

Business Solutions: Outreach Project Tool



The Outreach Project Tool was developed by CSO Lanifex GmbH to support communication with customers during project implementation. It has rapidly evolved into a highly effective Web-based collaboration system, which improves interaction between consultants and their clients, as well as a wide range of other applications.

Benefits

OPT is the single point of contact for all customer interaction for a project. Each customer is registered with a login and password, and granted access only to the projects they're involved with. They can then see the project status at a glance, including a repository of documents, lists of tasks and their start and end times, an archive of all project-related e-mail and a list of requests.

Features

Web Interface

All access to the OPT is via a Web interface, which means it can be used from any Internet-enabled computer, including Windows, Macintosh or UNIX. The data is stored in a SQL database, making it easy to share with other applications if required.

Document Archive

The document archive provides a place to upload documents onto the Web server, which can then be downloaded easily by other people assigned to the project. Documents can be stored in their native format (such as Word, Word Perfect, Star

Office, etc.) or converted to PDF or HTML for easier access. Every time a new document is uploaded, each other member of the project team (including the customer) is automatically notified via e-mail, making business communication much easier, even across different time zones.

E-mail Archives

The e-mail archive automatically stores all messages, which are CC'ed to the project repository, so they can then be retrieved by date or subject. This makes tracking some of the informal communication much easier.

Project Tasks

The tasks module provides a list of all tasks, along with the owner, start and end dates, and current status. Every task can also have comments added at any time, so the customer can make comments or request feedback. (Task status is normally updated by the project owner.)

Requests

The requests module is essentially a simple trouble ticket system, which allows customers to create new requests, (such as changes to project tasks or service needs), and assign them to a specific person. That person is then informed via e-mail, and will receive regular reminders as long as the request is open. Every time they log in, they will see a list of all open requests.

News and Knowledge

The OPT system can also be used for announcements, which appear for all

users (or specific project groups) every time they login. There's also a knowledge base for information with an integrated search facility.

Newsletter

With larger projects, there is a newsletter feature, which when activated will automatically send a collection of articles (news items) to all the members of a team on a regular basis, or when a pre-selected number of articles have been submitted.

Document Links

Although not intended as a document management system, the OPT is a very friendly way of storing documents on a Web site so they can easily be retrieved. This works well with CSO Lanifex's other product, the DMO, which allows you to link to Web documents for the purpose of documenting computer infrastructure.

Security

Only authorized users are granted access to information, and authorization is performed with a user login and password, optionally over an SSL connection, and with full session management.

Administration

The administrator will be able to easily add new companies, and for each company add any number of persons who can see that company's projects. For each person, there is basic contact information including name, e-mail address and telephone numbers.

Implementation: Contact Information

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