Visualise and manage projects and knowledge - with MindManager Enterprise and Microsoft SharePoint

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Microsoft® SharePoint® is used in almost 80% of the Fortune 500 companies; around 100 million users across the globe use this solution for team collaboration and document management behind the company's own firewalls or even as a cloud platform in the form of SharePoint 365. The latter offers small and medium-sized companies a cost-effective collaboration platform. The significant advantages of a hosted solution, however, are also increasingly attracting large companies. Many companies that use Microsoft Office use the SharePoint server as a central contact point for all documents. Ultimately, this allows for different versions of documents to be managed, shared with colleagues and used for various purposes.

Ever since the release of SharePoint server version 2010 and 2013, the solution has not just been used as a collaboration platform, its often converted to a central tool for a company's own intranet. Broader application as a knowledge management, content management and task and project management solution is increasing; however, companies are also increasingly complaining of a lack of SharePoint acceptance. Studies prove that many users experience difficulty working with SharePoint and the usage rate of the platform is decreasing.

According to a study by Forrester® Research, as much as 37% of IT decision-makers said that SharePoint should be thoroughly optimised. As a result, more and more applications are making SharePoint easier to work with and more intuitive.

The current Mindjet® MindManager Enterprise® version is now integrated and optimised for the SharePoint environment, and supported so that handling with SharePoint is sustainable. **The user can now work with MindManager maps in exactly the same way as with other Office documents in SharePoint,** which significantly improves integration into existing work processes: Thanks to the capturing and organisation of (project) information in a single view, the user benefits from easier organisation of work. **The visual MindManager dashboard also places SharePoint content into context and facilitates navigation between the numerous SharePoint lists and documents**.

In this white paper, we would like to emphasise two key areas of application in which the user can benefit from the integration of both systems: information, navigation and knowledge maps, and secondly project management maps.

Before that, we will provide a brief overview of MindManager® and which key integration concepts become important when using it as a business solution.

1. What is MindManager?

MindManager is a productivity software application that, as a central work tool, supplements the mind mapping method with numerous functions for the management of tasks, projects, information and knowledge. It assists individual users, but most importantly teams and businesses, in the organisation of their personal workloads and in their cooperation.

1.1. MindManager is based on the mind mapping method

Mind mapping is a technique which is easy to understand, allowing information and knowledge to be captured and visualised intuitively. Fundamentally, the manner in which it is visualised must naturally reflect how we think and comprehend things. Correlations on the basis of a tree-type structure are central to this visualisation technique, with certain topics branching out into further details. They are enhanced by further visual elements, such as images, symbols, colours and cross-links (relations).

1.2. MindManager is more than just pure mind mapping

The basic functions of MindManager have been extended considerably over the years and go well beyond conventional mind mapping, albeit without compromising the intuitive handling and flexibility of the method. Comprehensive functions and, more specifically, the integration and export possibilities from and to other systems and file formats make MindManager a pivotal working tool in everyday business practice.

The extended mind mapping method in MindManager (which is also known as business information mapping to distinguish it from conventional mind mapping) is based on three core concepts:

1. Intuitive visualisation

2. Simple and flexible capture and structuring

3. Integration with other systems for rapid aggregation of distributed information from other systems and/or documents

All three concepts are essential and support one another. The strength of MindManager lies not only in visualisation, but also especially when working flexibly and visually with information.

Intuitive visualisation

Visualisation is used to provide a better overview, to identify correlations more quickly and to focus more easily on what is important. Visualisation encourages a better and lasting understanding. It nurtures more transparent communication and facilitates comprehension of the 'bigger picture' within teams, without necessarily requiring a detailed explanation. This applies both to the creation of mind maps and to understanding them. The generation of visually attractive maps and its impact on user acceptance should not be under-estimated. This method is usually perceived to provide more momentum, motivation, and leads to a significantly higher level of acceptance amongst employees than more conventional methods. The latest versions of MindManager also support additional types of visualisation and diagrams, such as flowcharts, concept maps, timeline maps, etc.

