

ProjectSolve^{SP} Self Study Guide

Overview

What is ProjectSolve^{SP}?

ProjectSolve^{SP} (a.k.a., ProjectSolve SharePoint) is WSP's project collaboration software application that provides a central, secured, web-based, access point to project data for all members of a project team regardless of that member's organization affiliation or geographical location.

"ProjectSolve" applications have been available to clients since 1999 and have been successfully utilized on thousands of WSP project sites over the last two decades in order to administer project data and manage projects during this time frame.

Why is ProjectSolve^{SP} important to me?

ProjectSolve^{SP} is available to all WSP clients who wish to use it as a benefit of doing business with WSP, and the product is used to provide a low-cost collaboration and project management solution for these projects. Because WSP does not charge for user licenses or data storage (as long as WSP is contracted to provide services to that project, other than ProjectSolve hosting, in either a primary or sub role), projects are only asked to pay for the time of Project Information Management (PIM) staff assisting them, making ProjectSolve^{SP} a low-cost alternative for similar products on the market.

What is the purpose of this document?

This document was created to provide users of the ProjectSolve^{SP} product with a guided self-study that they can follow to become more familiar with this product and how it can be used to benefit their projects.

Instead of going through all 100+ files on the help site, this document will guide the user, based on their level of interest, through a set of specific documents and videos recommended for their user level and interests.

User Levels

- **Introductory User** – Provides a basic introduction to the product.
- **Daily User** – For daily users of the product who would like to get more out of the ProjectSolve^{SP}.
- **Coordinator** – Provides lessons for the day-to-day management of a ProjectSolve^{SP} project site.
- **Administrator** – For project administrators who want to better manage and control access to their project site.

Note: Each of these user levels builds off of the previous one in order to gain a full understanding of the ProjectSolve^{SP} product and its capabilities.

How can I learn more about ProjectSolve^{SP}?

The ProjectSolve^{SP} Help site (<https://public.pbid.com/sites/help/>) provides well over 100 lessons in PDF and video format to help all level of users to better understand what they can do with ProjectSolve^{SP} for their projects.

User Level: Introductory User

The items in this section are for new users and people looking for an introduction to what ProjectSolve^{SP} is and how it can be used to help manage their projects.

Access Levels

This section applies to the following ProjectSolve^{SP} user access levels:

- ✔ • Visitor
- ✔ • Read Only
- ✔ • Uploader
- ✔ • Contribute No Delete
- ✔ • Contribute
- ✔ • Member (Coordinator)
- ✔ • Edit
- ✔ • Design
- ✔ • Owner

Watch

- Introduction to ProjectSolve^{SP}** – This video provides a 30-minute introduction to the ProjectSolve^{SP} application. (https://public.pbid.com/sites/help/HDIVids/Intro_to_PSSP_2017)

Read

General Information

- ProjectSolve^{SP} Primer** – This is an 8-page overview of ProjectSolve^{SP} and the tools that come with it. (https://public.pbid.com/sites/help/Shared%20Documents/PSSP_Primer_V_1_2.pdf)
- ProjectSolve^{SP} User's Guide** – This is the standard User's Guide for learning how to use ProjectSolve^{SP}. (https://public.pbid.com/sites/help/Shared%20Documents/PSSP_UserGuide.pdf)

ProjectSolve^{SP} Functionality

- How Do I ... Basic File Management in ProjectSolve^{SP}** – Reviews the file management features included out-of-the-box with ProjectSolve^{SP}. (<https://public.pbid.com/sites/help/HDI Docs/HDI-FileMgmt.pdf>)
- How Do I ... Open a File within ProjectSolve^{SP}** – Describes how to open and view a file stored on ProjectSolve^{SP}. (<https://public.pbid.com/sites/help/HDI Docs/HDI-OpenaFile.pdf>)
- How Do I ... Download Files from ProjectSolve^{SP}** – Describes how to download files from ProjectSolve^{SP} to a local machine. (<https://public.pbid.com/sites/help/HDI Docs/HDI-DownloadFiles.pdf>)
- How Do I ... Establish Alerts within ProjectSolve^{SP}** – Describes how to use the “Alert Me” feature to setup automated email notifications from ProjectSolve^{SP}. (<https://public.pbid.com/sites/help/HDI Docs/HDI-AlertMe.pdf>)
- How Do I ... Search ProjectSolve^{SP}** – Describes how to use the ProjectSolve^{SP} search and results refinement features. (<https://public.pbid.com/sites/help/HDI Docs/HDI-Search.pdf>)

User Level: Daily User

The information in this section is for users who frequently work in ProjectSolve^{SP} (either daily or multiple times a week) and who would like to get the most they can out of the product.

