Managing Projects on a Shoestr
Part 1: SharePoint Online

ave you ever wondered if you can effectively manage projects without breaking the bank? Pro
any sizes and forms. Most systems have a sophisticated multi-project/program planning comp
sk and issues, and more. All these bells and whistles often carry a hefty price tag. For enterprise
ense. But if you're a small or medium size business who doesn't have the need for such comple
nline and Office 365 are great alternatives at the fraction of the price. In the first part of this se

A lean Project Managemen
that meets your needs

the work you do falls into the small to medium size projects I described above, then the infor

the work you do falls into the small to medium size projects, I described above, then the infor
milar to the following table:

| Artefact	Description
Project plan	Typically in the form of a GANTT chart, the project plan provides a time-based o Tasks usually will include a duration and/or effort, individuals who are assigned t
Risks and Issues Log	The Risks and Issues log allows project stakeholders to see if there is anything th It's always good to keep such a list as its own entity rather than burying this info somewhere else.
Decision Log	As a project lead you may not make all the decisions. But you should definitely k 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 and issues, decisions, and more.
Project Documents	Any artefact created for the project, including requirements documents, design c reports, training manuals, and more
Minutes	Keeping track of what happens in meetings is a good way to avoid misunderstan
Calendar	Good way to keep track of important events such as project milestones and peo

aving worked with various sizes of projects, I assure you that all these artefacts are forms of cc
dequate/sufficient to inform stakeholders, sponsor, and team members on project progress. T
e form of emails, meetings, and documents. Many times I've witnessed such communication
ontent, poor access control and audit trails, lack of content consistency and adherence to proje
xperience, and ineffective team collaboration.

SharePoint Online as a Proj Management System

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

ot only does SharePoint Online work great with other Office 365 apps, but it also comes instal
akes setting up a new project collaboration environment a breeze. Here's what it looks like wh
te template.
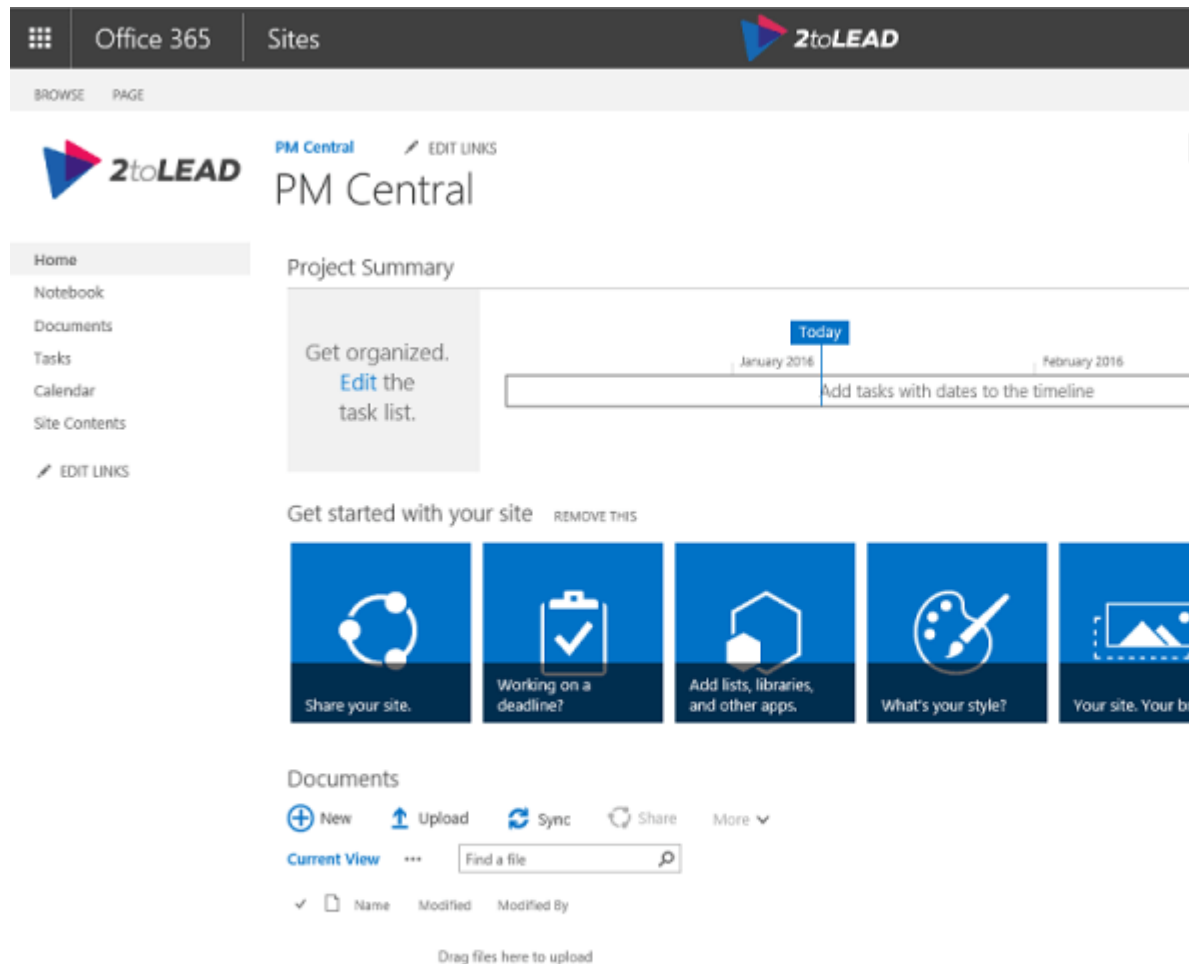
new project site will contain the following useful apps:

