

# SharePoint Online

for  
Project Management



How to Make Your Project  
Management More Efficient

2022 Edition

incl. eBook



ROLAND WANNER

# SharePoint Online

## For Project Management

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How to Make Your Project  
Management More Efficient



ROLAND WANNER

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# Preface

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**P**roject management is a vital business activity to create new products and services to secure the future of the business of companies, but also to execute large maintenance activities doing reorganizations or acquisitions.

The Project Management Institute (PMI) defines project management as ‘the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.’ The purpose of effective project management is delivering a positive change for your organization or customers.

Project Management is not getting any easier! Projects are becoming more and more complex; requirements are changing faster and faster and collaboration and information management in projects is more needed than ever. Projects fail every day with serious consequences for the financial stability and reputation of organizations. The causes of project failure are numerous. Here are the main reasons:

- No clear business goals
- Unclearly defined and not approved requirements
- Often neglected or even non-existent risk management
- Poor project planning
- Poor user involvement
- Ineffective task tracking and information management
- Insufficient cost monitoring & control
- Lack of project data visibility
- No tool or process for managing projects information
- Poor communication

With SharePoint, you can't save your project from failure, but good collaboration and information management has its essential contribution to make your project more successful—and here is SharePoint a great help.



## **Make Your Project Management More Efficient**

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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 colleague’s 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.

### **Essential SharePoint Knowledge for Project and PMO Managers**

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 in 2010. My predecessor left the company, and I took over a half set-up and productive SharePoint site—and I never had worked with SharePoint before. Can you imagine how I felt and how steep my learning curve must have been? 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

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

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 basic SharePoint training, the acquired knowledge is not enough to set-up and use SharePoint really effective, especially for projects and programs.

## What SharePoint Offers for Project Management

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As a project is a highly collaborative activity, it's a no-brainer to use SharePoint for project management. Think about common project management challenges—no process, lack of visibility, multiple versions of the same document, documents difficult to find, poor communication and so on.

Using SharePoint to bring all project information and tasks into one central place can resolve many of these problems. The project site can be structured to match your project approach, helping to standardize project delivery and improve visibility.

SharePoint has a number of elements suited to effective project management, e.g.: document libraries, lists, workflows, webpages, calendars sites and site collections. A SharePoint site acts as a home for your project information and documents. A SharePoint site collection collates multiple projects sites into a program or a portfolio.

*A SharePoint site brings all project information into one central location, making collaboration, communicating information, analyzing data, and reporting much easier.*

## Who Should Read This Book?

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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 gives you comprehensive knowledge on how to effectively use SharePoint in projects. I'm an expert in project management and know, how to use SharePoint to make projects more efficient. In this book I give you many practical tips from more than 12 years' experience with SharePoint in projects and programs.

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.

I also assume that you have good project management knowledge and already worked for some time in projects or programs.

## **Even More Knowledge From the Internet**

In this book, I often cannot go too deep into detail on many topics. Therefore, you will find hyperlinks at the end of many sections or chapters that refer to the best content on the internet that further deepens the topic.

In the paperback version of the book, it is not possible to click on the hyperlinks. Therefore, you will find all hyperlinks published in this book on this page:

<https://rolandwanner.com/sharepoint-online-resources/>

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# A Project With SharePoint



**T**his chapter will give you a good background about collaboration in projects and about SharePoint, even if you have previous experience with SharePoint as a project manager or project office manager. Especially if you are using an older version of SharePoint, this chapter will show you how SharePoint evolved and what the latest version of SharePoint can do better.

## Collaboration in Projects

More than 30 years ago, when I worked on my first project, the term "collaboration" was not present. At that time, people still worked in department silos and had their information mostly on paper in folders and later on in shared drives to which only a few had access. But collaboration has always been important in projects. Implementing projects without collaboration is not possible. Even the construction of the pyramids more than 2000 years ago would not have been possible without close collaboration.

Collaboration got a new boost in the 80s and 90s when multifunctional project teams worked closely together in product development. With

agile project management, team collaboration has become even more important.

The support of computers and software has made information management in projects much more efficient during the last 20 years. And a further step was the replacement of shared drives for information storage by collaboration software such as SharePoint. Collaboration Software is not the holy grail in project management which makes all project a success, but it is an essential part to support your way to a successful project.

