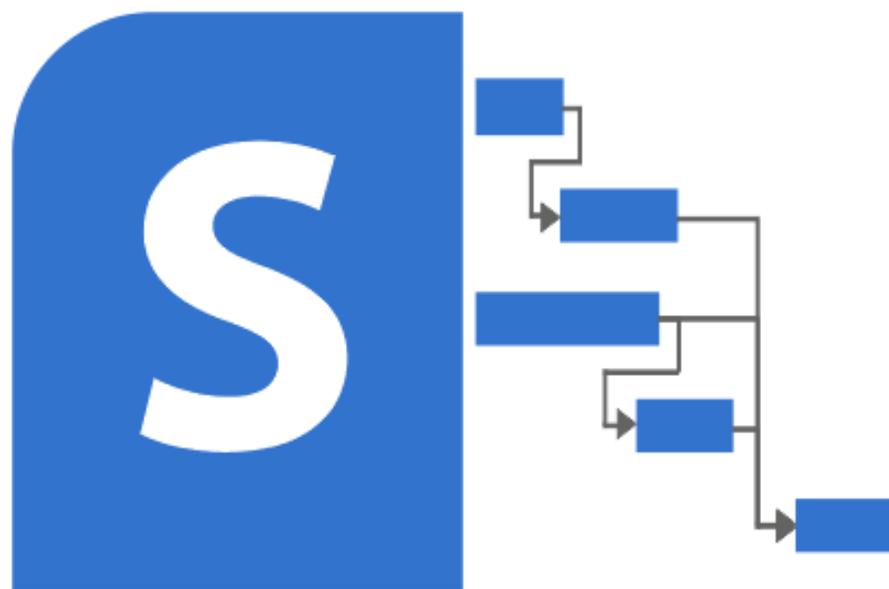# Project Management

with

SharePoint

How to Make Your Project Management More Efficient

ROLAND WANNER

Project Management
with
SharePoint

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More Efficient

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Table of Contents

12 Appendix   77

Preface

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Make Your Project Management More Efficient

During an average eight-hour workday, project team members spend about 45 minutes looking for information on the network share, in the email inbox, in project folders – or the information is stored in colleagues computer or the file cabinet. This search for information could have been spent better for more productive project work. More time is lost by project team members due to poor document management practices, inefficient project communication standards and ineffective project collaboration tools.

Because of this dissatisfied situation, many companies implemented SharePoint as an essential tool to fight this inefficiency, to be more productive in teams in the line business and in projects.

This book gives responsible staff in program offices or project managers practical proven tips to set-up and customize SharePoint in a way to be more efficient in their projects and programs. It describes valuable information to solve common problems and pitfalls project managers, admin and users encounter. This book is not a guide to learn SharePoint from scratch, but rather deals with important functionalities relevant to project management.

Often a company has already defined templates for team sites and project sites that meet most of their purpose from base well. Although project team members and SharePoint admins often receive SharePoint training, the acquired knowledge is not enough set-up and use SharePoint really effective, especially for projects and programs.

SharePoint is an essential tool when it comes to managing information in projects, this might be in the simplest case project documents in document libraries as well as risks, issues, project calendars, etc. in SharePoint lists. If you work for example with Microsoft Project Server, you can

edit task lists in SharePoint and maintain SharePoint and Project in sync and you can also add different attributes to task lists.

I have set-up and administrated SharePoint project and program sites in various companies as a program office manager. But as a beginner, I had a rough start with SharePoint when I took over the program office at a large program in a bank some years ago. My predecessor left the company and I took over a half set-up and productive SharePoint site – and I myself never had worked with SharePoint before. In recent years I have learned quite a lot, how to effectively use and customize SharePoint for projects and know where mistakes often will be made.

Who Should Read This Book?

This Book is intended to make the life easier for project managers and project office staff, who have to set-up and administrate SharePoint sites in projects and programs.

Prerequisite to Use This Book

This Book is a summary of practical tips from my experience with Share-Point in projects in the recent years. I consider myself not a SharePoint expert but I am an expert in project management and know, how to use SharePoint to make projects more efficient.

The content in this book is aligned primarily to SharePoint 2010 but most of the content may also be used in **SharePoint 2013**

The content of this book should only complement information from other comprehensive SharePoint books and is not a guide to learn SharePoint from scratch. If you read this Book, I assume that you have already worked with SharePoint and you have more experience than a regular user, who only uploads documents to SharePoint and fills-out lists with project data.

This book is not complete and will be amended from time to time and it may contain grammatical and spelling errors because English is not my native language. I really appreciate when you report grammatical and spelling errors to info@rolandwanner.ch

Introduction

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SharePoint as a Project Management Information System

If you want a simple and cost effective solution for managing project information then a *Project Management Information System (PMIS),* built on SharePoint, is a good way to go.