Access Level

This section applies to the following ProjectSolve^{SP} user access levels:

- ✗ • Visitor
- ✗ • Read Only
- ✓ • Uploader
- ✓ • Contribute No Delete
- ✓ • Contribute
- ✓ • Member (Coordinator)
- ✓ • Edit
- ✓ • Design
- ✓ • Owner

Watch

- Using ProjectSolve^{SP} with Microsoft Outlook** – This video provides an overview of the most common ways to connect ProjectSolve^{SP} to Microsoft Outlook.
(https://public.pbid.com/sites/help/HDIVids/PSSP_Outlook)

Read

File Management

- How Do I ... Add Files to ProjectSolve^{SP}** – Describes how to add files to a ProjectSolve^{SP} Project Site. (<https://public.pbid.com/sites/help/HDI Docs/HDI-AddFiles.pdf>)
- How Do I ... Use Open with Explorer** – Describes how to access the files within a ProjectSolve^{SP} document library using Windows Explorer.
(<https://public.pbid.com/sites/help/HDI Docs/HDI-OpenWExp.pdf>)
- How Do I ... Delete / Retrieve a File within ProjectSolve^{SP}** – Describes how to delete a file within ProjectSolve^{SP} and then how to restore it if deleted in error (if the user has sufficient rights.)
(<https://public.pbid.com/sites/help/HDI Docs/HDI-DeleteRestoreFile.pdf>)
- How Do I ... File Check Out / Check In within ProjectSolve^{SP}** – Describes how to reserve a file for editing and how to release that reservation when you are finished.
(<https://public.pbid.com/sites/help/HDI Docs/HDI-CheckOutCheckIn.pdf>)
- How Do I ... Co-Author a File on ProjectSolve^{SP}** – Describes how up to ten people can edit / compose certain types of Microsoft Office files on ProjectSolve^{SP} at the same time.
(<https://public.pbid.com/sites/help/HDI Docs/HDI-CoAuthor.pdf>)
- How Do I ... Work with File Properties within ProjectSolve^{SP}** – Describes how to work with metadata and file properties to tag files for better search and usage.
(<https://public.pbid.com/sites/help/HDI Docs/HDI-FileProperties.pdf>)
- How Do I ... Work with File Version History in ProjectSolve^{SP}** – Describes how to initialize, access and work with the version history feature for files stored within a ProjectSolve^{SP} document library. (<https://public.pbid.com/sites/help/HDI Docs/HDI-VersionHistory.pdf>)

- How Do I ... Compare File Versions in ProjectSolve^{SP}** – Describes how to use the Version History feature in ProjectSolve^{SP} to compare an older version of a MS Word document with the latest version of that same document stored on ProjectSolve^{SP}.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-CompareVersions.pdf>)

Data Management

- How Do I ... Work with Data in ProjectSolve^{SP}** – Describes how to manipulate the data being shown on screen in a list or library to find the information that you are looking for.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-DataMgmt.pdf>)
- How Do I ... Work with Data Views within ProjectSolve^{SP}** – Describes how to change the views of data shown when working within a ProjectSolve^{SP} list or library.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-DataViews.pdf>)
- How Do I ... Use Quick Edit to Modify Multiple Items at One Time** – Describes how to use the Quick Edit feature to modify the properties for multiple items within a ProjectSolve^{SP} document library at the same time.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-QuickEdit.pdf>)
- How Do I ... Hide Folders within a Library** – Describes how you can hide the folders within a ProjectSolve^{SP} document library so as to only see the files that are stored there.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-HideFolders.pdf>)
- How Do I ... Export ProjectSolve^{SP} Data to Microsoft Excel** – Describes how to export a ProjectSolve^{SP} list to a Microsoft Excel sheet. (<https://public.pbid.com/sites/help/HDIDocs/HDI-ExportToExcel.pdf>)

