

# Managing Projects on a Shoestring Part 1: SharePoint Online

Have you ever wondered if you can effectively manage projects without breaking the bank? Projects come in many sizes and forms. Most systems have a sophisticated multi-project/program planning component, risk and issues, and more. All these bells and whistles often carry a hefty price tag. For enterprise use. But if you're a small or medium size business who doesn't have the need for such complexity, SharePoint Online and Office 365 are great alternatives at the fraction of the price. In the first part of this series,

## A lean Project Management that meets your needs



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the work you do falls into the small to medium size projects, I described above, then the information is similar to the following table:

Artefact	Description
Project plan	Typically in the form of a GANTT chart, the project plan provides a time-based overview of tasks. Tasks usually will include a duration and/or effort, individuals who are assigned to tasks, and dependencies.
Risks and Issues Log	The Risks and Issues log allows project stakeholders to see if there is anything that could impact the project. It's always good to keep such a list as its own entity rather than burying this information somewhere else.
Decision Log	As a project lead you may not make all the decisions. But you should definitely keep a record of the rationale behind them, and who made the decisions.
Status Reports	No one likes creating them, but every project manager has to. Depending on the stakeholder's requests they can vary from a short description of an overview to a detailed report on progress and issues, decisions, and more.
Project Documents	Any artefact created for the project, including requirements documents, design documents, reports, training manuals, and more
Minutes	Keeping track of what happens in meetings is a good way to avoid misunderstandings and ensure everyone is on the same page.
Calendar	Good way to keep track of important events such as project milestones and people's availability.

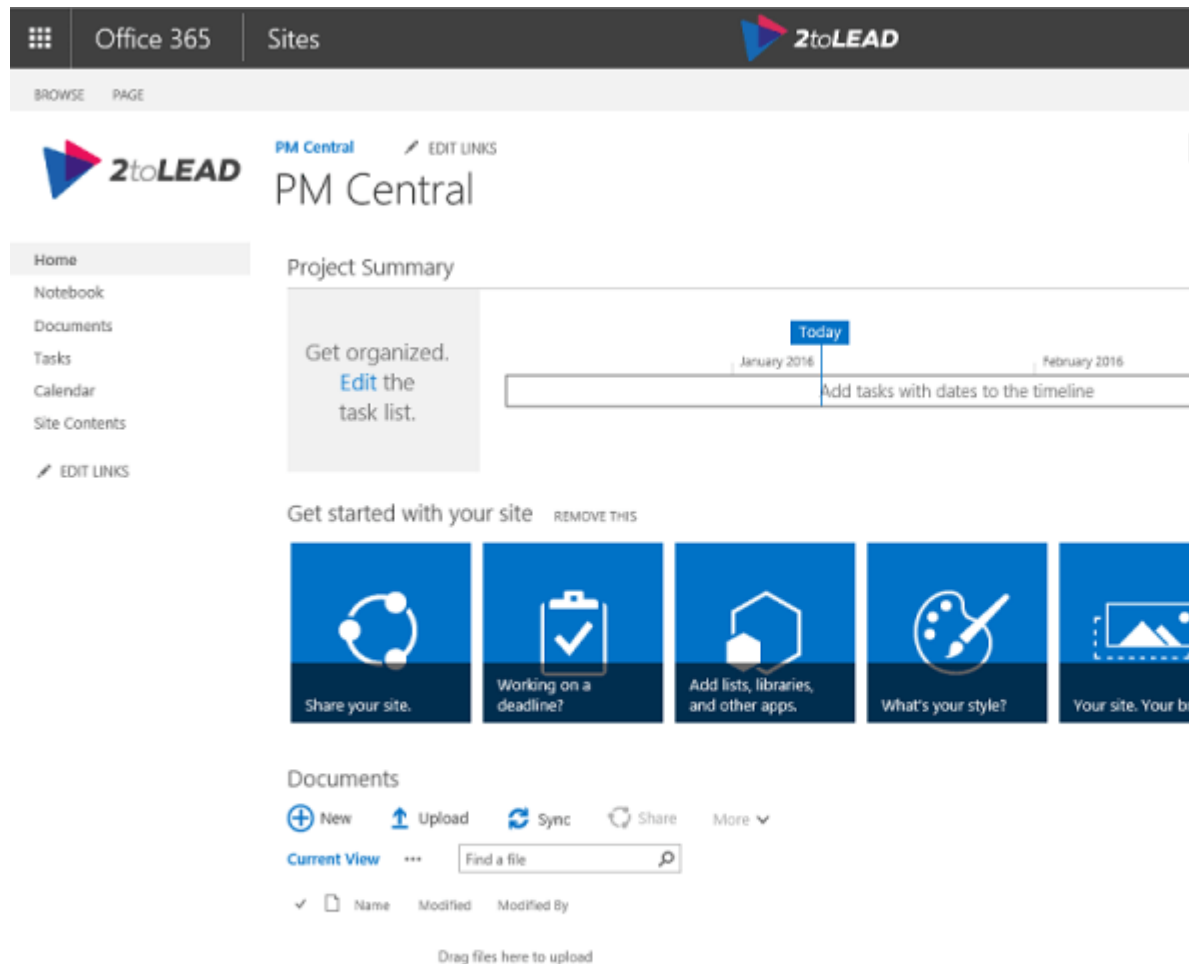
Having worked with various sizes of projects, I assure you that all these artefacts are forms of communication that are adequate/sufficient to inform stakeholders, sponsor, and team members on project progress. They are in the form of emails, meetings, and documents. Many times I've witnessed such communication being ineffective, poor access control and audit trails, lack of content consistency and adherence to project requirements, and ineffective team collaboration.

