SharePoint and Project Management

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Minnesota Project Users Group
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MN SharePoint Users Group

- 2nd Wednesday of Every Month
- 9 a.m. to 11:30 a.m.
- Audience: SharePoint Users, Administrators, and Developers
- Held at the Microsoft Technology Center (MTC)

http://sharepointmn.com
Topics

• General Principals
• Tracking Projects
• Connecting to Documents
• Communications & Alerts
• Reporting & Dashboards
• Other Considerations
General Principals
Why SharePoint and Project Management?
Where Can SharePoint Help?

- Project Tracking
- Project Documents
- Metrics
- Communication
Crawl, Walk, Run

• Crawl
  ▪ Out of the Box Features
• Walk
  ▪ Integration with MS Project
  ▪ Third Party Tools
• Run
  ▪ MS Project Server
  ▪ Custom Development with Other Applications
Getting Started

• Same As Any Other Product
• Discovery
  ▪ What is the PMO Process?
  ▪ What types of projects is this helping to manage?
  ▪ Information Architecture/Taxonomy
  ▪ Document/Content Management
  ▪ Roles
• Implementation
  ▪ Documentation of Solution
  ▪ Training
Information Architecture/Taxonomy

• How is a user going to navigate?
• User Interface
  ▪ Single SharePoint Site Collection with all Projects
  ▪ Rolling Up Specific Content to Top Level
  ▪ Consistent Site Layout/Structure
• How is Content Divided Up?
  ▪ List/Library vs. Site/Sub-site
  ▪ Global and Local Navigation
Document/Content Management

- Content Types
  - Document Templates
- Workflows
  - Out of the Box
  - SharePoint Designer Custom
  - Third Party Vendor
- Site Columns
- Content Approval
- Check-Out
- Versioning
Project/SharePoint Roles

- Project Specific Roles
  - Project Manager
  - Project Team Members
  - Team Leads?
  - Executive Sponsor
  - Project Sponsor/Director
- SharePoint Specific Roles
  - SharePoint Owner
  - SharePoint Member
  - SharePoint Approver
  - SharePoint Visitor

<table>
<thead>
<tr>
<th>Project Role</th>
<th>SharePoint Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>Owner</td>
<td>Full Control</td>
</tr>
<tr>
<td>Project Team Members</td>
<td>Member</td>
<td>Contribute</td>
</tr>
<tr>
<td>Team Leads</td>
<td>Member &amp; Approver</td>
<td>Contribute; Approval</td>
</tr>
<tr>
<td>Executive Sponsor</td>
<td>Visitor</td>
<td>Read</td>
</tr>
<tr>
<td>Project Sponsor/Director</td>
<td>Visitor</td>
<td>Read</td>
</tr>
</tbody>
</table>
SharePoint Training

• Train Based on Roles
  ▪ Owners – Needs the Most
    • Permissions
    • Creating Sites
    • Document Management Features
    • Lists and Libraries
    • Web Parts
    • Much More
  ▪ Members
    • Adding Content Lists/Libraries
    • Adding Metadata
    • Creating Personal Views
    • Connecting to Office
  ▪ Visitors
    • Navigating Around SharePoint
    • Opening and Reading Documents
Tracking Projects
Project Sites

• FAB 40 Template - SharePoint 2007 & 2010
  ▪ Project Tracking Workspace
  ▪ Budgeting and Tracking Multiple Projects
  ▪ Change Request Management
  ▪ IT Team Workspace
• Team Sites (All Versions)
• Project Site (SharePoint 2013)
  ▪ Basic Team Site
  ▪ Automatically Includes Task list and Timeline
  ▪ Notebook – a.k.a. OneNote
Built In Lists

- Tasks List (All Versions)
  - Tracking Tasks
  - Predecessors Added in 2010
- Project Task List (All Versions)
  - Gantt View
  - Predecessors Added in 2010
- Calendars (All Versions)
  - Calendar Overlay Added in 2010
- Issues List (All Versions)
  - Bug Tracking
- Contact List (All Versions)
  - Contact Information
- Custom List (All Versions)
  - Milestones, Overall Project Master List
Access Services

• SharePoint Enterprise Version 2010 or 2013
  ▪ Tables, Queries, Forms, Reports
  ▪ Issues Web Database
  ▪ Projects Web Database
• SharePoint 2010
  ▪ Web Databases SharePoint Sites
• SharePoint 2013
  ▪ SharePoint Apps
  ▪ Need Access 2013
  ▪ Creates SQL Database per Access App
Microsoft Project 2010/2013

