

# CORRELATE for Microsoft Sharepoint Windows Services

White Paper

## Purpose

The purpose of this document is to describe the integration of Correlate and Microsoft Windows Sharepoint Services (WSS). This description includes the application components, utilization, features and all essential related information.

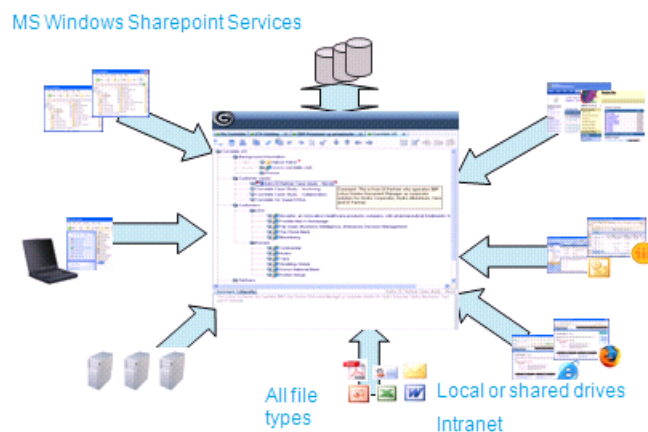
## Background

Microsoft Sharepoint SharePoint is an enterprise information portal, from Microsoft, that can be configured to run Intranet, Extranet and Internet sites. Microsoft Office SharePoint Server 2007 allows people, teams and expertise to connect and collaborate. A SharePoint enterprise portal is composed of both SharePoint Portal and Windows SharePoint Services, with SharePoint being built upon WSS. WSS is typically used by small teams, projects and companies. SharePoint Server is designed for individuals, teams and projects within a medium to large company wide enterprise portal.

WSS Microsoft Windows SharePoint Services 3.0 is the platform on which all SharePoint Products and Technologies are built. WSS 3.0 is for is suitable for small teams, projects and organizations.

WSS's project collaboration, document workspace, meeting sub-site, and discussion board features allow individuals and small teams to collaborate and share information online. Past versions of Windows SharePoint Services included Windows SharePoint Services 2.0 and SharePoint Team Services. New features in WSS 3.0 include integrated workflows, RSS feeds, blogs, wikis and ASP-style Web parts. To preview more of WSS 3.0's new features visit the [Microsoft Windows SharePoint Services 3.0 demo](#).

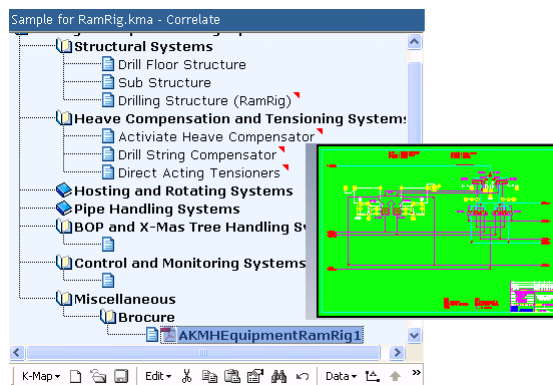
SharePoint sites are made up of Web Parts and Windows ASP.NET-based components. Web Parts are designed to be added to pages and configured by site administrators and users, creating complete page-based applications. Windows SharePoint Services ships with a number of ready-to-use Web Parts; more will be available in the future from Microsoft and third-party vendors.



Correlate bridges the gap between knowledge management as it stands today, and the enterprise solution it was meant to be. Correlate assembles an organized view of documents in a business process requiring multiple, disparate documents and information from across the organization. In addition, best practices and corporate knowledge are captured in the Correlate template, reducing redundancy, increasing efficiency and streamlining the process.

Correlate provides a tree like structure that ties together any number of documents, from a number of sources with hyperlinks, texts and images to one coherent workable view. Correlate allows end users to see the context of information within others, and then perform all management actions from within that context.

To capture existing knowledge and practices in the organization, Correlate templates are pre-defined Correlate files that could be used again and again and a foundation to other Correlate files. These templates are used as process roadmap.



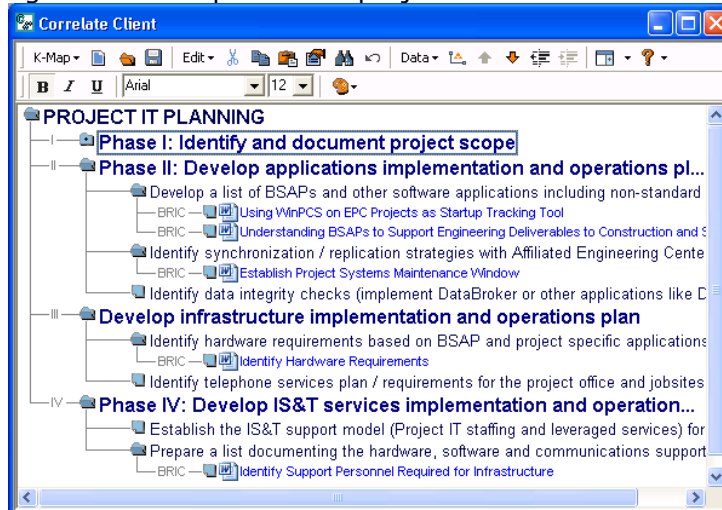
The Correlate tree walks the users through the project phases, providing a complete picture of what was done, being worked on, and what work still needs to be dealt with. By using templates, starting a process is as easy as calling the right template and the process is mapped out and ready to begin.

