

SharePoint

Online

for
Project Management



How to Make Your Project
Management More Efficient

2022 Edition

incl. eBook



ROLAND WANNER

SharePoint Online

For Project Management

How to Make Your Project
Management More Efficient



ROLAND WANNER

Contact to the Author:

Roland Wanner

E-Mail: info@rolandwanner.com

Internet: www.rolandwanner.com

Distribution:

Amazon Distribution

Disclaimer

This publication is designed to provide competent and reliable information regarding the subject matter covered. However, it is not intended as a substitute for legal or other professional services. Readers are urged to consult a variety of sources and professional expert assistance. While every effort has been made to make this book accurate, it may contain typographical and content errors.

The information expressed herein is the opinion of the author and is not intended to reflect upon any particular person or company. The author and publisher shall have no responsibility or liability with respect to any losses or damage caused, or alleged to be caused, by the information or application of the information contained in this book.

Subjects include: SharePoint Online, Project Management, Program Management, Team Collaboration, Project Sites, Team Sites, Intranet, PMI, PMBOK,

Copyright © 2021 by Roland Wanner

All rights reserved. No part of this book may be reproduced, extracted or transmitted by any means, electronic or mechanical, including but not limited to photocopying, recording or by any information storage and retrieval system, without prior written consent of the author.

Copyright © 2021 Roland Wanner

Version 1.06 January 2023



Table of Contents

	Preface.....	7
	What SharePoint Offers for Project Management.....	8
	Make Your Project Management More Efficient.....	8
	Who Should Read This Book?	10
I	A Project With SharePoint	13
	How SharePoint Evolved	17
	What is the Future of SharePoint?	18
	SharePoint Online and the Modern Experience.....	20
2	A Project Management Information System	25
	SharePoint as a Project Management Information System.....	26
	Information Management in SharePoint	29
	Streamline Project Reporting.....	30
	Getting Started With a PIMS Based on SharePoint	31
3	The Architecture of Your Project SharePoint Site	33
	Planning of Your SharePoint Site Matters	33
	How to Create a New Site.....	36
	Do I Need Only one Site, Subsites or a Hub Site?.....	44
	How Many Document Libraries and Lists Do I Need?.....	45
	Document Libraries for Subprojects or Streams	51
	Microsoft Teams and SharePoint	51
	What About Confluence and Jira in Projects?	56
4	How to Use Groups and Permission	59
	The Challenges with Groups and Permissions	59
	Permission Levels.....	62
	The New Microsoft 365 Groups	71
	Unique Permissions for Libraries and Lists	76

	How to See What Users or Groups Have Access to SharePoint ..79
	How Can I Export Group Members From SharePoint to Excel?..82
5	The Project Homepage.....83
	The Most Important Page.....83
	Navigation is Key84
	How to Organize Links in SharePoint.....84
	Homepage Example87
	The Alternative Project Homepage.....89
	The Homepage for Your Subprojects.....90
6	Designing Pages.....91
	The New Modern Page91
	Web Parts – the Building Blocks of Page Design92
	Apps – The Legacy of the Old SharePoint94
	How to Create Collapsible Sections on Pages95
	The Project Calendar.....96
7	Organizing and Managing Information101
	Stay Away from Folders in SharePoint101
	The Importance of Metadata.....104
	Creating Site Columns108
	How to Define Metadata in Choice Columns in Three Different Ways.....112
	How to Create Lookup Columns115
	What Every Site Owner Must Configure115
8	Working With Documents and Lists.....119
	Check-out and Check-in of Documents.....119
	Versioning – Let’s Go Back to the Past124
	Content Approval of Items in a List or Library.....127
	How to Use Alerts128
	Searching in SharePoint.....129
	Conditional Formatting of SharePoint List and Libraries.....131
	Filtering in Lists and Libraries.....138
	Working with Views142

Co-authoring Project Documents.....	147
Copy and Paste Data from Excel to a SharePoint List.....	150
How to Create and Display Unique ID fields in SharePoint.....	151
How to Personalize Your Project Site for Users.....	153
How to Display Recently Modified Documents	154
How to Find Project Information Faster	157
How to Use SharePoint in Agile Projects.....	161