Miscellaneous ProjectSolve^{SP} Features

- How Do I ... Communicate with ProjectSolve^{SP}** – Describes how users can utilize email to interact with a ProjectSolve^{SP} project site. (<https://public.pbid.com/sites/help/HDIDocs/HDI-Communicate.pdf>)
- How Do I ... Connect ProjectSolve^{SP} to Microsoft Outlook** – Describes how to connect ProjectSolve^{SP} to Outlook in order to view PSSP calendars, files and contact lists locally.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-ConnectToOutlook.pdf>)
- How Do I ... Markup PDF Files within ProjectSolve^{SP}** – Provides an overview for how to use the “Brava!” file viewer software that is included with ProjectSolve^{SP} to add markup comments to PDF and other file types within a Document Library.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-BravaMarkup.pdf>)
- How Do I ... Access Brava!’s Advanced Features** – Provides an overview of the advanced features included in the “Brava!” file viewer software, including the Markup Comparison tool, the text Redaction tool and the Publishing tools for creating PDFs and TIFFs from viewed files.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-BravaAdvanced.pdf>)
- How Do I ... Save My Password for ProjectSolve^{SP}** – Describes how to properly save your password credentials on ProjectSolve^{SP} so you are not asked to provide them with each login or file access. (https://public.pbid.com/sites/help/HDIDocs/HDI-SavePW_v2.pdf)

User Level: Site Coordinator

This section is for users who are responsible for managing the day to day operations of their project site.

Note: This section requires a greater level of access rights and may require the user to participate in additional training with the ProjectSolve^{SP} Support Desk.

Access Level

This section applies to the following ProjectSolve^{SP} user access levels:

- ✗ • Visitor
- ✗ • Read Only
- ✗ • Uploader
- ✗ • Contribute No Delete
- ✗ • Contribute
- ✔ • Member (Coordinator)
- ✔ • Edit
- ✔ • Design
- ✔ • Owner

Watch

- Using ProjectSolve^{SP} for Document Management** – This video provides an overview of the Document Management features included with ProjectSolve^{SP}.
(<https://public.pbid.com/sites/help/HDIVids/PSSP4DMS>)
- Using Nintex Workflow with ProjectSolve^{SP}** – This video provides a basic demonstration of how a ProjectSolve^{SP} Document Library can be enhanced through the addition of an electronic Nintex Workflow. (https://public.pbid.com/sites/help/HDIVids/PSSP_Nintex)
- Using ProjectSolve^{SP} for Project Management** – This video provides an overview of Project Management tools that are available to WSP projects using ProjectSolve^{SP}.
(<https://public.pbid.com/sites/help/HDIVids/PSSPforPM-01b>)

Read

Site Maintenance

- How Do I ... Manage the Quick Launch / Global Navigation Links** – Describes how to modify the Quick Launch Menu and Global Navigation tabs for a project site.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-QuickLaunchGlobNav.pdf>)
- How Do I ... Add a Site Map to a ProjectSolve^{SP} Site** – Describes how to add a table of contents to your ProjectSolve^{SP} project site. (<https://public.pbid.com/sites/help/HDIDocs/HDI-AddSiteMap.pdf>)
- How Do I ... Create an Automated Site Menu in ProjectSolve^{SP}** – Describes how to create an automated site menu on the parent site of a site collection that automatically updates as new sub-sites are added to that collection. (<https://public.pbid.com/sites/help/HDIDocs/HDI-CreateCSWPMenu.pdf>)
- How Do I ... Change the Theme for a ProjectSolve^{SP} Site** – Describes how to use the built-in theme tools to easily change the look and feel of a ProjectSolve^{SP} Project Site.
(<https://public.pbid.com/sites/help/HDIDocs/HDI-ChangePageTheme.pdf>)

- How Do I ... Add a Clock to a ProjectSolve^{SP} Page** – Describes how to add a clock widget to a ProjectSolve^{SP} project site. (<https://public.pbid.com/sites/help/HDI Docs/HDI-ClockApp.pdf>)
- How Do I ... Add the Local Weather to a ProjectSolve^{SP} Page** – Describes how to add a local temperature widget to a ProjectSolve^{SP} project site. (<https://public.pbid.com/sites/help/HDI Docs/HDI-WeatherApp.pdf>)