asks

st used to manage the project tasks. If you are also using Microsoft Project 2013 or newer you
harePoint Online.

alendar

ents list that can also be synchronized with your Outlook calendar so you can receive alerts al

Documents

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

Notebook

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

Project Summary

his is a visual web part that provides site visitors with timeline and overview of any late or upcc

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

fter 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 informa assignment, priority, other risks it relates to, and a due date.If you prefe 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: • Description (Multiple lines of text) • Decision date (Date and Time) • Decision made by (Person)

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

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

SharePoint Online Advance

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

Add Metadata

⬆

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

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

ending links and turn on Versioning

anaging project artefacts may sound like a simple task but is often the cause of many problen
ultiple copies of the same document are emailed and edited by various individuals. When it co
e sometimes lost. Even if there is only one copy that exists, if the version is stored in a central
ersion of the document will overwrite what was there before.

'hen *Versioning* is turned on for a library, a new instance of the document is saved each time t
evious versions and revert to an older one. You should also advocate the practice of emailing
ocuments themselves. Not only will IT love you for not taking up the bandwidth and filling up
ocument, but you're also ensuring that everyone is accessing the latest version of the master c
e document. Following this practice will also prevent cases where documents are inadvertently
ould not have access to the documents.

lerts

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

nce you've set up the project site the way you like you can save it as a template and reuse it fo
eating consistency and reduce the time it takes to find information. As you can see, it doesn't
harePoint Online as a PMS that can meet a majority of your needs. Find out more on how to u
anaging project in the next parts of this series.

anaging Projects on a Shoestring Budget – Part 2: SharePoint Online for Agile Projects (comin
anaging Projects on a Shoestring Budget – Part 3: The full experience with SharePoint Online i

his article builds on the whitepaper When To Use What in Office 365 that has been written to h
ccelerate their usage of Microsoft technologies like Office, Outlook, Exchange, Lync, Skype for
hite paper you will find guidance, insights, and recommendations that are based on experienc
ide variety of industries and organization sizes. While it may not answer every question we ho
ost important ones, and equips you better to motivate and drive better usage of Office 365 in

Download the whitepaper here ⬇

Business   Design

How To Get Notified About What is included In Office 365

Man

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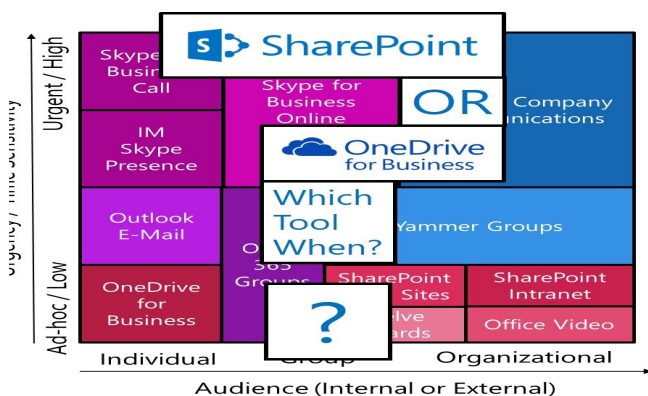Your full name

E-mail address

Website

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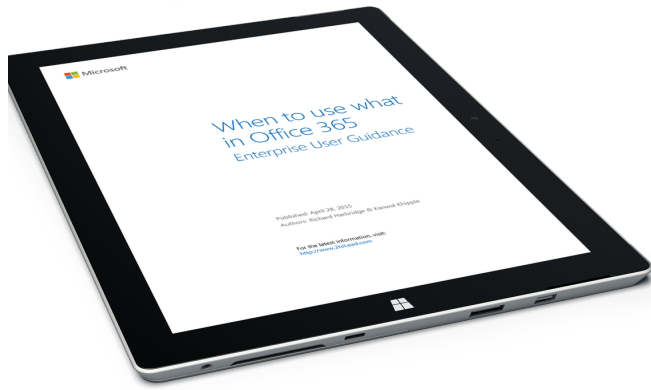
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BRIDGE

the technology gap

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