9 Solving Common SharePoint Problems163

I Do Not See What I Should See.....	163
Where Is My Document That I Have Just Uploaded?.....	164
Office 365 Opens the Old Version of a Document from a SharePoint Library	164
Check-out/Check-in Is no Longer Possible.....	166
Missing “Open with Explorer” in SharePoint Online Modern Document library	167
How to Archive Outdated Documents	168
Naming Convention	171
Files That Need Attention.....	174
Bulk-Edit Item Properties in SharePoint Lists and Libraries	175
Use Microsoft Power BI to Create Charts and Visualize Your SharePoint List Data	176
SharePoint Training Should be Mandatory for Your Team	177

10 Libraries and Lists for Your Project181

Risk Log (List).....	182
Issue Log (List)	185
Change Control (Document Library)	186
Contracts/SOW (Document Library).....	187
Schedule Change Log (List).....	188
Project Contacts	188
PMO Action Log.....	189
Glossary	190
Announcements	190
Program Calendar	190

 Appendix.....	193
More Useful Information.....	193
Index.....	196

Preface

Project 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.

What SharePoint Offers for Project Management

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.

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 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 gained knowledge is not enough to set-up and use SharePoint really effectively, especially for projects and programs.

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 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/>

How to Get the eBook

If you are reading this book in paperback format, you will not be able to open the many hyperlinks the book contains to get additional information to certain topics. I know that's unfortunate. Get the eBook (PDF) for free with active hyperlinks.

To receive the eBook, please send your purchase receipt or a self-made photo showing you and the paperback book at the same time to:

info@rolandwanner.com

A Project With SharePoint



This 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 a team in Microsoft Teams 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 101.

How SharePoint Evolved

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.

SharePoint provides a number of features and functionality to help drive collaboration including:

- Document management and sharing
- Co-authoring Documents
- Intranet portals
- A newsfeed
- Wikis and forums
- Knowledge management.

SharePoint also offers numerous security settings such as encryption and permissions to help you control who can access and edit project data.

What is the Future of SharePoint?

In recent years, several software tools have emerged to compete with SharePoint. These productivity and project management (task management) tools are among others: Trello, Jira, Asana, Monday.com, Basecamp, Wrike, Clickup, Notion and many others.

What are the core differences between these systems and SharePoint? This short overview will give you the characteristics of these tools.

SharePoint is a collaboration & content management platform which can be used to build portals, collaboration sites, & also content management sites. Core elements are document libraries and lists with data as well as pages.

Asana, Trello, Jira and the other tools have their roots in task management and have then grown into comprehensive project management solutions for teams with many functionalities. You can organize everything—from company objectives to routine tasks—in one place so everyone is clear about priorities and responsibilities, and you can monitor progress in real time to keep projects on track. Many have the right mix of task management, visualization, and collaboration and communication.

In my view, these tools are great in a collaborative environment for smaller projects, fast to set-up and inexpensive and don't need a Microsoft Office environment. SharePoint is limited primarily to content management (project files and data with libraries and lists. It improved in the last years its ability to build easily project portals and nice websites. Integrated in the Office 365 environment with Planner, Teams, Power Apps etc. it has similar functions as the other collaboration systems, but it is not a single system itself and it is not easy to understand how all the components work together—and rather expensive.

More to this topic: [Project Management Tools Comparison](#)

[What Is The Best Project Management Software?](#)

(Get the free eBook of this book to open the hyperlinks or type the hyperlink text into the Google search field to find the additional resources).

What Role will Microsoft Loop Play in Project Collaboration?

Microsoft's core productivity software SharePoint increasingly faced pressure from the other productivity and task management tools like Trello, Jira, Asana, Notion, which aren't weighed down by proprietary file formats. Therefore, Microsoft unveiled in November 2021 Loop, an Office app for helping workers stay on top of projects to compete with the other productivity and task management tools. At the moment it's not so clear what role SharePoint will play in this new world. But I am sure, SharePoint will keep an important role in the Microsoft 365 environment and will be even further integrated with Teams and Loop. First Loop components have been implemented in Microsoft Teams in Spring 2022. When a full version of Loop will be available is still open.