## ***Correlate for Sharepoint identifies and solves these major areas in Windows SharePoint Services:***

**Process mapping** Windows SharePoint Services portals are workgroup established ad-hoc web sites for teams to finish a given project. A Correlate structure will lead the project team through the different phases of the project and shorten the project time, eliminate mistakes and enforce procedures across the organization.



**Single view of the project, not only of it's parts** The different components of the project are available in different list views across the portal, such as Library, Discussions and Calendar. With Correlate Users can define relationships between the different entities (meeting about a document, or discussions about several tasks), and can see how all these pieces link together to compound the project.



**Use the portal to access information from non-portal locations** The Windows SharePoint Services portal provides a good way to store information as documents, tasks and meetings. Even so, some information will always remain in legacy systems like e-mail, other web sites, accounting software and so on. Correlate provides a method to link from the portal to these systems.

**Same interface across the board** Windows SharePoint Services provides different user interfaces for work with Office applications, and other applications. This increases user training needs and user errors. Correlate provides a unification of the user interface and is a powerful tool that enhance the portal usability while reducing implementation costs.

**Reuse of work done in other portals** Most projects are similar, and some actually include the same information. A simple method to access and use information across projects/portals is needed. With Correlate you are able to easily draw from past projects. This spells significant time saved, the value proposition of using Correlate growing as completed tasks accumulate.

### **Portal project archiving**

After the project is complete, a simple, easy to use method is needed to replicate the entire project to one retrievable unit that could then be archived on a separate media (i.e. burned to a CD). With Correlate you can easily archive documents and entire projects.

### **Work while disconnected**

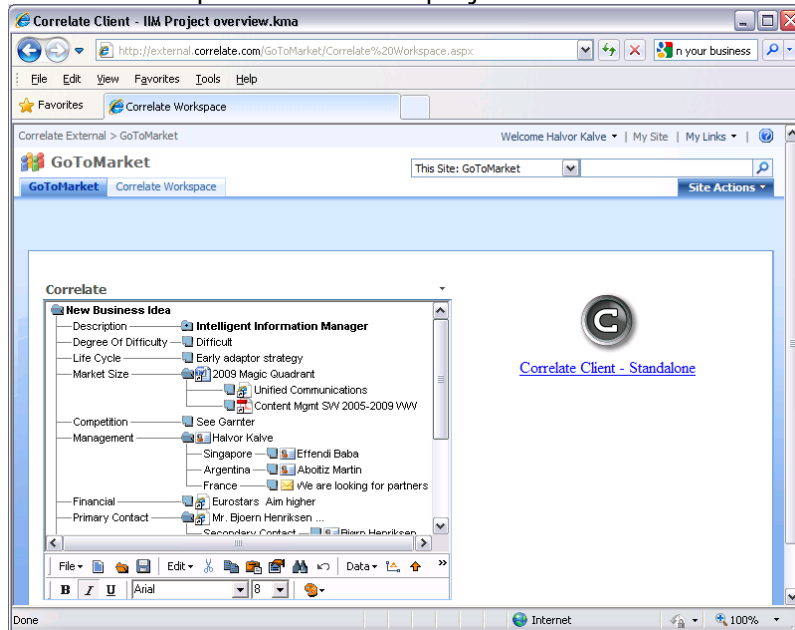
Even in this connected world, road warriors still need to do their job while not connected to the network. Windows SharePoint Services needs a method that will allow people to do their job even when the portal server is not available. Correlate provides extensive off-line support and synchronization.

### **Business Process**

The following is a description of everyday work on projects with Windows SharePoint Services and Correlate for SharePoint

## Creating a new Project Portal

When creating a new project, the project manager gets to choose from different site templates like team site, document workplace, meeting workplace and so on. This sets the kind of features and functions that the site will include, and what web parts will be displayed by default. During the site creation, a Correlate web part will be placed in the portal home page. The home page web part will open a pre-defined Correlate file that matches the portal type as defined by the administrator. This will serve as the project roadmap, and will include all parts of the new project.



## Working in a Project Portal

The project portal web site serves all members of the project team, allowing them to complete the different functions of the project. Parts of these functions could be scheduling a meeting, creating or updating a document, creating or completing a task and so on.


The Correlate project web part on the home page is one of the first things users see when going to the portal, serving both as a status view of the project, and the place where work on the project could be done. The Project Correlate file serves as a roadmap directing the users what needs to be created or updated and what was completed thus far. In the Correlate file, users will see all the pieces of the project and the relations between them, and work on a piece of the puzzle there and then.

