Project Management and Collaboration in SharePoint 2013

Joe Giegerich
Gig Werks

Éamonn McGuinness
BrightWork

black and white solutions for a grey world
Today’s Presentation

• About Gig Werks & BrightWork
• What’s New in SharePoint 2013 & Project Management
• BrightWork for SharePoint 2013 PPT & Demonstration
• Q&A

www.Gig-Werks.com
About Gig Werks

- Company began in 2002
- Gold Partner Since 2002
- Field managed since 2004
- Various other Microsoft Awards and Tech Forum Award Winner 2008
- Invited into the Partner Evidence Program for SharePoint 2007, 2010 & 2013
- Market Focus
  - From 100 seats to 150,000
  - Headquartered in NY, with clients across the United States & Canada

www.Gig-Werks.com
Why Gig Werks for SharePoint

• Advanced Training and Information from Microsoft
• Have focused on SharePoint since 2003
• Have already helped customers move to SharePoint 2013
• Expertise around the full capabilities of SharePoint and the Microsoft Stack.
• Partner and offer expertise on the top SharePoint ISV’s in the channel including:
  • Axceler, Collabware, Intelledox, Metalogix, Nintex, BrightWork, Colligo, IGC, CADtoWIN, HiSoftware, KnowledgeLake, BA Insight, FPWeb

www.Gig-Werks.com
**SharePoint Quick Start Offers**

- SharePoint Advisory Services
- SharePoint 3 Day Staging & Development Workshop
- SharePoint & Business Intelligence
- SharePoint & Branding
- SharePoint & BCS

**Upcoming SharePoint Webcasts & Events**

Webcast – Tuesday 09/24
SharePoint 2013 and ECM: Governance and Compliance

BrightWork

Project and portfolio management software for SharePoint

- Founded in 1995 by founder and CEO, Eamonn McGuinness,
  - Eamonn has been involved in various international process and project management standards
  - Serves as TickIT/ISO 9001 Lead Auditor and a Software CMM (Capability Maturity Model) Lead Assessor.
- Customers
  BrightWork serves small to medium-sized businesses and Fortune 500 companies across the globe. Notable clients includes:
  - Autodesk
  - Microsoft
  - Allianz Insurance
  - Allscripts Healthcare
  - Department of Homeland Security
  - Baltimore Public Schools
  - Children’s Hospital Boston
  - Energizer, Mintz Levin
  - U.S. Bank
  - University of Chicago.

www.Gig-Werks.com
Project Management and Collaboration in SharePoint 2013

Joe Giegerich
President, Managing Partner
Gig Werks

Éamonn McGuinness
BrightWork
Before Survey/Poll - Reflection

• Do you use SharePoint to manage projects today?
  
  1. No
  2. Yes – we use SharePoint for some projects
  3. Yes – we use SharePoint for most or all projects
  4. Yes – we use SharePoint and Microsoft® Project synchronized on many projects
Workshop Outline

• Why SharePoint for Project Management?

• Using SharePoint 2013 out of the box

• Using SharePoint Extended for Project Management

• Resources (Free templates and Project Management Guide)
Workshop Outline

• Why SharePoint for Project Management?
  • Using SharePoint 2013 out of the box
  • Using SharePoint Extended for Project Management
  • Resources (Free templates and Project Management Guide)
Here we go – More Free Advice!

“I intended to give you some advice but now I remember how much is left over from last year unused.”

George Harris (1844-1922), US Churchman and Educator, addressing students at the start of a new academic year.
How to manage projects – simple version!

1. Processes (e.g. Goals, Tasks, Issues, Risks, etc.)
2. Reports (e.g. Open Work, Overdue Issues, Resources, etc.)
3. Constantly connect the people on the project to the processes
4. Evolve and mature the way you manage projects
What is the Architecture of SharePoint?

1. Lists
2. Web Parts
3. Sites
4. Site Collections
5. Microsoft Project Integration
Four Key Questions (Yes or No)

1. Are all projects performing to expectations?
2. Have you real-time visibility into all projects?
3. Are all the individuals involved skilled and trained in Project Management?
4. Are there templates (i.e. guidance) on how to deliver projects collaboratively?
## Build Best Practices into SharePoint Templates

### Project and Portfolio Management Spectrum

<table>
<thead>
<tr>
<th>Management by Exception</th>
<th>Loosely Structured</th>
<th>Semi-Structured</th>
<th>Fully Structured</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manage Projects</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issue Manager</td>
<td>Project Lite</td>
<td>Project Standard</td>
<td>Project Structured</td>
</tr>
<tr>
<td>PM Basics Lite</td>
<td>PM Basics Standard</td>
<td></td>
<td>PM Basics Structured</td>
</tr>
<tr>
<td><strong>Manage Portfolios</strong></td>
<td></td>
<td></td>
<td>Program Management Office</td>
</tr>
<tr>
<td>Issue Office</td>
<td>Project Office [using Tracker]</td>
<td>Project Office</td>
<td>Agile Software Manager</td>
</tr>
<tr>
<td></td>
<td>Project Office Portfolio</td>
<td></td>
<td>IT Project Manager</td>
</tr>
<tr>
<td><strong>Manage Demand</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Request Tracker</td>
<td>Project Request Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Tracker</td>
<td>Project Forecast Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Manage Work</strong></td>
<td>Work Manager</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Start Quick and Get Experience