SharePoint Online and the Modern Experience

Introducing SharePoint Online

During the last 12 years, I was able to follow the development of SharePoint and its use in various companies in projects. The basic principle of SharePoint has not changed much in the last 12 years, but the usability and design have been massively improved, and many useful functionalities have been added.

In May 2017, Microsoft made some major changes to SharePoint with the introduction of SharePoint online. Microsoft unveiled the future of SharePoint, and it looked and behaved unlike anything we had seen before. Adding web parts and content to pages was almost instantaneous. Rollups were configured without breaking a sweat—and the web design was responsive!

SharePoint introduced the Modern Experience

Modern sites and the new document library and list experience in SharePoint Online introduced with SharePoint Server 2019 is (according to Microsoft) faster, displays better in mobile browsers, and is easier to use.

The *classic experience* means the older design and functionality of e.g., of SharePoint 2016, is still usable also sometimes visible when using the modern design. The appearance of e.g., lists or configuration pages is until now not always consistent and show often still the classic design.

Almost every month, when a new Microsoft 365 update lands on my PC, I discover new functionalities or improvements in SharePoint Online—also with regard to usability and design functionalities.

Try it Out

The best way to start embracing modern SharePoint is to just get your hands dirty—spin up a modern site and go to town. Modern SharePoint is snappy and intuitive. Put the page into edit mode and you can start

adding web parts. From the get-go, you'll find that it's quicker to build a page than ever before.

Microsoft promises that SharePoint Online is faster. My experience is, it's only faster when you have a fast internet connection and easier to use if you never used the "old" SharePoint. As a longtime user of SharePoint 2010 it was not so easy for me to get used to the new look & feel—but after one month working with SharePoint Online, I wouldn't go back to an older SharePoint version. With the new modern experience, you can, e.g.:

- Create easily site pages with diverse content sources.
- Create new folders and upload folders the same way you do in OneDrive, using the command bar instead of the ribbon. You can also easily copy and move files using the command bar or simply by drag and drop.
- Pin documents to the top to highlight them.
- Add files as links instead of copying them between sites.
- Easily add, reorder, resize, sort, filter, and group columns, and create custom views.
- Quickly change file info, and easily access previews and additional details.
- Improve the display of lists with column formatting and list view formatting.
- Add rich location data from Bing Maps or your organization directory.

The new experience supports the themes, navigation, and custom buttons that were created in the classic experience. However, some features can only be used in the classic experience.

There are some features available only in the classic experience:

- The ribbon toolbars
- Some view features
- Task list with Gantt Charts
- A view column types
- Some types of customizations

Some features that cause the new experience to automatically switch to the classic experience, e.g., for SharePoint permission. Further reading:

[Top 5 Tips to succeed with Modern SharePoint \(Video\).](#)

How to Build a Cool Project Page Using Modern Page Experience in SharePoint.

With the modern experience you can easily and quickly create the homepage of your project SharePoint site as well as pages for your sub-projects or stakeholder communication. Pages like this are essential in your project and makes your project management more effective. The modern experience is much easier to use than the classic experience design. Try it out!

Further reading:

[What is Modern SharePoint and Why Should I care?](#)

[How to build a cool Intranet Landing Page using Modern Page experience in SharePoint](#)

The New Microsoft 365 Groups

Back in 2015, Microsoft has rolled out the new Office 365 functionality. They called it Office 365 Groups—beginning of 2020 they were renamed to “Microsoft 365 Groups”. The new functionality has provided a much-needed alternative to organizations looking to enhance collaboration. Let me explain. When we think about collaboration in SharePoint, most of us think of project or team sites. While those sites provide a great way for users to collaborate, save and structure content, they do require a level of overhead and management of site administration, creation, metadata oversight, security etc.