- Purpose for MS Project and SharePoint?
  - Synchronize Tasks
- MS Project 2010/SharePoint 2010
  - Create or Overwrite Task or Project Task List
  - Tasks and Subtasks Difficult
  - Create Custom Fields in MS Project
    - Map Fields to SharePoint
- MS Project 2013/SharePoint 2013
  - Create or Overwrite Task or Project Task List
  - Tasks and Subtasks are Separate and Easy to Use
  - Create Custom Fields in MS Project
    - Map Fields to SharePoint
Demo

- SharePoint Site/List Options
- MS Project Integration
Connecting to Documents
Document Management Features

- Ensure One Version of the Truth
- Content Types/Site Columns (SharePoint 2007-2013)
  - Document Templates
  - Metadata
  - Persistent Workflows
  - Document Sets (SharePoint 2010 & 2013)
- Content Approval (SharePoint 2007-2013)
  - Not Available Until Approved
- Check-Out vs. Collaboration (SharePoint 2007-2013)
  - Check-Out on Documents Only
  - Office Web App/Office Co-Authoring Capabilities
- Versioning
  - Major and Minor
  - Number of Versions Retained
Connecting to Tasks

- Used to Relate Content (Lists and Libraries)
- Lookup Column (SharePoint 2007-2013)
  - Connects Lists Relationally
  - Enforce Relationship Behavior (2010 & 2013)
  - Limited to the SharePoint Site
- Displaying Tasks/Associated Documents
  - Web Part Connections – Web Part Pages
  - Default Display Form
Demo

- Project Content Types
- Document Management Settings
- Associating Tasks and Documents
Communication & Alerts
Alerts

- Very Powerful and Most Overlooked Tool
- Automatically Communicating Activity
- SharePoint Alerts
  - List/Library Level
  - Item/Document Level
  - Search Level
- Options Include
  - Users
  - Send Alerts for These Changes
  - When to Send Alerts

MOST IMPORTANTLY – YOU CAN SIGN SOMEBODY ELSE UP!
Workflows – Out of the Box

• Add Automated to and Existing Business Process
• Used to Communicate or Effect Document Lifecycle
• Workflows Include:
  ▪ Approval
  ▪ Collect Feedback
  ▪ Collect Signatures
  ▪ Three-state
  ▪ Disposition Approval
  • Information Management Policy
Custom Workflows

• SharePoint Designer 2007 – 2013
  ▪ Advanced Workflows to Alert to Interact with Content
  ▪ Conditions & Actions
  ▪ Stages &
• SharePoint Designer 2010/2013 and Visio
  ▪ Workflow Visualization
• Third Party Vendors
  ▪ Nintex
  ▪ K2
Other Communication

- Real Simple Syndication (RSS Feeds)
  - Subscribe to RSS Feed
  - RSS Feed Readers
- Connecting to Outlook
  - Tasks
  - Calendars
  - Contacts
- SharePoint Workspace 2010
- SkyDrive (SharePoint 2013)
- Tags and Notes (SharePoint 2010 – 2013)
  - Tag Content, Lists/Libraries or Pages
- Following (SharePoint 2013)
  - Followed Content is Available in My Site
Demo

- SharePoint Alerts
- Out of the Box Workflows
- Following
Dashboards
Web Parts & Views

• Quick Look at Important Info
• Can Display

<table>
<thead>
<tr>
<th>Project Need</th>
<th>SharePoint Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Tasks on Project Site</td>
<td>List Web Part with View Filtering by User or My Tasks (SP 2013)</td>
</tr>
<tr>
<td>Tasks Displayed on Calendar</td>
<td>Calendar View of the Task List</td>
</tr>
<tr>
<td>Relevant Documents to User</td>
<td>Web Part Relevant Documents</td>
</tr>
<tr>
<td>Key Metrics</td>
<td>Excel Services (Enterprise 2007 – 2013)</td>
</tr>
<tr>
<td>Project Status</td>
<td>KPI or Status List (Enterprise 2007 – 2010)</td>
</tr>
<tr>
<td>Aggregated Tasks or Documents</td>
<td>Content Query Web Part, Content Search Web Part, or Search Scopes</td>
</tr>
</tbody>
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Task Aggregation

- SharePoint 2013 Features
- My Tasks
  - Aggregate Across All SharePoint
  - Include Tasks From Exchange 2013
  - Include Tasks from Project 2013
- Different Views
  - Important and Upcoming
  - Active
  - Completed
  - By Task List
Resources

- SharePoint 2007 FAB 40
- SharePoint 2010 FAB 40
- Microsoft Office – SharePoint and Project
Thank You!