## The Five Stages of Collaborative Project Management

Collaborative project management helps individuals from different departments, teams, and locations work together to deliver a project successfully. Collaborative project management encompasses five stages:

### 1. Initiate the Project

Starting your project the right way creates the foundation for the work to come. During this stage, you will start to work with your project sponsor, decide on how to manage the project, and you start to create the SharePoint site for your project.

You'll need to:

1. Create a project charter with the project objectives, the scope of work, timelines, project management approach and so on.
2. Get the project approved, sponsored, and resourced.
3. Create a SharePoint project site and define an initial structure for your project site and save the documents there.

### 2. Setup and Plan the Project

1. Plan the project and create the first rough schedule together with your project team.
2. Desk check the project plan and schedule with your sponsor. Update tasks and timelines as needed.

3. Conduct a kick-off meeting with your stakeholders.
4. Give your team a short training and guidelines on how to use the SharePoint Site.

### **3. Work the Project**

During **project execution**, help your team to:

1. Store all project information on your SharePoint site that it can be easily found.
2. Execute the project work
3. Update project information quickly using various documents, lists and reports in the project site.

### **4. Track and Re-Plan the Project**

Projects rarely run according to plan, making it essential to continuously track and re-plan the project. For a project manager re-planning is a key project management activity as work progresses.

To track and re-plan your project:

1. Check and analyze the status of the project using project schedules, task lists and financial data.
2. Manage risks, issues and change requests.
3. Re-plan the project by updating tasks and reporting project status.

### **5. Close the Project**

The more you learn from the project you have just completed, the more successful you will be with the next project you are about to start.

Once the project is completed, you have to formally close the project.

1. In your project site, check if all tasks, risks and issues are closed, and update any relevant documents in the project site.
2. Run a last project retrospective with the team and add a Lessons Learned document to the site.
3. Archive the site according to your company's guidelines.



Now that you've read about collaborative project management, it's time to learn why SharePoint is a great project management tool.

## Create and Manage Your Own Collaboration Solutions

SharePoint allows individuals, teams and projects in an organization easily create and manage their own collaborative solutions. According to the dictionary, collaboration means: "The situation of two or more people working together to create or achieve the same thing". In the business world, these can be various activities, projects or line activities. Without structured, quickly retrievable information, no business activity is possible and here SharePoint supports especially when it comes to teamwork. But it also offers the possibility to create an intranet in the company.

SharePoint, in connection with other Office 365 programs, manages and presents the information of a project in a structured and intelligent way and ensures that users can find and edit information quickly. This includes not only documents, but also lists such as risk logs, address lists, task lists, calendars, news, etc.

## Abandoning Shared Drives

SharePoint is supposed to replace Shared drives, i.e., known as a Network File Share, especially in the collaborative environment. Shared drives have a rigid structure with many folders and subfolders, which only gives one view of the data and is often only understood by the creator of this folder structure. Many long-time users of such shared drives understandably have problems to get rid of them—until after a few weeks they no longer want to be without SharePoint. It was the same for me!

For more information on why you should not use folders in SharePoint, see 91.

## How SharePoint Evolved

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SharePoint came on the market in 2001 and has changed a lot in the last few years, on the one hand in the visual appearance, but also the functionalities have become more comprehensive and easier to use. The further development of web content management systems (such as WordPress) also had an essential influence on the design and usability of the latest SharePoint version. These are e.g., responsive design (the page content can be displayed ideally on different devices, e.g., on PC, tablet or mobile phone) or websites can be created more easily and intuitively.

SharePoint has changed dramatically over the last 20 years. But today you still encounter at least three versions in companies.

### From SharePoint 2010 to SharePoint online

SharePoint was launched in 2001 as a web-based collaborative tool and is now used by over 400,000 customers in 250,000 organizations worldwide, including 85% of Fortune 500 companies.

Major successive versions have been:

- SharePoint Server 2010
- SharePoint Server 2013
- SharePoint Online
- SharePoint Server 2019

In October 2018, SharePoint Server 2019 was released. Key to this latest release is an alignment of SharePoint On-Premises with SharePoint Online.

SharePoint is now (year 2020) available as a server-based On-Premises solution, a cloud-hosted solution, or a hybrid solution, which combines an On-Premises installation with Office 365.

