint and Newforma Project Center and the ways they are commonly applied in addressing these challenges relative to this framework is shown in the following table:

## Comparison of SharePoint and Newforma Project Center

SharePoint	Newforma Project Center
<b>Email management</b>	
<ul style="list-style-type: none"> <li>▪ <b>General business email</b> <ul style="list-style-type: none"> <li>• Integration with Outlook</li> <li>• Supports general business work processes</li> <li>• Functional context</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Project Email</b> <ul style="list-style-type: none"> <li>• Integration with Outlook; support for alternate email environments</li> <li>• Support for project work processes</li> <li>• Project context</li> <li>• Controlled access for external project team members</li> </ul> </li> </ul>
<b>Finding information</b>	
<ul style="list-style-type: none"> <li>▪ <b>SharePoint Search</b> <ul style="list-style-type: none"> <li>• Enterprise search</li> <li>• Limited support for AECO-specific file formats</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Project Search</b> <ul style="list-style-type: none"> <li>• Enterprise search with project context</li> <li>• Extensive support for AECO-specific file formats, incl. x-refs</li> <li>• Sort / Filter / Preview results to obtain useful information</li> <li>• Manage related Items</li> <li>• Search off-line (archived) projects</li> </ul> </li> </ul>
<b>File sharing and transfer</b>	
<ul style="list-style-type: none"> <li>▪ <b>SharePoint</b> <ul style="list-style-type: none"> <li>• Strong integration with Microsoft Office promotes internal sharing of information</li> <li>• Concerns for security, licensing cost and complexity when sharing is extended to external project team members</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Newforma Info Exchange</b> <ul style="list-style-type: none"> <li>• Strong integration with project work processes</li> <li>• Project context</li> <li>• Simple administration and licensing, incl. external project team members</li> <li>• Full audit trail</li> <li>• Supports sharing information with internal and external team members</li> </ul> </li> </ul>
<b>Work process support</b>	
<ul style="list-style-type: none"> <li>▪ <b>SharePoint workflow</b> <ul style="list-style-type: none"> <li>• Flexible support for general business processes</li> <li>• Extensive customization required to support AECO domain and project processes</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Contract administration</b> <ul style="list-style-type: none"> <li>• Project context</li> <li>• Extensive support for common AECO project delivery work processes without customization</li> <li>• Preconfigured best practices drive accountability</li> <li>• Logs provide project history and transparency</li> </ul> </li> </ul>

The proposed framework, illustrated at right, reflects the prevailing practices that have evolved in firms that have implemented SharePoint and Newforma Project Center. In short, information and processes that are closely related to the AECO industry domain and that span the extended project team are addressed most effectively through Newforma Project Center. Conversely, SharePoint is often a good fit for general business information and processes that operate primarily within the context of the company.



Although there is occasionally some overlap in the usage of SharePoint and Newforma Project Center, there was clear consensus among the firms interviewed that Newforma Project Center is the cornerstone of their Project Information Management (PIM) strategy. The most common reasons cited are:

**Security:** If SharePoint is being used to support general business processes within the company, many Newforma customers expressed a concern for security and IT administrative burden in admitting external project team members to their internal systems. By contrast, Newforma Project Center is segmented between internal and external access through Newforma Info Exchange, providing security for internally-held information and simple management of secure access for external project team members. Minimizing the IT burden associated with management of external project team members is crucial; it is not uncommon for external project team members across all projects to number in the thousands for a firm with only a hundred employees / internal project team members.