Simplicity and flexibility in capture

MindManager enables information to be captured and structured very quickly. The theme of simplicity and intuitive handling is also of central importance here in order to support day-to-day knowledge work with the utmost efficiency. Unlike post-its, whiteboards and other tools for collecting and structuring information, MindManager does not require any time-consuming logging, rewriting or sticking. **You can run through various scenarios in a single map view, and new entries can be added later on**.

Rapid capture and structuring ensures that more content is combined in a shorter period of time and can be contextualised. Additional scenarios can therefore be played out, details can be added to and knowledge can be extrapolated, which significantly advances information work.

Integration of external information

Work within the scope of business processes and of daily tasks requires access to information that is generally available at different locations and in different formats: on websites, spreadsheets, e-mails or more complex systems. This means that while the necessary information is available in most cases, it is spread across many different information sources; significantly, there is no general overview. Furthermore, the current flood of information makes it difficult to see the 'wood for the trees'. However, **understanding relations and connections between all information** is an important prerequisite for performing tasks with competence. MindManager supports numerous interfaces (to MS Office, MS Project and MS SharePoint, amongst others), permitting quick aggregation of distributed information. For this purpose, this information is not simply linked; the content is depicted directly in the context of each map. As a result, you can link information from a variety of sources and identify connections more quickly. The synchronisation with the linked systems supports the avoidance of redundancies and ensures that the information in the map is always up to date. MindManager supports:

- Quick aggregation, including of information from external sources
- Updating of information and data
- Avoidance of manual transferring of information and of redundancies
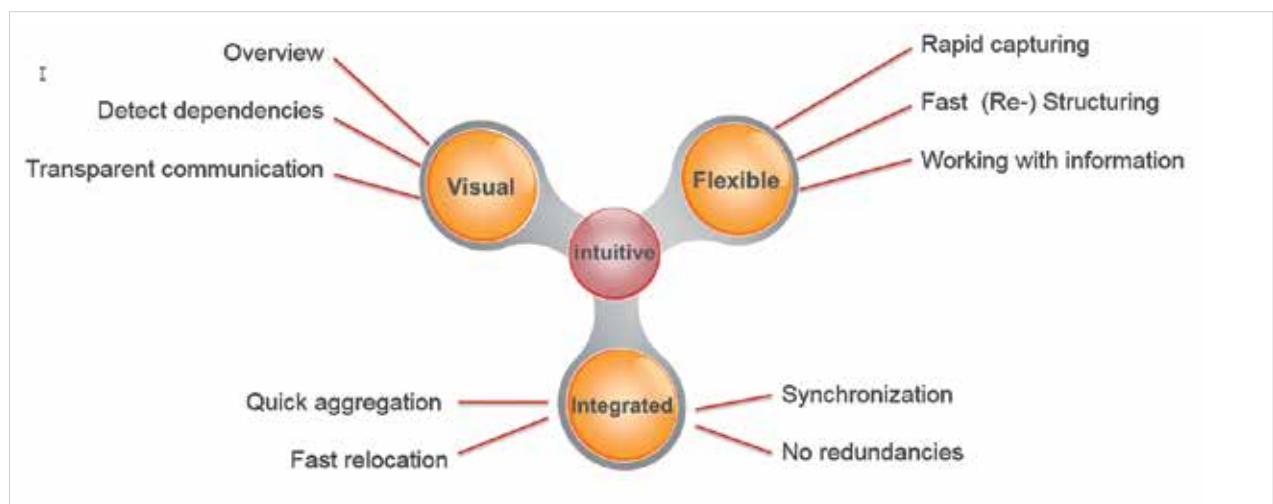
2. Integration concepts of MindManager and Microsoft SharePoint

2.1. SharePoint as a storage location for (team) maps

SharePoint is frequently used as a replacement for fileshares and as a document management system, to lock documents for editing for example (check-in and out), to automatically create main and additional versions of documents and to manage access rights. An interface is specifically integrated into the MindManager file menu for this, similarly to Microsoft Office applications, which enables SharePoint document libraries that are frequently required to be integrated as defined storage locations and supports the revision control and check-in/out rules defined in SharePoint.