# SharePoint Online as a Project Management System



If your organization uses any of the Office 365 Business plans then you already have what you need for a Project Management System without spending any additional costs to your organization!

Not only does SharePoint Online work great with other Office 365 apps, but it also makes setting up a new project collaboration environment a breeze. Here's what it looks like with the template.



A new project site will contain the following useful apps:

## Tasks

Tasks is used to manage the project tasks. If you are also using Microsoft Project 2013 or newer you can sync tasks with Microsoft Project in SharePoint Online.



## Calendar

Calendar is a task list that can also be synchronized with your Outlook calendar so you can receive alerts at

# Documents

This is the default document library that you can use to store the project artefacts.

# OneNote

OneNote app is created for each site. This is an amazing way to capture your meeting minutes, create tasks, and even email a page which greatly simplifies the entire note-taking process.

# Project Summary

This is a visual web part that provides site visitors with a timeline and overview of any late or upcoming tasks.

The screenshot displays a SharePoint web part interface for 'PM Central'. At the top, there is a navigation bar with 'Office 365' and 'Sites' links, and a '2toLEAD' logo. Below this is a secondary navigation bar with 'BROWSE' and 'PAGE' options. The main content area features the '2toLEAD' logo and the title 'PM Central' with an 'EDIT LINKS' option. A left-hand navigation menu includes 'Home', 'Notebook', 'Documents', 'Recent', 'Decision Log', 'Risks & Issues', 'Tasks', and 'Site Contents', each with an 'EDIT LINKS' option. The central 'Timeline' section shows a Gantt chart with tasks: 'Kick-off and Planning' (9/28 - 10/19), 'SharePoint 2013 QA Environment Creation' (10/6 - 10/20), 'Pre-deployment' (10/7 - 10/16), 'Setup environment' (10/8 - 10/14), 'SharePoint 2013 L...' (10/15 - 10/20), 'Content Migrati...' (10/30 - 11/4), and 'Content Mi' (11/5 - 11/21). Below the timeline is a 'Shared Documents' section with buttons for 'New', 'Upload', and 'Share'. It lists five documents: '2015.10.06.Knowledge Centre IA', 'Access your Project Site', 'Admin Guide', 'Build Phase Project Kickoff', and 'Deployment Guide', all modified 5-7 minutes ago by 'MOD Administrator'. To the right is a 'Decision Log' section with a 'new item or edit this list' button and one entry: 'Launch date postponed by 2' and 'New intranet will need a resp...'. A circular arrow icon is visible in the bottom right corner.

RISKS & ISSUES

[+ new item](#) or [edit this list](#)

Issue ID	Title	Assigned To	Issue Status	Priority	Due Date
1	Integration with ERP not working	Rob Young	Active	(2) Normal	10/29/2015 12:00 AM

After creating the project site you should add some additional lists to help you track all the info

Name	App Type	Description
Risks & Issues	Issue Tracking	Using the out of the box Issue Tracking list will give you all the information assignment, priority, other risks it relates to, and a due date. If you prefer create two separate lists based on the Issue Tracking App Type as the f
Decisions	Custom List	For this list you should add the following new columns: <ul style="list-style-type: none"> <li>• Description (Multiple lines of text)</li> <li>• Decision date (Date and Time)</li> <li>• Decision made by (Person)</li> </ul>

This article by Microsoft summarizes the process to create the lists and add columns to them.