“For the things we have to learn, before we can do them, we learn by doing them.”
- Aristotle
A Recommended Approach from BrightWork

Start
Deliver Immediate Visibility and Control

Evolve
Mature Project Management Practices with Flexibility
Q&A (and feedback please)
Workshop Outline

• Why SharePoint for Project Management?

• **Using SharePoint 2013 out of the box**
  
  • Using SharePoint Extended for Project Management
  
  • Resources (Free templates and Project Management Guide)
(1) Processes (e.g. Deliverables)
(1) Processes (e.g. Deliverables)
(1) Processes (e.g. Issues)
(1) Processes (e.g. Tasks – in WBS View Mode)
(2) Reports (e.g. Timelines)
(2) Reports (e.g. Calendars)
(2) Reports (e.g. Notebooks)

Project Status Notes
Sunday, September 02, 2012  3:19 PM

Not sure how this project is going - getting kind of worried ...
(2) Reports (e.g. All My Work/Tasks in one place)

Source ... Microsoft Project Team Blog:
(3) Connect People to Projects (e.g. Newsfeeds)

Source ... Microsoft SharePoint Team Blog: 
http://sharepoint.microsoft.com/blog/Pages/BlogPost.aspx?pID=1014
(3) Connect People to the Project (e.g. email, Alert, Project sync, Outlook sync, Excel export)
(3) Connect People to the Project (e.g. Mobile access, including update and edit)
(3) Connect People to the Project (e.g. Workflows)
(3) Connect People to the Project (e.g. SkyDrive Pro)

Source ... Microsoft SharePoint Team Blog: http://sharepoint.microsoft.com/blog/Pages/BlogPost.aspx?pID=1014
(4) Evolve Project Management

Get started with your site

1. Share your site.
2. Working on a deadline?
3. Add lists, libraries, and other apps.
4. What's your style?
5. Your site. Your brand.
(4) Evolve Project Management
(4) Evolve Project Management
(4) Evolve Project Management
(4) Evolve Project Management

BrightWork Team Site ▶ Add Apps ▶

Microsoft SharePoint

Featured Apps

- The Election Watch - 2012
- Facebook Integration
- KODAK Capture Office Software

Price
- All
- Free

Categories
- All
- Communication
- Content Management
- Customer + Contact Management
- Education
- File Converters + Viewers

Most Relevant ▶ Highest Rating ▶ Most Downloaded ▶ Lowest Price

“Napa” Office 365 Development Tool
## Microsoft Project 2013 Sync

![Microsoft Project Screenshot]

### New Task or Edit

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Due Date</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent A</td>
<td>Wednesday</td>
<td>Eamonn McGuinness</td>
</tr>
<tr>
<td>Task 1</td>
<td>3 days ago</td>
<td>Eamonn McGuinness</td>
</tr>
<tr>
<td>Task 2</td>
<td>Today</td>
<td>Eamonn McGuinness</td>
</tr>
<tr>
<td>Task 3</td>
<td>Wednesday</td>
<td>Eamonn McGuinness</td>
</tr>
<tr>
<td>Parent B</td>
<td>January 29</td>
<td>Eamonn McGuinness</td>
</tr>
<tr>
<td>Task 4</td>
<td>January 21</td>
<td>Eamonn McGuinness</td>
</tr>
</tbody>
</table>
Not Designed to Work with Project 2010

No apps are installed to open this type of link (ms-project)

Look for an app in the Store

<table>
<thead>
<tr>
<th>Title</th>
<th>Assigned To</th>
<th>% Complete</th>
<th>Issue Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create draft budget</td>
<td>Jim Corbin</td>
<td>50 %</td>
<td>No</td>
</tr>
<tr>
<td>Create draft plan for fiscal summary</td>
<td>Anne Wallace</td>
<td>0 %</td>
<td>No</td>
</tr>
<tr>
<td>Create report outline</td>
<td>Anne Wallace</td>
<td>0 %</td>
<td>No</td>
</tr>
<tr>
<td>Get Budget Signoff</td>
<td>Christine Chang</td>
<td>0 %</td>
<td>No</td>
</tr>
<tr>
<td>Create final version of upgrade plan</td>
<td>Alex Hankin</td>
<td>0 %</td>
<td>Yes</td>
</tr>
</tbody>
</table>