Tool Usage – Lists

- How Do I ... Create Lists within ProjectSolve^{SP}** – Describes how to create lists within ProjectSolve^{SP}. (<https://public.pbid.com/sites/help/HDI Docs/HDI-Lists.pdf>)
- How Do I ... Create a ProjectSolve^{SP} List from an Excel Table** – Describes how to create a ProjectSolve^{SP} list from a Microsoft Excel file. (<https://public.pbid.com/sites/help/HDI Docs/HDI-ExcelToList.pdf>)
- How Do I ... Add a Comment Thread to a ProjectSolve^{SP} List** – Describes how to add a comment field to a ProjectSolve^{SP} list that maintains a running thread of the comments added. (<https://public.pbid.com/sites/help/HDI Docs/HDI-CommentThread.pdf>)

Tool Usage – Libraries

- How Do I ... Create Document Libraries in ProjectSolve^{SP}** – Describes how to deploy a new Document Library within ProjectSolve^{SP}. (<https://public.pbid.com/sites/help/HDI Docs/HDI-DocLibrary.pdf>)
- How Do I ... Create Document Sets in ProjectSolve^{SP}** – Describes how to activate and utilize the Document Set container feature on ProjectSolve^{SP} Document Libraries. (<https://public.pbid.com/sites/help/HDI Docs/HDI-DocSets.pdf>)
- How Do I ... Configure a Document Library to Use Templates** – Describes how to configure a ProjectSolve^{SP} Document Library to utilize pre-made document templates. (<https://public.pbid.com/sites/help/HDI Docs/HDI-ConfigLibTemps.pdf>)
- How Do I ... Add a Drop Off Library** – Describes how to activate the ProjectSolve^{SP} Drop Off Library feature and configure the business rules required to automatically move files to their proper locations. (<https://public.pbid.com/sites/help/HDI Docs/HDI-DropOffLibrary.pdf>)

Tool Usage – Calendars

- How Do I ... Create Calendars in ProjectSolve^{SP}** – Describes how to create and deploy a calendar on a ProjectSolve^{SP} site. (<https://public.pbid.com/sites/help/HDI Docs/HDI-Calendar.pdf>)
- How Do I ... Create a Calendar Rollup in ProjectSolve^{SP}** – Describes how to use calendars that have been deployed to sub-sites to roll up data to a master calendar on the parent site to show the events added on the sub-sites from one central location. (<https://public.pbid.com/sites/help/HDI Docs/HDI-CalendarRollup.pdf>)
- How Do I ... Colorize Calendar Events in ProjectSolve^{SP}** – Describes how to color code ProjectSolve^{SP} calendar events for visual separation of event types or data sources. (<https://public.pbid.com/sites/help/HDI Docs/HDI-ColorCalEvents-v1.pdf>)

Tool Usage – Contact List

- How Do I ... Create a Project Contact List with Team Pictures** – Describes how to create a Contacts list and add a picture field to display team member pictures. (<https://public.pbid.com/sites/help/HDI Docs/HDI-ContactsWPics.pdf>)

Tool Usage – Nintex Workflow

- How Do I ... Add a Nintex Workflow to a ProjectSolve^{SP} Library** – Describes how to add a Nintex Workflow to a ProjectSolve^{SP} Library. (<https://public.pbid.com/sites/help/HDIDocs/HDI-AddWFtoLibrary.pdf>)
- How Do I ... Using Nintex Workflow to Send Invitations to Calendar Events** – Describes how to use Nintex Workflow to send event notifications to users identified within a ProjectSolve^{SP} calendar event. (<https://public.pbid.com/sites/help/HDIDocs/HDI-CalWFInvite.pdf>)
- How Do I ... Create a Document Approval Workflow** – This document provides a quick lesson on one method for setting up a document review library with limited access that then moves files to a publicly accessible area once those items are approved. (<https://public.pbid.com/sites/help/HDIDocs/HDI-DocApprNintex.pdf>)

Tool Usage – Nintex Forms

- How Do I ... Create a Nintex Form** – Describes how to use Nintex Forms to modify the “Create Item” screen with a ProjectSolve^{SP} List or Library. (<https://public.pbid.com/sites/help/HDIDocs/HDI-NF-Create.pdf>)
- How Do I ... Create a Mobile Device Form** – Describes how to use Nintex Forms to create a form designed to work on a mobile device or smart phone. (<https://public.pbid.com/sites/help/HDIDocs/HDI-NF-Mobile.pdf>)