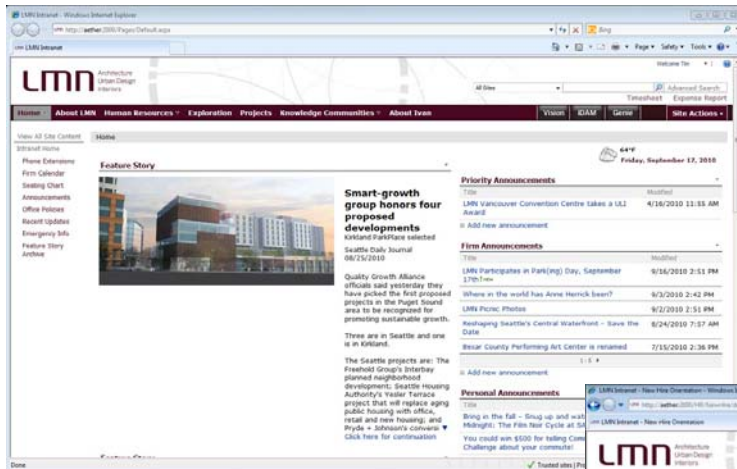
**Licensing:** The cost and complexity of licensing to accommodate external project team members is another factor that has often limited the application of SharePoint to access by a firm's employees. By contrast, access to published project information by external project team members through Newforma Info Exchange requires no additional licenses and is simple to administer.

**Project Context and Scalability:** Although SharePoint's enterprise search is capable of scaling across most firms' information assets, the lack of project context makes this search less useful for project team members. Typically, Newforma customers manage gigabytes of general business information via SharePoint and terabytes of project information via Newforma Project Center. The project context provided by Newforma Project Center segments project information and enables project team members to focus on the information most relevant to them, while still enabling them to mine other projects for best practices and institutional knowledge through the simple selection of the scope of Project Search. Project context also simplifies the archiving of projects at their completion, capturing current global and project data in the archive, permitting the entire project to be restored at a later date in the event of re-activation of the project or legal challenge.

**Customization:** Finally, although SharePoint provides a general workflow support capability, implementing this capability for the industry-specific work processes common in AECO projects typically requires an enormous customization effort. Newforma Project Center has been designed to manage domain-specific work processes and project-specific information as a purpose-built solution. Newforma

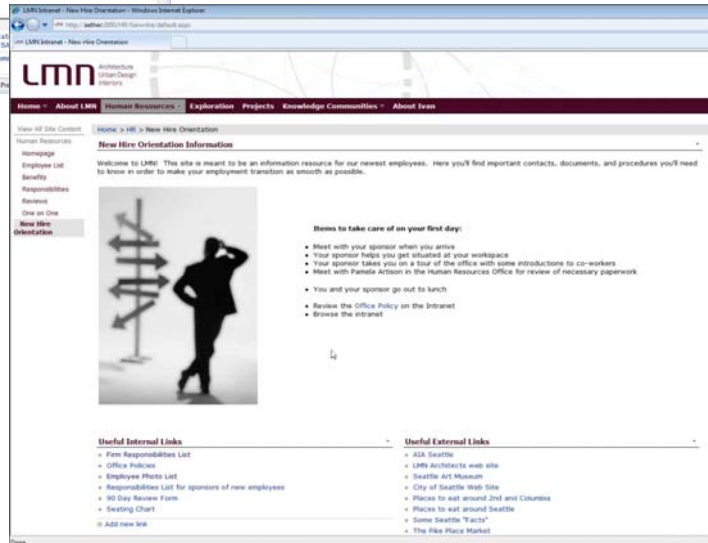
Project Center is specifically tailored to support processes such as RFIs and submittals to provide flexible yet secure access to the associated information as appropriate for internal and external project team members. By contrast, SharePoint would require extensive process analysis and design, as well as customization, documentation, testing, support and ongoing maintenance in order to effectively support this AECO-specific work process. A few customers had started down this path before they found Newforma Project Center and abandoned that approach due to the lengthy time and enormous expense required to implement a custom SharePoint-based solution.