As you can see, with only a few simple configurations to an out of the box SharePoint Online project management system up and running in no time without any additional costs.

# SharePoint Online Advance

What I've discussed above is only the tip of the iceberg when it comes to SharePoint. By going number of key components to further improve how you manage the content and communication

## Add Metadata



When you created the Decisions log then you should be familiar with metadata. Each column represents covering content through search. It can also be useful for grouping or filtering a large set of

project with a large number of artefacts you may want to group them by project phase or other

## ending links and turn on Versioning

Managing project artefacts may sound like a simple task but is often the cause of many problems. Multiple copies of the same document are emailed and edited by various individuals. When it comes to versioning, sometimes lost. Even if there is only one copy that exists, if the version is stored in a central location, a new version of the document will overwrite what was there before.

When *Versioning* is turned on for a library, a new instance of the document is saved each time a new version is created. This allows you to view previous versions and revert to an older one. You should also advocate the practice of emailing documents themselves. Not only will IT love you for not taking up the bandwidth and filling up the server with multiple copies of the same document, but you're also ensuring that everyone is accessing the latest version of the master copy of the document. Following this practice will also prevent cases where documents are inadvertently deleted and you would not have access to the documents.

## Alerts

As a project lead you should always know what's happening on your project as soon as possible. Alerts and lists ensures you're always informed of changes happening (see my other article on How to Set Up Alerts in SharePoint 2015 to learn more about this topic) and avoid the embarrassment of having other stakeholders

Once you've set up the project site the way you like you can save it as a template and reuse it for future projects. This helps in creating consistency and reduce the time it takes to find information. As you can see, it doesn't take long to set up a SharePoint Online as a PMS that can meet a majority of your needs. Find out more on how to use SharePoint Online for managing project in the next parts of this series.

Managing Projects on a Shoestring Budget – Part 2: SharePoint Online for Agile Projects (coming soon)  
Managing Projects on a Shoestring Budget – Part 3: The full experience with SharePoint Online (coming soon)

This article builds on the whitepaper *When To Use What in Office 365* that has been written to help you accelerate their usage of Microsoft technologies like Office, Outlook, Exchange, Lync, Skype for Business, and SharePoint. In this white paper you will find guidance, insights, and recommendations that are based on experience from a wide variety of industries and organization sizes. While it may not answer every question we host, it covers the most important ones, and equips you better to motivate and drive better usage of Office 365 in

Download the whitepaper here 

Business Design

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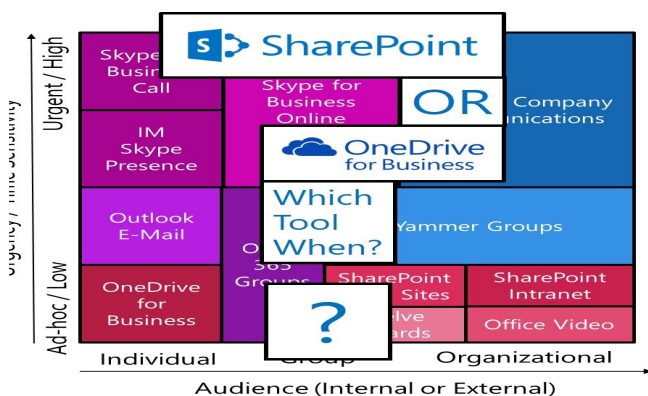


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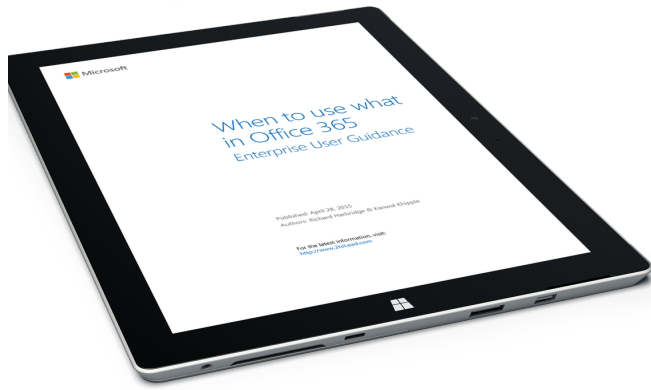
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- Camille M., Dun and Bradstreet

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