Microsoft 365 Groups is a *cross-application membership service*. Each Microsoft 365 Group lives in Azure Active Directory, has a list of members, and is attached to that group's related Microsoft 365 workloads, including a SharePoint team site, Exchange mailbox, Planner, Power BI, OneNote—and, optionally, a team in Microsoft Teams.

You will learn more about this topic in the chapter “How to Use Groups and Permissions” starting on Page 59.

A Project Management Information System

2

Project communication and information management does not always seem to have a high priority in project management, although we communicate multiple times a day. They are part of project collaboration, which is essential to create great project results.

Communication is not only indispensable in our daily lives, but also in projects the means or perhaps better the “fuel” or the “lubricating oil” that drives the project forward, integrates project team members and stakeholders and reduces risks. SharePoint and the other Microsoft365 tools are an indispensable tool here, but they do not replace personal communication.

SharePoint as a Project Management Information System

A project has a problem if project team members store information in different shared drives, do not share it, do not make information visible and quickly available. 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.

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 project managers and PMO's creating, 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 basic SharePoint knowledge.

The key objectives a PMIS on SharePoint can meet are:

- **Centralize Project Information:** Project contacts, calendars, task lists, risks, issues, change requests, resource lists, documents, SOW's, 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.

The System Landscape Has Changed Significantly

In the last few years, the Microsoft system landscape has changed significantly. In 2010, when I used SharePoint for the first time, there was only Word, Excel and PowerPoint and a not user-friendly Microsoft video conferencing solution called LiveMeeting. Today, with Microsoft 365, you have a system landscape for projects that is so comprehensive and powerful that you have to choose the right tools for your project and the maturity of the employees.

SharePoint is still very important, but e.g., Teams has in the meantime taken on a high value in terms of collaboration, and tools such as Planner or Whiteboard continue to increase in use. You can also distinguish the software tools used in projects as follows:

- File Management and Collaboration: SharePoint
- Communication and Collaboration: Teams
- Planning & Scheduling: Planner, MS Project
- Creativity: Whiteboard
- Software Development: Azure DevOps

The tools are becoming more and more interconnected and can even display content from the other tools. For example, you can display seamlessly SharePoint Libraries or Planner in Teams.

The Correct Place to Store Your Project Files

Saving files is an activity that you probably do several times a day. And in this activity, you have to decide: where do I save the files? is it OneDrive, SharePoint or even Teams? There is sometimes a bit of confusion about which tool is used best for which purpose. Especially in Projects you should have a clear strategy which should also be clearly communicated to the project team members.

Each Office 365 Tool has its specific field of use. The following File storage concept you'll find in most larger company which uses Microsoft365. And this concept is also the correct and practical way to store your files as a project team member.

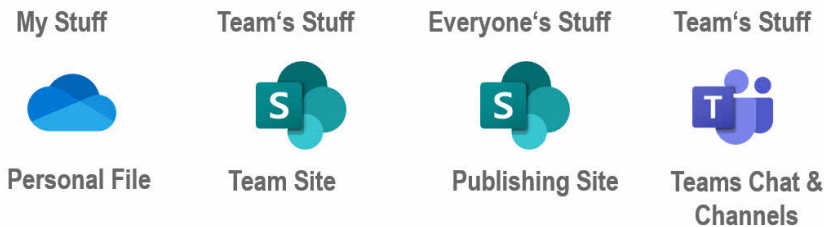


Figure 1: Where to store your project files

OneDrive for Business: Your private working space that remains private until you share things. OneDrive is in the cloud, and you can access it from anywhere you have access to the internet. You use OneDrive for your personal stuff (your private files), but you can use it also for initial drafts of project documents before you move them to the project'' team site. In many companies, OneDrive is replacing shared drives or even your computer's hard drive.

SharePoint Team Site: Your project team's working and collaboration space. All project files and data should be stored on your team site in document libraries and lists. On your team site, you can give permission to your team members and stakeholders according to their needs (read or edit).

SharePoint Publishing Site: Your communication site. This SharePoint Site is based on the SharePoint Communication Site template. This SharePoint site type is most often used for one-way communication,

e.g., in a large program, department or company to store information where users have only read permission (e.g., official policies, guidelines, news). It's primarily self-service information. Many companies use this kind of site as their internal intranet site.