As defined by the Project Management Institute (PMI), a PMIS is a standardized set of automated project management tools available within an organization and integrated into a system. In a perfect world, a PMIS will solve every project manager's nightmare: project information distributed in multiple locations and versions; status reports in e-mails; project schedules in a USB drive; forms and templates in the network share without traceability, audit trail or version control. In addition, a PMIS should support most, if not all, of the communication and collaboration needs of a project environment. Although the PMI does not specify which tools to use, SharePoint has become a primary tool in many companies for project and programs. It can be easily customized to meet the communication and collaboration needs of a project environment.

Objectives of Your PMIS

SharePoint's allows educated project managers and PMO's to create, manage and customize their own collaborative project websites. To work with SharePoint, users don't have to be technically savvy. They just need basic Windows and Microsoft Office skills and know how to use a browser.

The key objectives PMIS on SharePoint can meet are:

- Centralize project information: Project contacts, calendars, task lists, risks, issues, change requests, resource lists, documents, templates, forms and checklists.
- Facilitate Team Communication and Collaboration – including scheduling meetings, project announcements, jointly developing proposals and requirements, change requests and informally brainstorming project strategies.
- Streamline Project Reporting – by simplifying project tracking and status reporting.
- Integration with Microsoft Project Server: Plan within SharePoint directly or publish key deliverables from Microsoft Project to SharePoint.

Information Management in SharePoint

In SharePoint, you work primarily with lists and document libraries. Lists are primarily used for storing information. You can create custom lists, where you define the columns, their sequence and positioning. Documents Libraries are the main repository for organizing documents in SharePoint. SharePoint makes it easy to mass upload documents and then add project specific columns that can be used to group and filter and create customized views from this information. All document and list content in SharePoint can be indexed and accessed via a very powerful SharePoint search functionality.

Ensure Information Integrity

With SharePoint, the project manager can present the right, up-to-date data at the right time to the right audience. Some SharePoint features that can help the project manager to achieve this are:

Document Versioning: SharePoint's document libraries allows you to set up versioning, with major and minor revisions supported. This is useful e.g. for project requirements and project plans that will be reviewed and revised. Comments can be added when each version is saved. You can review the version history for tracking and recovery purposes.

Using the **check-out/check-in** feature, a document can be checked-out from a document library, thus preventing changes by other users until the document is checked-in again. The check-out/check-in feature helps to protect document integrity, which is critical in any project.

The **Content Approval** feature prevents users (other than the content contributor/author) from viewing documents until they have been approved by an "approver". The content contributor will be notified whether the content was approved, rejected or is still in a pending state. Approvals can be delegated by creating a special permission level and associating it with the document library.

Automatization with Workflows provides the capability to automate human-based workflow and approval processes. In a PMIS, the built-in three-state workflow can be used e.g. to automate the change control approval process. It enables collaboration by automating the movement or list items through a specific sequence of actions.

Streamline Project Reporting

SharePoint's presentation for different users is configurable using a customized home page and site pages. For a project sponsor or executive, a page can show configurable lists, containing e.g. project tasks and risks or issues. A list can be presented as a GANNT view (like MS Project), or a datasheet, or a calendar view. This allows you to present a simple project schedule graphically to senior management, based on the information needs of the decision maker. Custom views can then be applied personalized queries and reports.

SharePoint Alerts provide a convenient way to send email notifications about project information status based on specific criteria and frequency. Alerts can be applied to monitor changes in both lists and document folders.

Management Dashboards are an interactive summary that consolidates, aggregates and arranges project measurements, such as schedules and budget tracking. The dashboard is displayed on a single screen with drill-down facilities, so that key performance indicators can be monitored at a glance.

Dashboards are created using web parts, which are customizable software components, that are added on a page. Without any programming they provide features like :

- Displaying graphical or chart-based representations of high-level project information
- Allowing external information from other systems

Knowing that SharePoint has the capability to generate dashboards, it is important to identify what types of project information will be required by a specific stakeholder. If a project sponsor or customer requires a high-level schedule or budget information, you want to ensure that you have the appropriate source data lists in SharePoint.

Getting Started With a PIMS Based on SharePoint

A PMIS based on SharePoint should be designed to fit your organization's processes, as well as the type of project or program you conduct. SharePoint allows you to save a site structure as a template that future project sites can be based on. SharePoint comes shipped with some useful site templates as well. Your company may have already defined templates for SharePoint sites e.g. a template for Team Sites and a template for Project Sites.