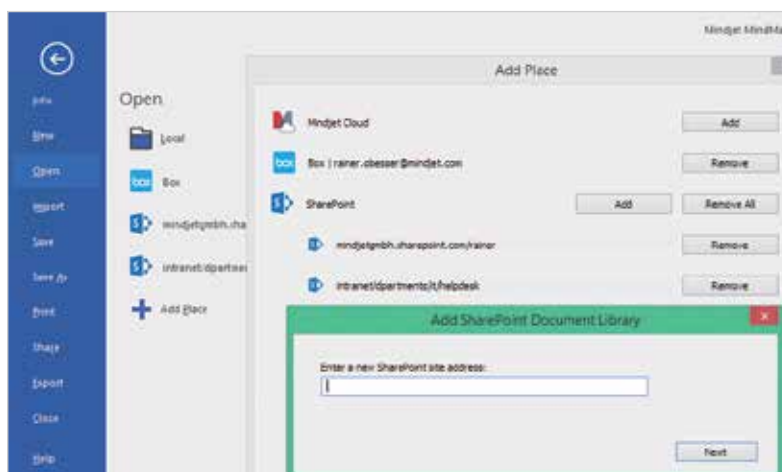A map can therefore be easily saved in SharePoint and opened from there for editing.

Figure 2: Integrating SharePoint storage locations

The locking and releasing of maps that have already been edited can be controlled directly from the map view, without diverting via the file menu.

Figure 3: Checking in/out directly in the map

2.2. Synchronising map tasks with SharePoint tasks

MindManager enables tasks to be defined with all commonly-used task attributes, such as priority, status, start and end date, duration, and resources.

The so-called SharePoint linker interface now enables these map tasks to be transferred to SharePoint task lists and map tasks to be synchronised with SharePoint tasks. ToDo lists created using the map can then be assigned and distributed to all project members via SharePoint.

Users are also able to import a team site into the resource list in MindManager using their own menu point.

Upon synchronisation with SharePoint, the tasks in MindManager are added to all additional information defined in SharePoint (list columns) as topic properties. Moreover, a hyperlink to the task in SharePoint is added so that you are able to navigate quickly from the map to the task in SharePoint. Thanks to **the bidirectional synchronisation**, tasks can now be edited and synced both in MindManager and SharePoint.

People are also able to access tasks generated in maps due to the SharePoint integration even if they have no access to MindManager.
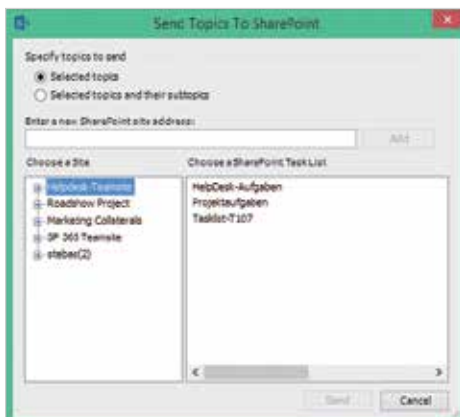