Microsoft Teams: Your teams communication and collaboration tool. This is, next to email (Microsoft Outlook), your communication tool with chats, and channels with specific topics. In your project, Teams is normally connected to your projects SharePoint site. Files that you upload in chat conversation are stored in your OneDrive for Business folder "Microsoft Teams Chat Files" and are shared only with the people in that conversation. You can access them from the Files tab in the chat, the Files page in Teams, and your OneDrive mobile app.

You can read more about the SharePoint Team Site and Communication Site and their Template on page 36.

Information Management in SharePoint

In SharePoint, you work mostly 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 allow 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.

Check-out a document from a document library prevents 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.

Content Approval 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.

The Permission System allows to restrict access to certain information according to the "Need to Know" principle. User may have contribute rights, only read rights or have no access to certain information, like financial data or SOW's.

Streamline Project Reporting

Presenting information in SharePoint 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 task list can be presented as a GANNT view (like MS Project), or a datasheet, or in 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.

SharePoint Alerts provide a convenient way to receive 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. More to Alerts you can find on page 128

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 apps and 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
- Use Microsoft Power BI to create charts and visualize your SharePoint List data.

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 Project Management Information System (PMIS) based on SharePoint should be designed to fit your organization's processes, as well as the type of project or program you conduct.

If your project is the first to use SharePoint 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 team members, so that required actions can be taken, and efficient collaboration between the team members is supported.

The Architecture of Your Project SharePoint Site

A well-planned and executed information architecture is a prerequisite for an intelligent and high-performing project site. The most important first step in planning an effective information architecture is understanding your project management framework, your users and helping them find what they need fast to complete their tasks in a way that makes the most sense to them.

The information architecture also helps improve user adoption, satisfaction, and productivity while reducing search time, information overload, and minimize compliance and security risks.

Planning of Your SharePoint Site Matters

SharePoint is easy to use and anyone with some SharePoint experience can build a project site. With SharePoint Online, it's a lot easier and faster than before.

When creating a new SharePoint Online Site for your project you can choose between two site templates: a *Team Site* and a *Communication site*. I recommend using the team site template for a project. The team

site comes with one document library, and you are ready to start. More to team sites and communication sites you can find on page 36.

"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 information 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?

You don't have to, and you can't answer all these questions immediately because all projects, also large ones, start small. But the answers to these questions are part of your implementation strategy and have to be answered in the first weeks after your project starts. With large and long-term projects these requirements will probably also change with the time, especially when you project grows.

The First SharePoint Site for Projects 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. What experiences have they made? This is always very helpful. If possible, ask more than one admin to have a broader picture. I had to learn creating project sites in 2011 from scratch and did a lot of mistakes. Don't do the same and use this opportunity!

How to Create a New Site

A new Modern SharePoint Site can be created by any SharePoint User. To do this, go to the App Launcher in the top left corner of SharePoint (symbol with the 9 dots) and chose SharePoint. Here you see below the app launcher Symbol “Create Site”. After clicking on “Create Site” you get a choice between a Team Site and a Communication Site.