Unlike Word or Excel, SharePoint is not a single tool. Instead, SharePoint is a collection of tools designed to help organizations build intranets, manage documents, and collaborate in a secure environment.

## Typical Lists and Libraries for a Larger Project

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

- 1 Site page (Homepage)
- 1 Site page for each Subproject
- 1 Document library for the Project Office
- 1 Document library for each Subproject (if useful)
- 1 Document library for site pages (the homepage and the sub homepages belong here. This library is created by default.
- 1 Document library “Administration” (Time reports, NDA’s, On/off-boarding Documents, reports for portfolio management, etc.)
- 1 Document library “Finance Planning” documents
- 1 Document library Contracts/SOW's documents
- 1 Document library for Steering Committee documents
- 1 Document library for Change Request documents (could also be done with a list)
- 1 Document library for Work Package Descriptions
- 1 Document library for Communication Documents
- 1 Document library for Pictures
- 1 List for Risks (Risk Log)
- 1 List for Issues (Issue Log)
- 1 List for the Project Glossary
- 1 List for project team Contact Information (contact information of team members, contractors with personal data such as working area, laptop ID-number, phone number etc.)
- 1 Project Calendar

I suggest 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 of your site architecture where you can identify all elements of your site and see which one unique permission have.

## Document Libraries for Subprojects or Streams

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Depending on the size of your project or program, it might be useful to have separate document libraries for subprojects or program streams (like the IT team, the business team, the test team etc.). But be careful. If you have too many libraries or lists, it will be more difficult to analyze, sort and filter data within your site as a whole.

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 (calendar, communication, extracts of lists and libraries) on these pages. Every program stream had also its own document library. Documents shared by the project streams should be in a common library.



# How to Use Groups and Permission

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**S**harePoint Groups and Permission are probably the most difficult topic to understand in SharePoint and a big challenge for people who have to deal with it for the first time. However, it is essential that you understand this very well so that everyone has the rights they need on your site according to the "need to know" principle and to protect their data accordingly.

## The Challenges with Groups and Permissions

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This is a hard topic! New project SharePoint administrators often give the permission system a headache. I felt the same in 2010. It is normal that you need some time to understand this system, especially if you are not an IT-expert. And that's not all, the new SharePoint Online edition mixes up the old SharePoint permission system with Microsoft 365 Security Groups. In this chapter you will find the most important points briefly summarized and with additional tips to set-up groups and permissions for your project.

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.

When you create a site, SharePoint automatically creates SharePoint groups which can access the site and assigns 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 associated permission levels are a good start when you add users to your SharePoint site.

These SharePoint groups are empty at the beginning and have to be filled with persons or groups of persons in the further course. Only the owner group already contains one person - you as site owner. These two terms you should remember

**Group:** Defines a certain group of people

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

## The Different Groups Used with SharePoint

The move from SharePoint on-premises to SharePoint Online provides you with many challenges – but also opportunities. One of the non-technical changes is the transition to a new world of Microsoft 365 permissions, where traditional SharePoint permissions are replaced in many cases by Microsoft 365 Groups. This throws up many questions in the minds of those who have run SharePoint on-premises deployments and who might be used to customizing permissions.

The **SharePoint Online security model** includes the ability to control granular access to most aspects of SharePoint Online from the site level down to the item level. Access to the different items of SharePoint can be granted to specific users as well as to groups of users.

Traditional SharePoint includes three primary groupings of permissions, that being permission granted:

- to individual users (not really a group)
- by Active Directory Groups: Permissions granted to a group of users where the group membership is maintained by Active Directory (AD)
- by SharePoint Groups: permissions granted to a group of users where the group membership is maintained by SharePoint
- by Microsoft 365 Groups: Only available in SharePoint Online, these groups are maintained by Azure Active Directory

SharePoint Online *Modern team sites* in particular are connected to Microsoft 365 Groups, but also the traditional SharePoint Groups can be used here.

## Standard SharePoint Groups and Their Permission Level

By default, SharePoint includes the following predefined user groups with this standard permission:

Group	Permission
Owners	Have administrator permission ( <i>Full Control</i> )
Members	Have <i>edit</i> permission
Visitors	Have only <i>read</i> permission

These user groups with the predefined permission levels are automatically assigned/inherited from your site to sub-sites, to the document libraries or lists you create.