Figure 4: Sending map tasks to SharePoint

2.3. Visual task dashboards with task requests

As team members usually work simultaneously on various projects and tasks and therefore with several SharePoint team sites, team leads require individual overviews of all tasks, their status and the total workload of the team members in relation to all projects. A visual dashboard with several configurable, cross-site requests provides the opportunity to create such an overview. SharePoint linker requests using several SharePoint task lists enable simple creation of an arbitrary number of these visual map dashboards, each of which can be configured according to very different, individual requirements.
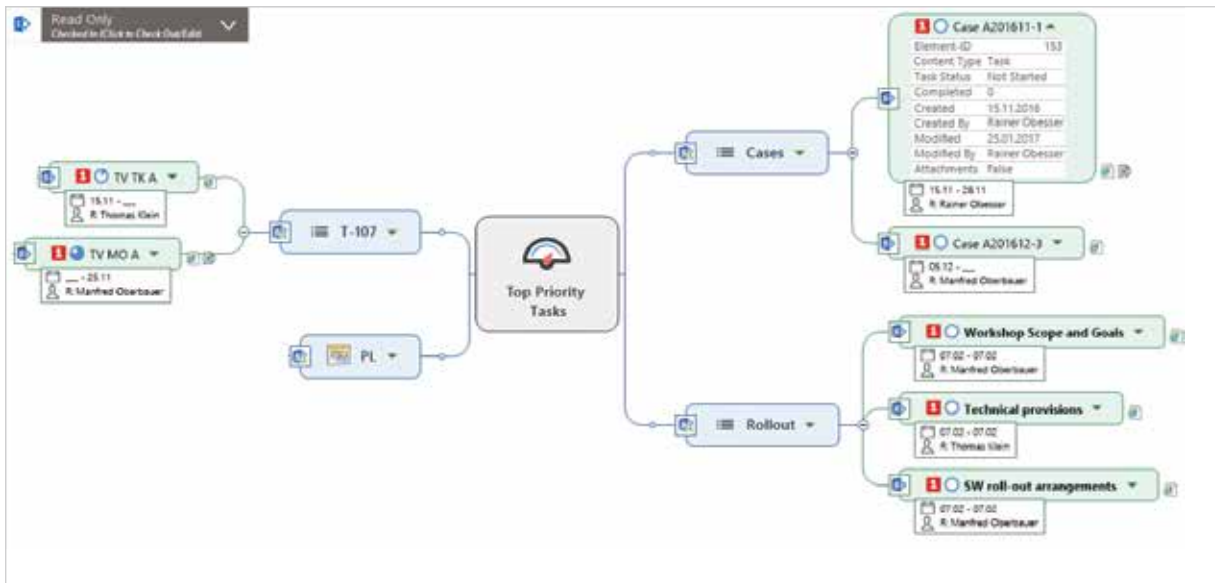
Figure 5: Map as task dashboard

Every member can set up their own personal visual dashboards, in which they simply use requests tailored to their requirements in their own maps.

Various types of conditions can be specified with requests. For example, you can define a request that searches for tasks that come from a specific project or from a SharePoint task list and that therefore fulfil additional redefined criteria. Value criteria for resources and for the start and end date or status values (progress values) amongst others can be defined here.
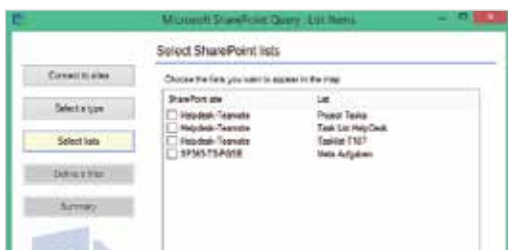

Figure 6: Task request - selecting lists

Here are a few examples:

- If you wish to arrange a team meeting to discuss the project-wide tasks for the current week, simply define the corresponding request for each project. Determine the due dates corresponding to the week; generic information such as "this week" can also be used.

- The same map can be used for a four-eye principle with a specific team member and filtered in the map according to the corresponding resource. A specific request can also be set up for each team member in the map.

- A team member can create a project-wide overview of all their own tasks in all projects. Other requests can also be added: one for all tasks for the current day and one for all tasks for the whole week.

The dashboards only need to be set up once for this as they are either updated automatically or on request and the most recent data relating to the conditions that have been defined in the requests are always displayed.

2.4. Requests using SharePoint lists and libraries

With the SharePoint linker, not only can you request task lists but you can also integrate list elements from all other SharePoint standard lists (document libraries, problem tracking lists, image libraries, hyperlink lists, announcement lists) and even custom lists into a map.