A pilot project in SharePoint is an effective way to sell the benefits to stakeholders, especially when compared to existing tools and processes. The pilot adopters can then act as internal supporters and provide user support within the organization in learning, adapting and improving the utilization of SharePoint as a PMIS tool. Like in any project, provide a way for your users to give feedback about the PMIS. Allow them to provide comments on the usefulness of the PMIS, components that could be enhanced or should be removed.

Conclusion

SharePoint will not replace a project methodology, hands-on management and human communication. However, SharePoint is a great platform on which to build your project management infrastructure. It addresses the difficult task of making sure, project information and updates are transferred and received effectively by all appropriate team members, so that required actions can be taken.

The Architecture of Your Project SharePoint Site

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Planning of Your SharePoint Site Matters

SharePoint is easy to use and with it, anyone can quickly create a project site. Your company may have defined templates for SharePoint sites e.g. a template for Team Sites and a template for Project Sites. The template for the project site is often a good starting point for you, but don't rush into creating a project site, subsites, libraries, lists and content. Stop!

"If you fail to plan you are planning to fail."

Although SharePoint is easy to use, believe this proverb and before you start, do first some planning activities. First, you have to think about different topics and layout a plan for the implementation of your site. At least these questions you should ask yourself before starting any other activity

- Who's the target audience?
- Do you have a permissions strategy?
- How will permissions be governed?
- Is there any confidential info I need to protect?
- Access for anyone outside the company?
- Who's the Site Manager and his deputy?
- Is there more than one team involved?
- How will you document?
- How to navigate?

- What is your training plan?
- Do we need to migrate documents or lists?

And so on. You don't have to answer all these questions immediately. But the answers are part of your implementation strategy.

The first SharePoint Site in Your Company?

If this is the first SharePoint project site in your company, this book may help you a lot with project specific implementation tips and tricks.

In larger companies, there may be other projects with SharePoint sites. Ask the SharePoint admins of these sites for their lessons learned and recommendations how to implement a project site. This is always very helpful. If possible ask more than one admin to have a broader picture. I had to learn it from scratch and did a lot of mistakes. Don't do the same and use this opportunity!

Do I Need Only one Site or Subsites?

For most projects, even larger ones in the size of about 10m Dollar, usually a normal SharePoint project site is sufficient. But if you're a large program with several rather independent projects with the same overall goal, then it makes sense to define the main site with subsites for each project. This has the advantage that the individual project sites may have their own permission system and its own site administrator. The administrator of the program site is in this case then the site collection administrator. He can if necessary also administer the subsites.

How Many Libraries and Lists Should my Site Have?

If you, as an administrator, are responsible for setting up a SharePoint site for a project, you need to make some basic considerations right from the start. By defining the architecture of libraries and lists, you are laying the foundation for how well you can manage, process, and protect data later on.

The main elements you work within SharePoint are libraries and lists. Theoretically, a single document library for your entire project would be fine, and a list, e.g. for the risks and issues, and perhaps a list in which

you save the contact data of your project team. However, I quickly learned that a poor architecture of a project SharePoint site would compromise many possibilities in the medium term. If you throw everything into one pot (library) you will have difficulties later, especially when it comes to:

- keep the overview for larger projects
- Create areas of organization, responsibility or protected areas
- Organize/group documents and find them faster
- Grant read and contribute rights according to the principle of "need to know" and "need to contribute"

Example: In our program, only the user group "Program Management" and "StC" (Steering Committee) should have access to the StC documents, the group "Members" (the project team members) cannot see these documents. The Finance Planning documents should only be seen and modified by the group "Program Management". The "Risk and Audit[1]" group is allowed to see this. The group "Members" should not see them. Members of the group "Risk and Audit" are allowed to see all documents and information, but cannot change anything on the site.

This can only be achieved if you distribute the documents to different libraries and assign specific permissions to the libraries. Only one library for a project SharePoint site is not a good solution, as well as too many.

Recommended Libraries and Lists

If you distribute data to too many libraries, there is the danger that the evaluation, filtering, sorting of the libraries and lists is maybe no longer possible as desired. Be also careful to not store the same date in different libraries and list more than one time.

In a larger project or program, the following document libraries are typically useful:

- Document library for each larger sub-project or program stream
- Steering committee documents
- Finance planning documents
- Schedule planning documents

_____

[1] The company group risk and audit department

- Contracts/SOW's documents
- Change request documents (could also be made with a list)
- PMO documents (Project/Program Office)
- Communication documents (generally accessible)

The following lists are useful:

- Issue Log
- Risk Log
- Schedule change log
- Project contacts (contact information of team members, contractors with personal data such as notebook ID-number, phone number etc.)
- Project calendar
- Glossary