## SharePoint Online Grouping Options

SharePoint Online continues to provide both *SharePoint Groups* as well as security groups maintained by Azure Active Directory. Microsoft



365 provides a third grouping option for SharePoint, *Microsoft 365 Groups*.

Microsoft 365 Groups are similar to security groups, although Microsoft 365 Groups include many additional benefits. Microsoft 365 groups are a security/membership group tied to various Microsoft 365 tools and apps and are provided a group email address as well as additional tools such as a group calendar, notebook, Planner, and a SharePoint team site. Users assigned to a Microsoft 365 Group may also be classified as either a group owner or a group member, in comparison to security groups where all group members have equal access under the group.

[Sharing and permissions in the SharePoint modern experience](#)

## Permission Levels

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The permission level in SharePoint determines what the user can do with the content on your SharePoint site or elements of it. Each permission level has a set of permissions associated with it, based on the intended roles for that level. For example, the *Members* group has the edit permission level by default.

When you create a new site, SharePoint will create three standard Groups with attached permission levels (see Figure 7) As a site owner, you can choose which permissions are associated with each permission level (except for Limited Access and Full Control, which cannot be customized) or add new permission levels to combine different sets of permissions.

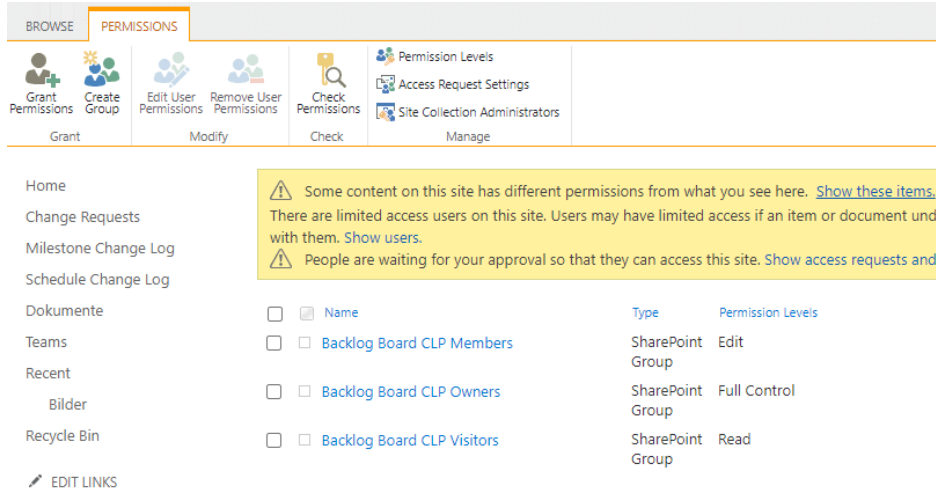


Figure 7: Standard SharePoint Groups with Permission Levels

For larger sites it may be useful to have additional groups and permission levels that are tailored to the purpose of the site. I recommend you for the beginning to use the predefined SharePoint groups and permission level and adjust it later if necessary.

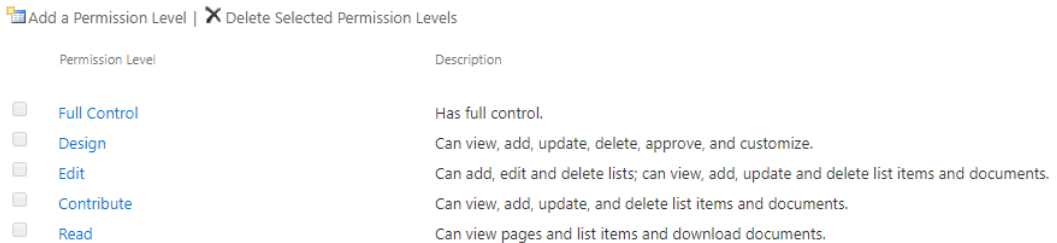


Figure 8: Standard Permissions Levels

**Full control:** This permission level contains all permissions. This permission level cannot be customized or deleted. By default, the site owner has this permission. Any user with full control can add, update, and delete site components, site members, and list content.