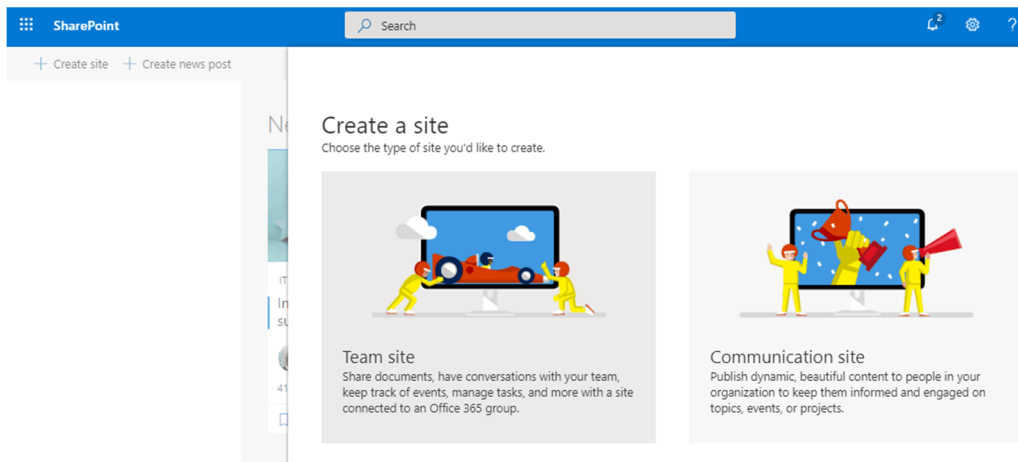


Figure 2: Choosing a SharePoint Site type

The Team Site

The team site template (modern team site) is designed for two-way collaboration and is not just a regular SharePoint Site, it's a site that is tied to a Microsoft 365 group. The site is therefore also connected to Microsoft Teams, Planner, Outlook online etc. This is the site template you normally use for a project.

Communication Site

You use the communication site primarily for one-way information sharing. Here you don't really expect much collaboration. This kind of site is just to share information with the team or the company. A good

Appendix

11

More Useful Information

The following sources may help you to further expand your SharePoint knowledge and to improve your site.

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/>

Recommended SharePoint Blogs und Internet Sources

<http://sharepointmaven.com/>

<http://www.learningsharepoint.com/>

<http://sharepointmaven.com/category/project-management/>

<https://www.brightwork.com/blog>

<https://en.share-gate.com/blog>

About The Author

Roland Wanner has been in the project business for over 30 years and has been involved in many projects - successful and failed. After his training as a mechanical engineer and industrial engineer, he first worked for 5 years as a project manager and then for several years as a project controller and project portfolio manager in mechanical and plant engineering. For more than 10 years he has been working as a project management specialist, project portfolio manager and project office manager in the banking and insurance.

Internet site: <https://www.rolandwanner.com>

Blog von Roland Wanner: <https://www.rolandwanner.com/blog>

Here you will find articles on the topics of project control, earned value management and risk management in projects.

Your Opinion Is Important to Me!

Thank you very much for buying this book. I have done my best with the content as well as the layout. I have put a lot of effort into making this book as complete and correct as possible. However, it cannot be entirely ruled out that I have made a mishap at one point or another in the book, whether in content or in spelling. Perhaps you also miss certain information or are of the opinion that certain topics should be dealt with in greater depth or disagree with us on certain subjects. I depend on your opinion!

I sincerely thank you for your ideas, thoughts and suggestions for corrections. Please send them to: info@rolandwanner.com

Did you like this book? Then I would be very happy about a **Review on Amazon.com** or your country-specific Amazon site. Share with potential readers, what you liked and why they should buy this book. Many thanks!

Write an Amazon Review

If you liked this book, I would be very pleased to receive a short review on <https://www.amazon.com/> or your country-specific Amazon page.

Two or three lines would be great. Reviews are not only a compliment you can give an author; they also help other readers make more informed decisions when buying a book. **Many thanks!**

More Books by Roland Wanner

I have been involved in project management for more than 30 years as a project manager, project portfolio manager and project controller and since a few years also in agile project management. In the last 20 years, I have therefore written several books on the following topics:

- Project Control
- Earned Value Management
- Project Risk Management
- Scrum and Agile Project Management

If you are interested in these topics and are looking for a professional, easy to understand book about them, you will find all my books on my website:

<https://www.rolandwanner.com/books>

Index

A

Active Directory (AD) 78
 AD groups, role-based 78
 administrator 44
 alerts 31
 alerts, how to use 128
 announcements 190
 app 43
 app bar 153
 apps **94**
 architecture 33, 45, 50
 archiving 168
 Asana 18
 audience targeting 85
 authorizing user access 78