This enables data from various sites and lists to be combined relatively quickly and easily and brought into a useful context. This way, for example, you can add open tasks to problems or link related documents to a problem in one view.
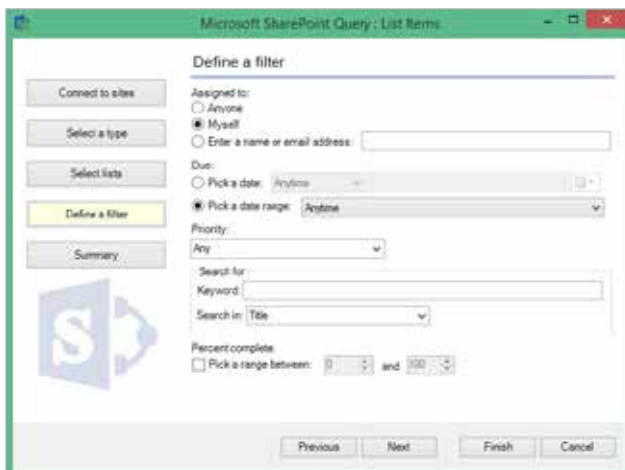

Figure 7: Task requests - setting filters

The SharePoint linker functions described do not require any additional settings or configurations at all in SharePoint and work together with all SharePoint versions from SharePoint 2010 onwards, as well as with SharePoint 365.

2.5. MindManager Server app – the HTML5 map reader as a SharePoint add-on (optional)

If you wish to provide important information via the MindManager map in SharePoint, you require a solution that ensures every SharePoint user can call up this information, even if there is no installed MindManager desktop version available. Especially in the case of dynamic, frequently changing content, the conventional method of exporting to a standard Office format, PDF or HTML file is often too inconvenient. The MindManager Server app for SharePoint (2013/2016) enables MindManager maps saved in SharePoint to be displayed directly in the browser, without diverting. As the SharePoint app or add-on is available through the (internal) SharePoint app store, this new

HTML5 map reader can be added to any team site as required and extends the SharePoint document menu with the corresponding entries to display maps (.mmap files) in the browser or to edit using MindManager for Windows.

The app requires the availability of an app store infrastructure and can therefore be used from SharePoint 2013 onwards, both on-premise and also online (Office /SP365).

The SharePoint linker functions of MindManager for Windows described above work completely independently of the additional (and optional) MindManager Server app provided in SharePoint.
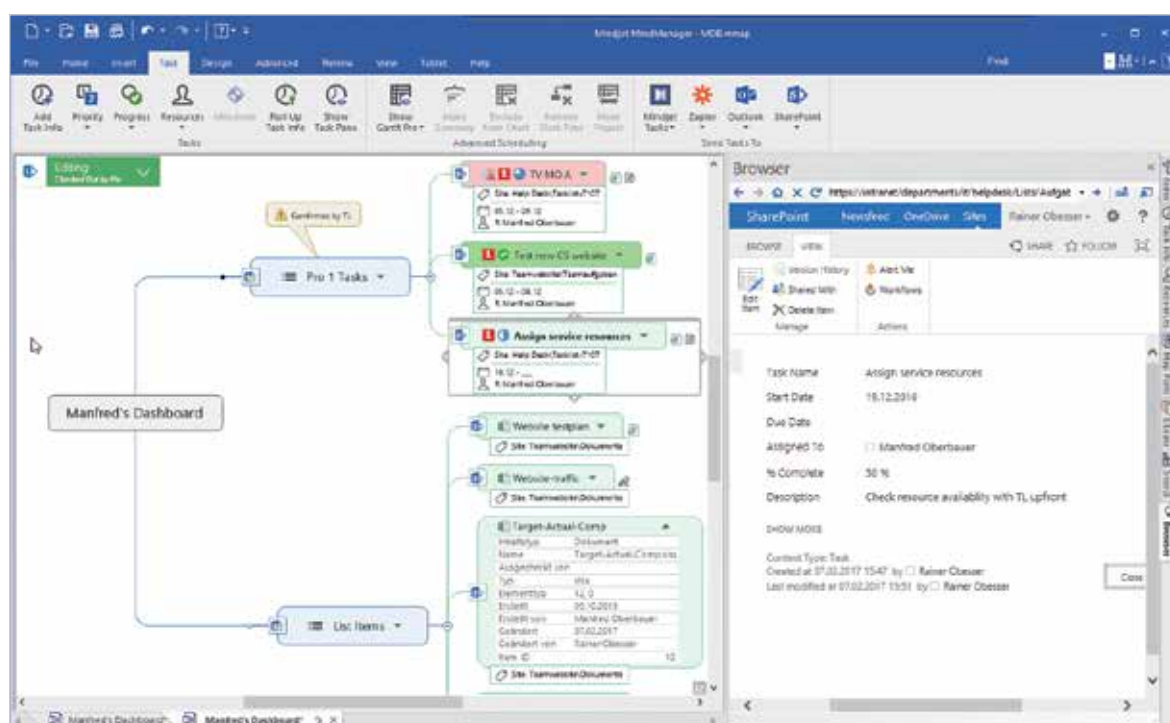