**Design:** This permission level allows users to customize pages, as well as to add, update, and delete list and library content.

**Edit:** This permission level was introduced with SharePoint 2013 as the default permission level for Members. They can add, edit and delete lists; can view, add, update and delete list items and documents. This is unfortunate and can be changed. More about this later.

**Contribute:** This is the most common type of permission granted to project team members. Users with this permission level can add, update, and delete list and library content.

**Read:** This level grants read-only access to the site. This is fine for Stakeholder, who not need to create information, e.g. Group Audit, Steering Committee and Senior Management.

**Limited Access:** This level is automatically assigned by SharePoint. You cannot assign Limited Access permissions directly to a user or group yourself. You don't need this permission level for your work.

Permission Levels are assigned to SharePoint Groups. When someone requests access to your site, you assign them to a specific user group. Depending on your assignment this person receives the right to change documents (Edit) or read only (Read).

It is also possible to give people permission directly to a document library, list or document. But this shouldn't be done!

### **How to Change the Properties of the Edit Permission Level**

SharePoint 2013 introduced the “**Edit**” permission as the default permission level for Members. What's the difference between Edit and Contribute?

In addition to the Contribute permission level, Edit also gives users the additional abilities to edit and delete existing, plus create new, lists. This gives your average user the ability to do a lot of damage to your SharePoint environment. I recommend you, when creating a new site, change the permission level of the “Members group” to Contribute, if possible or adjust the “edit” permission level by unticking at least “Manage Lists”. Here you see how to adjust the permission levels.

The permission level given to standard SharePoint groups can't be changed (e.g. Edit). But you can adjust what edit can do.

## Permission Levels » Edit Permission Level

### Name and Description

Type a name and description for your permission level. The name is shown on the permissions page. The name and description are shown on the add users page.

Name:

Description:

### Permissions

Edit which permissions are included in this permission level. Use the **Select All** check box to select or clear all permissions.

Select the permissions to include in this permission level.

**Select All**

#### List Permissions

- Manage Lists** - Create and delete lists, add or remove columns in a list, and add or remove public views of a list.
- Override List Behaviors** - Discard or check in a document which is checked out to another user and change or override settings which allow users to read/edit only their own items
- Add Items** - Add items to lists and add documents to document libraries.
- Edit Items** - Edit items in lists, edit documents in document libraries, and customize Web Part Pages in document libraries.
- Delete Items** - Delete items from a list and documents from a document library.
- View Items** - View items in lists and documents in document libraries.
- Approve Items** - Approve a minor version of a list item or document.
- Open Items** - View the source of documents with server-side file handlers.
- View Versions** - View past versions of a list item or document.
- Delete Versions** - Delete past versions of a list item or document.
- Create Alerts** - Create alerts.
- View Application Pages** - View forms, views, and application pages. Enumerate lists.

#### Site Permissions

- Manage Permissions** - Create and change permission levels on the Web site and assign

Figure 9: How to edit Permission Levels

## Give New Users Permissions Only at the Group Level

One of the practices I highly recommend is: Give new users permissions only at the group level. You can set individual permissions, to say

John Smith has access to this document library or just to a certain document. But I don't recommend this, because you will forget this "special permission and if you do this several times it gets uncontrolled.

I recommend instead to the following:

1. Go to "Site Permissions/Advanced Site Permissions" and create a new SharePoint group (Create Group) with a meaningful name, such as ACCOUNTING CLERKS and fill-out the additional fields. On the bottom of this form, choose the permission level group members get on this site. Give them just "Read" permission.
2. Then go back to the group overview and the add John Smith to the ACCOUNTING CLERKS Group

This creates a structure that is somewhat self-documenting and makes it easier to change permissions if John Smith leaves or is replaced, or has an assistant join him. The changes to permissions come about just by changing the group membership. In some environments this can be done with active directory groups, with a similar approach and thinking.

Permissions for individual users are:

- Hard to decipher (who has what level of access)
- Cumbersome to manage

*Worst practice: Give individual users permissions to specific SharePoint elements*

In our large program, it was useful to define e.g. additional groups for:

- Risk Management and Group Audit (Group: Risk and Audit) – They can *Read* all information on the site (also sensitive one).
- Project managers of the program including the project controller and the PMO (Group: Program Management) – They have *Contribute* access to all information also to sensitive information which normal Members don't have.
- Steering Committee Members have only *Read* access to the document library "Steering Committee".