Tool Usage – Survey Tool

- How Do I ... Use the ProjectSolve^{SP} Survey Tool** – Describes how to add an electronic survey to a ProjectSolve^{SP} project site. (<https://public.pbid.com/sites/help/HDIDocs/HDI-Survey.pdf>)

Tool Usage – Task Tool

- How Do I ... Create a Task List in ProjectSolve^{SP}** – Describes how to use the Task template that comes with SharePoint to create a ProjectSolve^{SP} Task List tool; including a time line of planned task events and multiple data views including a Calendar and a traditional Gantt chart. (<https://public.pbid.com/sites/help/HDIDocs/HDI-CreateTaskList.pdf>)

Tool Usage – Wiki

- How Do I ... Create a Wiki in ProjectSolve^{SP}** – Describes how to create a Wiki environment within a ProjectSolve^{SP} project site. (<https://public.pbid.com/sites/help/HDIDocs/HDI-Wiki.pdf>)

Tool Usage – Miscellaneous

- How Do I ... Capture Comments within ProjectSolve^{SP}** – Identifies various ways that comments can be captured within a ProjectSolve^{SP} project site. (<https://public.pbid.com/sites/help/HDIDocs/HDI-CaptureComments.pdf>)
- How Do I ... Add Cascading Lookup Fields in ProjectSolve^{SP}** – Describes how to add a cascading lookup field that connects fields together in a logical format (e.g., Country – State - City.) (<https://public.pbid.com/sites/help/HDIDocs/HDI-CascadedLookup.pdf>)
- How Do I ... Add a Collabion Chart to ProjectSolve^{SP}** – Describes how to create a feature rich chart from a ProjectSolve^{SP} list and then display the results on a page. (<https://public.pbid.com/sites/help/HDIDocs/HDI-AddCharttoList.pdf>)
- How Do I ... Create a “My Ball in Court” (BIC) Page** – Describes how to create a central page that displays the views from one or more objects showing the data assigned to the person who is currently viewing the page. (<https://public.pbid.com/sites/help/HDIDocs/HDI-MyBIC.pdf>)

User Level: Site Administrator/Owner

This section is for users who are responsible for the overall management of the project and project site.

Note: This section requires the greatest level of access rights, and requires that the user participate in additional training with the ProjectSolve^{SP} Support Desk before being granted “Owner” level access rights.

Access Level

This section applies to the following ProjectSolve^{SP} user access levels:

- Visitor
- Read Only
- Uploader
- Contribute No Delete
- Contribute
- Member (Coordinator)
- Edit
- Design
- Owner

Watch

- There are no videos for this section.

Read

- How Do I ... Limit Access to ProjectSolve^{SP} Items** – Describes how to secure access to different areas of a ProjectSolve^{SP} environment, including the project site, tools and objects, folders and individual items. (<https://public.pbid.com/sites/help/HDI Docs/HDI-SecureAccess.pdf>)
- How Do I ... Disable Page Edit Rights for Contributors** – Describes how to disable the “edit” feature for site pages for anyone below “Member” access level. (<https://public.pbid.com/sites/help/HDI Docs/HDI-DisablePageEdit.pdf>)
- How Do I ... Use Column Permissions to Limit Column Access** – Describes how to use the SharePoint Boost “Column/View Permissions” feature to limit access to columns in a list or library. (<https://public.pbid.com/sites/help/HDI Docs/HDI-SPBCColPermissions.pdf>)
- How Do I ... Use Column Permissions to Limit View Access** – Describes how to use the SharePoint Boost “Column/View Permissions” feature to limit access to a view within a list or library. (<https://public.pbid.com/sites/help/HDI Docs/HDI-SPBCVPermissions.pdf>)

To Learn More

- **ProjectSolve^{SP} Help Site** – This is the publicly-accessible, ProjectSolve^{SP} Help Site, containing marketing materials, training materials and other information to assist users in the day to day operation of ProjectSolve^{SP}. (<https://public.pbid.com/sites/help/>)
- **ProjectSolve^{SP} Demo Videos** – These are a series of videos for learning more about ProjectSolve^{SP}. (<https://public.pbid.com/sites/help/SitePages/Demos.aspx>)
- **ProjectSolve^{SP} “How Do I” Files** – These are dozens of “How Do I” guides for all levels of ProjectSolve^{SP} users. (https://public.pbid.com/sites/help/Shared%20Documents/PSSP_HDI_Files.pdf)