Figure 8: Task and document requests in one map

3. Information and knowledge maps and navigation maps

Microsoft SharePoint has become more and more established in recent years as a portal for collaborative knowledge management in businesses, thereby providing powerful tools and concepts for the central storage, revision control, categorisation and the rapid retrieval of information and knowledge, to name but a few aspects. Solution partners, such as Mindjet, are using the opportunity to integrate additional tools for requirements not addressed in SharePoint. One aspect that is becoming increasingly important is the opportunity to be able to aggregate or reuse information or knowledge packages in various areas of knowledge. As a rule, a lot of information belonging to an area of knowledge is distributed today via many SharePoint sites and libraries. The aim of the aggregation is to be able to see related **information in both the overview and in context** as this is crucial

for understanding and knowledge development. It is obviously important here that information is not copied and redundancies generated as a result.

Areas of knowledge that are subject to frequent changes such as in projects and our everyday tasks create a particular challenge. It is necessary here to create knowledge structures that include all relevant information relating to planning and implementation, even if or just because this often involves very short-term and temporary knowledge structures that are generally no longer used once a task is carried out or a project completed (even if documentation and experience reports could be very valuable). SharePoint does offer the opportunity, for example via Web Parts, to compile content from different sites or libraries into one overview; however, this usually involves including an administrator or site owner, who quickly reaches their time limit with the high number and frequency of such user requests. In addition, Web Parts do not necessarily provide the flexibility and possibilities to be able to adequately combine and portray any correlations between individual SharePoint information elements.

The challenge becomes putting users in a position to be able to quickly contextualise **information in terms of knowledge or project themselves**. Particularly for the implementation of many tasks, in which more and more information flows in from different sources, a corresponding fast and user-specific aggregation of information becomes increasingly important. Users must be able to combine information from various SharePoint sites or other storage locations as easily and flexibly as possible. It is also necessary to be able to present knowledge in such a way that it remains manageable, transparent and easy to understand.

Knowledge visualisation using maps includes visual and intuitive capture and dynamic structuring and preparation of knowledge in so-called knowledge maps or business information maps. However, it is now important in some circumstances, to link the information from SharePoint not only within a map, but also to be able to view the content directly in the map. A change to the sites and libraries that contain the original information is therefore avoided and it becomes possible to see, compare and analyse content from separate information sources directly in context.

In order to implement this, information from SharePoint lists and libraries can be integrated easily into a map using requests in MindManager so that there is no manual outlay for the capture. Synchronisation ensures that the integrated information always remains up to date.

Using the mapping method, the multitude of existing inhibition thresholds for the documentation of knowledge is also reduced, as knowledge can be captured quickly and initially in an unstructured manner in key words (branches) and then connected using drag and drop. A transparent and comprehensible knowledge structure is therefore produced relatively quickly, without having to create pages of running text.