I recommend you not to define too many Groups because it can be cumbersome to manage them.

## SharePoint Group Challenges

When you define a new group, the user who created the group receives group owner status by default. Always assign a group as group owner (e.g. the Site Owner Group). This is especially important for Site Managers, because they could be locked out. The Site Owner group should have at least two members.

Before creating new groups, reflect and assess:

- Do I really need special site permissions?
- Do I need all 3 new SharePoint groups?
- Is there an existing group that I can use?

## Item Level Permission

You can set permissions at the Item Level

Item = Folder, Document or List Item

Just because you can, doesn't mean you should, because of these challenges:

- A SharePoint view doesn't differentiate unique permissions
- Laborious administration:
  - Manual process of checking broken permissions
  - Updating permissions requires a change to each file
- May lead to performance issue
- You will forget after some weeks these special permissions

More Info: [SharePoint Permissions Simplified](#)

## Who Needs Access to Your Site?

If someone needs access to your site, first ask follow-up questions, especially in a large program where you don't know every team member:

- Why do you need access?
- Who is your project manager/subproject manager/stream leader/boss?
- What do you need to do with this information/documents?  
Read/Change?

Grant read or contribute rights only according to the principle “need to know” and “need to contribute”.

## The Site Managers Responsibility

As a SharePoint site manager or site owner you have full control on your site, that means a lot of responsibility. You play a pivotal role in SharePoint success (or failure). Consider these important points:

- Give Full Control only to your deputies, but train them well
- Don't take Site Manager delegation lightly!
- Learn from other experienced SharePoint site managers. What lessons learned can they share?

## Share Files and Sites in SharePoint Online

Since SharePoint 2013, Members with contributing or editing rights can Share documents of the site and also the site with other people in your organization or outside of your organization. This may be an intuitive and convenient way members can give other interested people access to information and embraces the social media way of work.

Be careful, this feature is hard to govern and could break permission inheritance of files and could grant permissions to individual users. That means it contradicts the Contribute/Edit or Read permissions level.

Sharing a site or asset within a site such as a library or document is essentially the same as granting permission to a particular person, user, or group to the shared asset.



Many companies will disable the ability for external users to access or even receive invitations to the content stored in their tenant. And you as a site owner should also think seriously about this point to protect your project information.

In SharePoint Online, you have the options under *Site Permissions > Advanced Permission Settings > Access Request Settings*: to untick “Allow Members to share the site and individual files or folder”.

There are two primary forms for sharing within SharePoint, internal sharing and external sharing. Internal sharing includes sharing with users or security groups within your organization. External sharing includes sharing with anyone else.

More Information about sharing information in SharePoint you get here:

[To Share or not to Share? A must-read for SharePoint Site owners](#)

[How broken are Office 365 SharePoint permissions?](#)



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# Streamline Your Project Work With SharePoint and Get More Productive!

SharePoint is one of the most widely used software in project management, e.g., as a document repository, risk management tool, for change request management, as a project data repository, communication and collaboration tool.

This book shows you how to make your project management more efficient with SharePoint Online. It's a summary of practical tips and tricks from my long-term experience with SharePoint in projects and programs gained in the recent years.

In this book, you will not learn SharePoint from scratch, but you will learn all the critical elements necessary to build your project site that can effectively coordinate communication and collaboration among team members.

## Inside . . .

- Collaborating successful with SharePoint in projects
- Organizing and managing project information
- Understanding the SharePoint Online modern experience and Microsoft 365 groups
- Using SharePoint groups and permissions effectively
- Integrating SharePoint with the other Office 365 apps
- Creating sites, subsites and hubsites
- Setting-up the architecture of your SharePoint Site
- Building your project home page
- Working with documents and lists and libraries
- Defining the best libraries and lists for your project

**Roland Wanner** has over 30 years of experience in projects and programs as a Project Manager, Senior PMO and Project Portfolio Manager and has been working with SharePoint for more than 10 years. He helps you to make your projects even more successful with SharePoint.

Go to [www.rolandwanner.com](http://www.rolandwanner.com)

for more information

Business & Economics/ Project Management

## The Essential Guide