B

benefits to stakeholders 31
 bulk-edit item properties 175

C

calculated columns 133
 calendar 96, 190
 CamelCase naming 46
 change control 186
 changes, not visible 121
 changing the name of List 173
 channels 51
 checked out to [Me] 122
 check-out, discard 121
 classic experience 20, 21, 41
 classic page, create 95
 co-authoring 120, **147**
 collaboration 13, 147
 collaboration software 14, 18
 communication site 36
 conditional formatting 131
 content approval 127
 content organizer rule 168
 contracts and SOW's 187
 contribute 64
 CSS 91

D

dashboard 31
 data sheet view 175
 design 63
 detail pane 155
 discard checkout 121
 document libraries for sub-projects 51
 document libraries, how many? 45
 document libraries, recommend 48
 document versioning 29
 documents, outdated 168

E

edit permission 64
 edit permission, remove 80
 edit permissions 77

F

files needing attention 165, 174
 filtering 138
 first SharePoint site 35
 folders 101
 folders, disadvantages 102
 folders, opposed to categories 102
 folders, when use 103
 format columns 131
 formating list views 132
 formulas 134
 full control 63

G

Gantt chart 135
 global navigation 41
 glossary 190
 group challenges 68
 group members, export 82
 groups 61
 groups and permission 59

H

HCWP 155

hero web part 86
 highlighted content web part 155
 home page example 87
 homepage **83**
 homepage, alternative 89
 homepage, sub-projects 90
 HTML 91
 hub site 37, 39, 44
 hyperlink column 86
 Hyperlinks **84**

I

independent projects 44
 information integrity 29
 information management 29
inherit permissions 76
 issue log 185
 item level permission 68

J

Jira 18

L

lessons learned 35
 libraries and Lists, recommended 46
 limited access 64
 link web part 86
 Links **84**
 Loop 19
 Loop components 52

M

managed metadata 113
 management dashboards 31
 Members 61
 metadata **104**
 metadata columns 108
 metadata navigation filter 139
 Microsoft 365 group calendar 98
 Microsoft 365 Groups 22, 71
 Microsoft Teams 51
 modern experience 20
 modern filter 140
 modern page 91
 MS Project 137
 multifunctional project teams 13
 my files icon 154
 my news icon 154
 my sites icon 154

N

naming conventions 171
 naming lists library apps 46
 navigation 84
 navigation elements 41
 navigation strategy 84
 new site, create 36
 news web part 153

O

open office files in desktop apps 116
 outdated, documents 168
 Owners 61, 78

P

page 42
 pages 93
 pages, designing 93
 permission 62
 permission inheritance 77
 permission level 62
 permission level, change 64
 permission levels 61
 permission, best practice 78
 permission, break 77
 permission, edit 64
 permission, item level 77
 permission, item Level 68
 permission, strategy 78
 permission, unique 76
Permission, unique 76
 permissions, apply 66
 personalize project site 153
 pilot project 31
 plan for implementation 34
 planning 33
 PMI 26
 PMIS 26, 31
 PMIS objectives 26
 PMO action log 189
 Power BI 176
 program 44
 project calendar 96
 project contacts 188
 project homepage 83
 Project Management Information System 26
 project reporting 30
 project sites 31
 protect data 47

Q

quick launch 41, 85
quick links 84

R

read 64
recent documents web part 153, 155
recently modified documents 154
risk log 182, 183

S

schedule change log 188
searching in SharePoint 129
security model 60
send to 168
sensitivity labels 113
share files 70
shared drives 16
sharing settings 116
sidebar 88
site access 69
site activity web part 154
site architecture 33
site collection 37
site collection vs. hub site 38
site column 108
site column, create 111
site column, use 109
site columns, advantage 108
site managers responsibility 69
site or subsites? 44
site owner, configure site 115
site planning 33, 34
site search 88

site templates 37
sites web part 153
subsite 44
sync files locally 116
sync MS Project 137

T

team site 36
Teams 51
templates 84
Term Store 113
text link 86
top navigation 41
training 177
Trello 18

U

unique ID fields 151
unique permissions 76

V

validate Strict Text Formats 135
version, restore 125
versioning 124
views, working with 142
Visitors 61

W

web part 42
web parts **92**
Wiki 54
workflow 168
workflows 30

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

for more information

Business & Economics/ Project Management

The Essential Guide