A common argument for SharePoint users (especially newcomers) is that the way they navigate through sites, lists, and different views takes time to get used to and is often confusing and too complex. As a result, many new users in particular do not accept SharePoint, and much content is overlooked or not found. **In visual maps, important content can be summarised by topic** and, in the truest sense of the word, used as a map for targeted navigation to topic-relevant or frequently required content in SharePoint: an obvious time-saver and valuable aid, not least for inexperienced or occasional SharePoint users who are not yet familiar with the navigation concepts of SharePoint.

MindManager Enterprise also enables SharePoint users to view maps directly in the browser using the HTML5-based reader app, without a MindManager licence. The interactive capabilities of the reader allow the users, to show and hide levels of detail in the map, to search for content in the map, and especially to follow the hyperlinks

within the map, by way of example. This enables users (even without a MindManager licence) to take advantage of knowledge and even navigation maps directly from SharePoint.
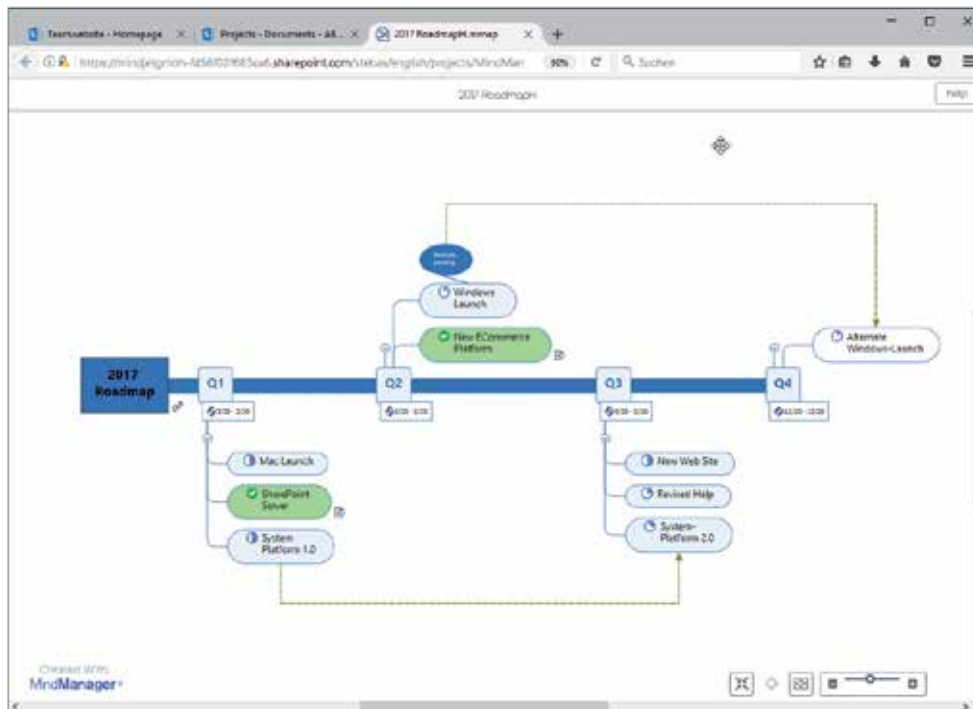

Figure 9: Documentation map in the reader app

4. Planning and implementing projects

The majority of project management systems and tools are designed to track tasks, services and schedules. Initial creative and planning phases are, however, difficult to implement in these tools. SharePoint also does not include any functionality to assist in the joint, initial agreement and drawing up of a plan.

One of the most common reasons for projects failing, however, is poor definition of the objectives and requirements and inadequate tracking of individual tasks. The ever-increasing flood of information combined with less time is certainly an additional factor that heavily influences the success of a project. More and more information is accumulating, making the use of tried-and-tested practices for optimising the planning, costs and quality of a project more difficult. In addition, well-known, lofty challenges and problems of communication and aligned coordination in the project team ultimately result. Coordinating all project members in a way that targets and deadlines are met is crucial. The fact that **all members always have the same level of information** and have the so-called "big picture" in mind, makes the difference here between a successful project and one that is out of control.