Users will also be able to link to and work on information outside the portal, like web sites, e-mails, file system documents and images. All actions on the Correlate file could be completed in a simple Drag and Drop fashion, allowing slick and quick work to be accomplished in minimum amount of time.

As the project progresses, users may take the project Correlate structure and its content offline, to be able to work on documents, meetings and other project items as they travel with their laptop. Whether on the plane or in a conference, the project will still be available for the user to read, update and edit. When the users go back on-line, a synchronization process will take place updating both the user computer and the server with the most current information of the project.

## Taking a snapshot of the project

As the project progresses, the project manager can take snapshots of the project roadmap with its content and use that for archiving, reporting to management, or submitting to auditors or customers that do not have access to the portal. By storing the Correlate file and its content as one file on the file system, the project manager can burn the project to a CD, send it by e-mail or store it to an archiving system. Later, when the project is completed, these snapshots will serve as documentation of the work that was done, and will allow retrieval of the work as needed.

Team Correlate Welcome Halvor Kalve | My Site | My Links | 

**Correlate Workspace** All Sites

Team Correlate > Document Center > News > Reports > Search > Sites > Main Site > **Correlate Workspace** > Demo Site > Tracking > Best Tool > **Site Actions**


Team Correlate > Correlate Workspace

### Correlate Workspace






Sample project workspace for participants and readers

**PROJECT IT PLANNING**

- Phase I: Identify and document project scope
  - Description: Identify and document overall scope/issues for Project IT Plan - Obtain informati...
  - Step 1: Review PITCH for Project IT Planning resources including Mortar - BRICs - Librai...
    - Overview over digital security
    - Pitch
    - Info: Business Partner Weekly Update October 6 2008
    - Detitte er et brev
  - Step 2: Review project contract and identify terms and conditions that affect IS&T scope
  - Step 3: Review project scope book for (LSTK) projects or proposals for reimbursable pro...
  - Step 4: Prepare a list of project deliverables and file formats and note differences between...
    - Project Deliverables
    - File Formats
  - Step 5: Prepare a list of critical issues that must be resolved to ensure project success
    - Critical Issues list:
    - Issues List
  - Step 6: Prepare assumption and decisions made file - **REQUIRED**
    - BRIC: Assumptions and Decisions Made
- Phase II: Develop applications implementation and operations pl...
  - Develop a list of BSAPs and other software applications including non-standard appli...
  - BRIC: Using WinPCS on EPC Projects as Startup Tracking Tool
  - BRIC: Understanding BSAPs to Support Engineering Deliverables to Construction and Startu...



[Correlate Client - Standalone](#)

Overviews with Correlate		
Type	Name	Modified By
	Correlate 2010 action plan	Halvor Kalve
	Example for briefing book	CORRELATE\Administrator
	Presentation 17 oct 2008	CORRELATE\Administrator
	Demonstrasjon 17 okt	CORRELATE\Administrator
	Correlate K-Map Example	CORRELATE\Administrator
<input type="button" value="Add new document"/>		

## Key benefits of Correlate for Sharepoint

- Projects get completed faster
  - Correlate project templates walk the project team along the project line and make sure that all tasks, major or minor, get the right attention at the right time
  - No need to reinvent the wheel. Documents from other projects or even outside the portal could be used in the project
- Better project management achieved by seeing the whole project - as well as its parts
- Minimal delays by reducing human errors
- Higher productivity by allowing users to work anywhere, anytime
- Faster and cheaper implementation of Windows SharePoint Portal
  - By simplifying the user interface, and reducing the complexity of the portal
  - Through savings on user training and adoption, and since less support calls are generated
  -

The Correlate user interface is easy and intuitive. The tree like structure makes finding and understanding information an easy task, and working on anything found in the

Correlate is a right click away. In fact, all actions in Correlate could be done by right clicking the item, and choosing the appropriate action from the menu. Adding information to Correlate is done by simple Drag and Drop actions, making it intuitive and easy.

### ***Interface with other systems***

Correlate a Client application that runs on the client machine while the Correlate Webpart is a lightweight active X control that runs on the client machine. It exposes its functionality using a comprehensive document object model, documented in the Correlate Software Development Kit (SDK) These APIs are accessible through Java Script, VB Script, Java, C++, Lotus Script and any COM oriented programming languages.

Correlate can interface with many information systems. Correlate can natively work with systems that provide links to information in the form of URL or UNC path. Correlate may also be extended to communicate and integrate with additional information systems by creating a Correlate add-in as explained in the Correlate SDK.

Correlate stores the structured information in a standard XML file with a unique file extension (\*.kma). By using an open standard as XML for the document structure, Correlate is on the cutting edge of communication and integration with other systems. The Correlate file could be indexed, understood and manipulated by any standard XML tool and from any standard programming model.

### ***Summary***

Correlate for Sharepoint will take your projects to a new level of accuracy, reliability and speed. The use of Correlate significantly enhances SharePoint Services collaboration capabilities, assuring projects are done faster, better and easier.

For more information on Correlate for Windows SharePoint Services contact [sales@correlate.com](mailto:sales@correlate.com) or contact Correlate headquarters in Norway at + 47 330 66 660