## How Newforma Customers Are Using SharePoint Today

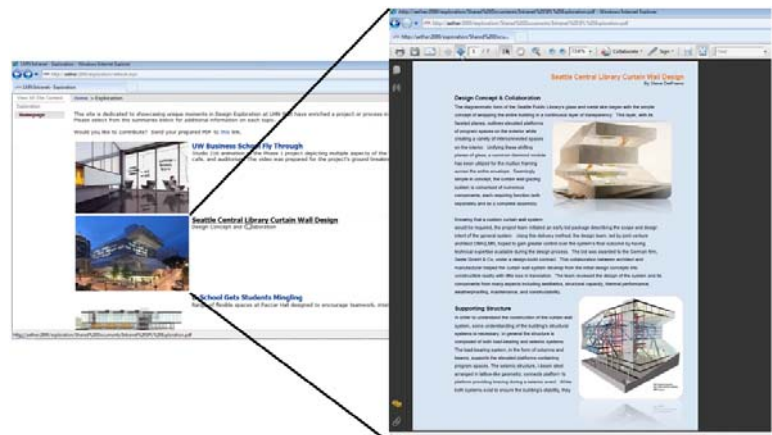


In light of the factors discussed above, a definite pattern has emerged in how Newforma customers often apply SharePoint. For many, its primary use is as the foundation of their company intranet. In this context, it is applied to provide a flexible, branded framework for internal news and communication throughout their company.

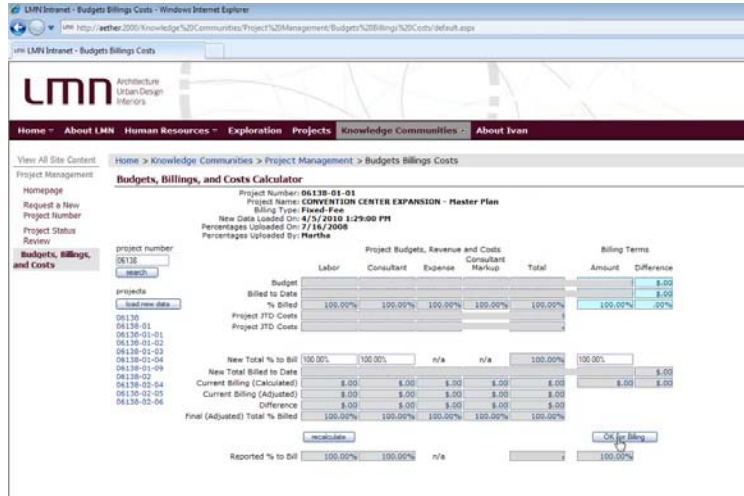
Company intranet functionality is also used to support a number of general administrative functions, such as HR, Legal, Finance, IT and others, as a repository of forms, policies, and procedures. Another common application is in business development, as a tool to capture project summary information and present images and project narratives in support of business development.



A closely related application is the capture and presentation of standards and best practices, often employing Web 2.0 functionality such as wikis and blogs, to encourage the development and maintenance of content via internal "crowdsourcing."



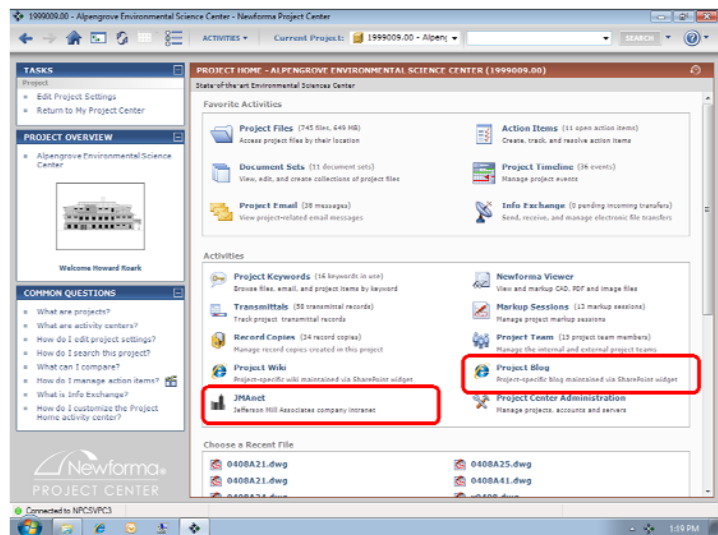
SharePoint is also commonly applied to the challenge of aggregating information from many different sources, including human resources, finance and accounting applications, and Newforma Project Center, and presenting useful views of that aggregated data for specific audiences within the company.