Below you see a schematic overview about the architecture of our program site. I suggest that you **start small** and add libraries and lists with the time when needed and when your program or project grows. It's also useful to draw a diagram like this to have a fast overview of your site architecture.
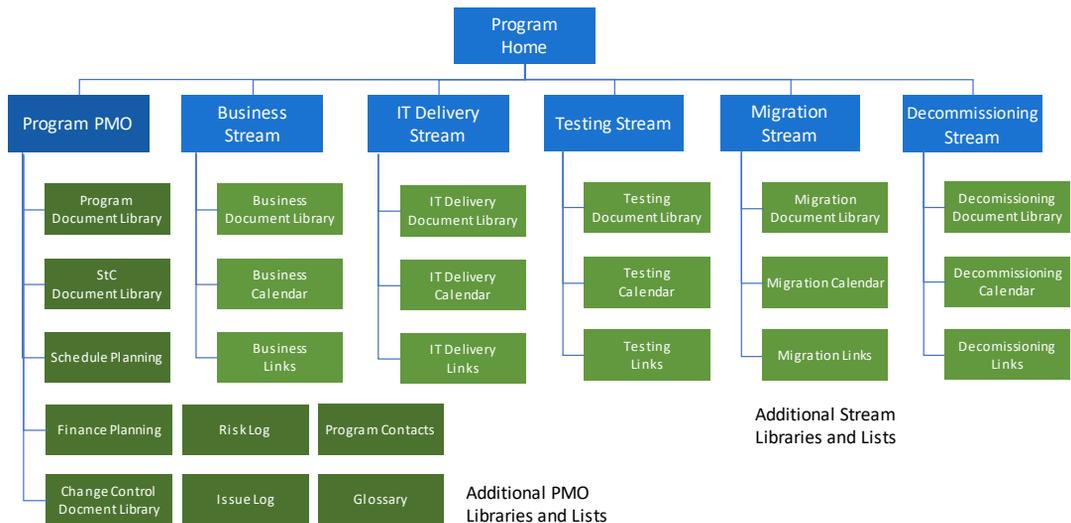
Figure 1: The architecture of a program site

Document Libraries for Sub-Projects or Streams

Depending on the size of your project or program, it might be meaningful to have separate document libraries for sub-projects. But be careful, if you have too many libraries or lists, it will be more difficult analyze, sort and filter data in your site.

In our program, I designed for each program stream a separate site page which looked similar to the program home page. I recommended the stream leaders to show certain content (lists and libraries) on these pages, because they often did not know what would be helpful for them and their team. Sounds strange, I know, but e.g. Steve Job said:

"Our job is to figure out what they're going to want before they do"

How to Use Groups and Permission

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The Challenges with Groups and Permissions

New SharePoint administrators often give the permission system a head-ache. I felt the same. It is normal that you need some time to understand this system, especially if you are not an IT-expert. Here you will find the most important points briefly summarized and additional tips to set-up groups and permissions for your project.

When you create a site, SharePoint automatically creates groups which can access the site and as-signs permission levels to the groups. These are known as the default SharePoint groups, because they represent the most common levels of access that users need. The default groups and their as-sociated permission levels are a good start when you add users to your SharePoint site.
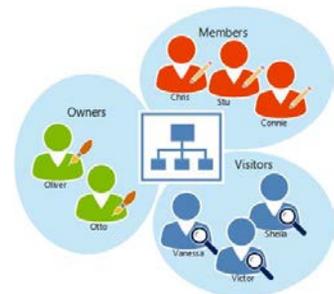
It is the responsibility of the site owner to define who can access the SharePoint site. The site owner specifies through the site permissions which type of access project team members have, which content site members can view and which actions they can perform within the site.

Group: Defines a certain group of people

Permission: Defines what the group members can do within SharePoint (read, contribute ...)

library is in this case the ideal tool to help you to manage the CR process. Provide each CR document with a CR number:

e.g. CR012_ModificationPrintingJob.doc

Type (Document type, e.g. Word)

Name (Document name)

Short Description	Multiple lines of text
Summary of Impact	Multiple lines of text
CR Type	Choice [New Requirement, Requirement Change, Architectural Change,
Handed-in to CCB	Yes/No (CCB=Change Control Board)
Category	Choice [e.g. CR of Project, CR of Operations]
CR Status	Choice [New, On hold, Approved, Rejected, Implemented]
Decision Date	Date and Time
Responsible	Person or Group
Requester	Person or Group

Contracts/SOW (Document Library)

Contracts and SOW's are normally not for all eyes and need to be stored in an separate, protected SharePoint Library. Give this library unique permission. We did not hyperlink this library in the Quick Launch menu to not lead the attention on it.

Name (Document Name, e.g. 20160412-SOW-IBMSoftwareEvaluation.doc)

Company	Single line of text (or Choice)
Year	Single line of text

There may be other meaningful metadata for you, maybe: Contract value, period, contact person etc.

Index