Once goals, budget, and priorities have been clearly defined for a project, the next step is usually to draft a detailed schedule that includes all tasks to be completed at specific times and by specific people. MindManager can assist in the setting up of tasks, resources, and schedules by performing a plausibility check beforehand of all the

prerequisites and relationships involving the whole team. It is therefore able to determine resources, demonstrate dependencies, identify risks and create schedules, by way of example. MindManager is able to display schedules for individual tasks according to project areas and can even insert Gantt chart views.

Thanks to the visualisation of the responsibilities and deadlines in each map, each team member is able to easily identify and filter out their own tasks in the context of the overall project easily.

To also make these tasks available in SharePoint task lists, MindManager, as previously mentioned, allows you to synchronise certain tasks of a map with a SharePoint task list. Task branches in the map are given a hyperlink to the appropriate task in SharePoint so that you are able to navigate very quickly from the map to the task in SharePoint. Tasks can now be edited and synced both in MindManager and SharePoint. Synchronisation ensures that the tasks are up to date in both systems and views. This means that the members of a project team can always work with the appropriate tool and the **added value of both solutions (MindManager or SharePoint)** can be used simultaneously.

Another advantage is that project maps can also be made available through the reader app to members who do not have a MindManager licence.
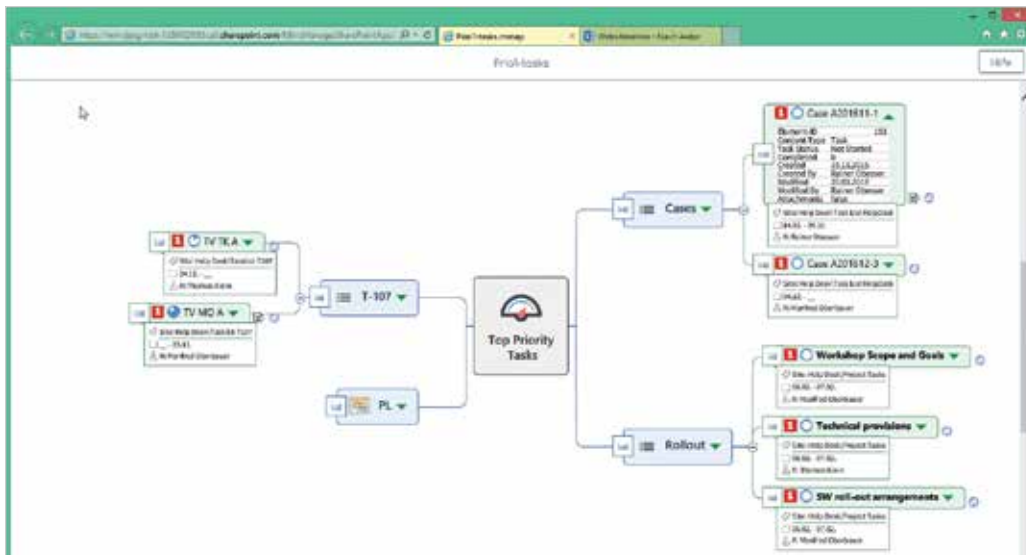

Figure 10: Task dashboard in the reader app

5. Conclusion

MindManager ensures a clearer overview depiction of Microsoft SharePoint content in the form of mind maps. The intuitive visualisation simplifies capturing and structuring of knowledge and information and supports teams in planning projects, generating tasks and editing information. The improved overview due to visual depiction and the improved capability of allocating information in a targeted manner do not just ensure a higher level of acceptance of SharePoint. In addition, SharePoint integration into Mindjet makes it much easier to find information in SharePoint. The result: support requests decrease and the use of SharePoint increases again. Knowledge is therefore available more rapidly and communicated in an easier manner.

This method of working provides many advantages. The primary objective is to be able to individually create and display information, including its dependencies, in an overview, and not forget about any information that is relevant to the implementation of projects or tasks. Information is found directly from the context and the otherwise time-consuming search time for its retrieval is reduced.

The integration of MindManager and SharePoint enables businesses to improve the management of projects and knowledge in a sustainable manner.