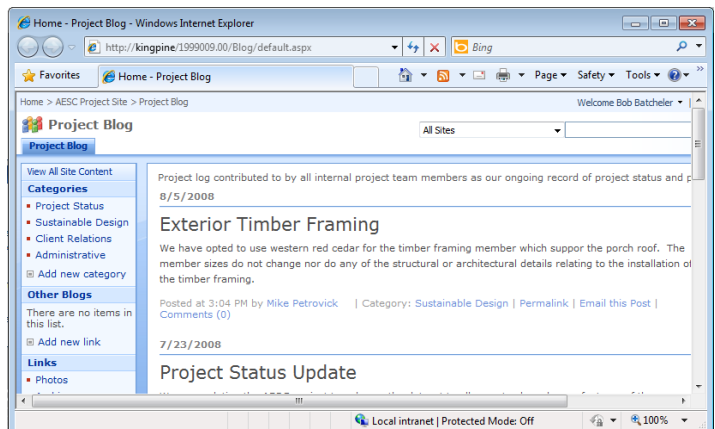
Company intranet images provided courtesy of LMN Architects, Seattle, Washington.

## Integration between SharePoint and Newforma Project Center

Integration between SharePoint and Newforma Project Center can be as simple as enabling the company intranet to be accessible from within Newforma Project Center through the creation of a custom activity center on Project Home.



Custom activity centers can also be used to access some of the Web 2.0 functionality of SharePoint, such as blogs, wikis, and threaded discussions from within the current project context of Newforma Project Center.



Similarly, in the latest release of Newforma Project Center, it is possible to embed a link in a project narrative on the company SharePoint-based intranet that launches Newforma Project Center and takes the user to a specific project, or even to a specific activity center or item within a project, enabling rich linking of information between these solutions.

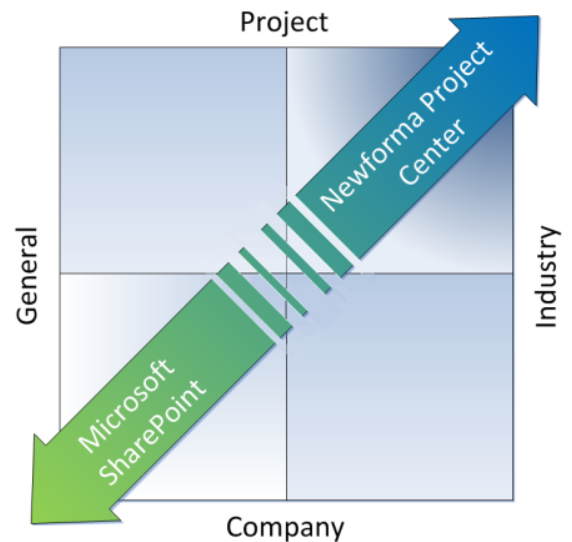
Many Newforma customers also use the project context of Newforma Project Center to assist them in managing “internal projects” such as HR recruiting, IT projects or office moves. Another example of an internal project is in the development and maintenance of standards and practices, such as standard detail libraries and specs. Many companies have found that the development of a standard reference “library project” in Newforma Project Center is an effective way to allow project teams to find applicable standards, by extending the scope of Newforma Project Search to include this standard reference library



project. This is closely related to the publishing of best practices via the company intranet, mentioned earlier as one of the applications of SharePoint. Newforma Project Center can bridge these closely related applications by permitting the scope of Newforma Project Search to be extended to the SharePoint document libraries associated with best practices published via SharePoint.

## Summary

Microsoft SharePoint and Newforma Project Center offer distinctly different, but often complementary, capabilities. The framework presented here offers a simple yet effective means to determine which solution is most appropriate to the information management challenge at hand. SharePoint has many useful applications in dealing with general business information within the company context, but the more closely related the information and processes are to the AECO industry domain and to specific projects, the more likely it is that Newforma Project Center will more closely meet the need, with quicker implementation, greater adoption and at lower total cost of ownership.



For more information, talk to your Newforma sales or account management representative, contact us at [answers@newforma.com](mailto:answers@newforma.com), or check out our website at [www.newforma.com](http://www.newforma.com).

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