8/11/2012 8/12/2012
Project 2013 Sync Update - 1

• As before requires Project Professional 2013
• Now deals with stuff it used to reject, e.g.
  – a space at the start of a Task Name
  – unsupported characters in the Task Name
    • characters like !=-(*&^%$£” etc.
    • all supported without issue
• Very happy to say it now manages
  – Lead and Lag
  – Relationships other than FS
    • SS, SF, FF
## Project 2013 Sync Update - 2

<table>
<thead>
<tr>
<th>Task Name</th>
<th>% Complete</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Predecessors</th>
<th>Resource Names</th>
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<tbody>
<tr>
<td>Project Summary</td>
<td>4%</td>
<td>19 days</td>
<td>Thu 25/04/13 to Tue 21/05/13</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary Task 1</td>
<td>4%</td>
<td>19 days</td>
<td>Thu 25/04/13 to Tue 21/05/13</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 1</td>
<td>0%</td>
<td>2 days</td>
<td>Mon 29/04/13 to Tue 30/04/13</td>
<td>Fintan Manning</td>
<td></td>
<td></td>
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<tr>
<td>Task 2</td>
<td>0%</td>
<td>3 days</td>
<td>Wed 01/05/13 to Fri 03/05/13</td>
<td>Fintan Manning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 3</td>
<td>0%</td>
<td>2 days</td>
<td>Mon 06/05/13 to Tue 07/05/13</td>
<td>Fintan Manning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 4</td>
<td>0%</td>
<td>8 days</td>
<td>Fri 10/05/13 to Fri 18/05/13</td>
<td>Fintan Manning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 5</td>
<td>0%</td>
<td>2 days</td>
<td>Mon 20/05/13 to Wed 22/05/13</td>
<td>Fintan Manning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 6</td>
<td>0%</td>
<td>1 day</td>
<td>Tue 21/05/13 to Wed 22/05/13</td>
<td>Mary Keenan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 7</td>
<td>15%</td>
<td>1.05 days</td>
<td>Fri 17/05/13 to Tue 21/05/13</td>
<td>BFF Fintan Manning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 8</td>
<td>27%</td>
<td>1.08 days</td>
<td>Mon 23/04/13 to Tue 30/04/13</td>
<td>SSS Mary Keenan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 9</td>
<td>0%</td>
<td>2 days</td>
<td>Mon 29/04/13 to Mon 05/05/13</td>
<td>105F</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### New Task or Edit This List

<table>
<thead>
<tr>
<th>Outline Number</th>
<th>Task Name</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Assigned To</th>
<th>% Complete</th>
<th>Issue Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Project Summary</td>
<td>April 25</td>
<td>May 21</td>
<td>Fintan Manning</td>
<td>4%</td>
<td>No</td>
</tr>
<tr>
<td>1.1</td>
<td>Summary Task 1</td>
<td>April 25</td>
<td>May 21</td>
<td>Fintan Manning</td>
<td>4%</td>
<td>No</td>
</tr>
<tr>
<td>1.2</td>
<td>Task 1</td>
<td>April 29</td>
<td>April 30</td>
<td>Fintan Manning</td>
<td>0%</td>
<td>No</td>
</tr>
<tr>
<td>1.3</td>
<td>Task 2</td>
<td>May 01</td>
<td>May 03</td>
<td>Fintan Manning</td>
<td>0%</td>
<td>No</td>
</tr>
<tr>
<td>1.4</td>
<td>Task 3</td>
<td>Monday</td>
<td>Tuesday</td>
<td>Fintan Manning</td>
<td>0%</td>
<td>No</td>
</tr>
<tr>
<td>1.5</td>
<td>Task 4</td>
<td>Wednesday</td>
<td>Today</td>
<td>Fintan Manning</td>
<td>0%</td>
<td>No</td>
</tr>
<tr>
<td>1.6</td>
<td>Task 5</td>
<td>May 20</td>
<td>May 21</td>
<td>Fintan Manning</td>
<td>0%</td>
<td>No</td>
</tr>
<tr>
<td>1.7</td>
<td>Task 6</td>
<td>May 21</td>
<td>May 21</td>
<td>Mary Keenan</td>
<td>0%</td>
<td>No</td>
</tr>
<tr>
<td>1.8</td>
<td>Task 7</td>
<td>May 21</td>
<td>May 21</td>
<td>Fintan Manning</td>
<td>15%</td>
<td>No</td>
</tr>
<tr>
<td>1.9</td>
<td>Task 8</td>
<td>April 29</td>
<td>April 30</td>
<td>Fintan Manning</td>
<td>27%</td>
<td>No</td>
</tr>
<tr>
<td>1.10</td>
<td>Task 9</td>
<td>April 25</td>
<td>April 29</td>
<td>Mary Keenan</td>
<td>0%</td>
<td>No</td>
</tr>
</tbody>
</table>
Q&A (and feedback please)
Workshop Outline

• Why SharePoint for Project Management?

• Using SharePoint 2013 out of the box

• Using SharePoint Extended for Project Management

• Resources (Free Templates and Project Management Guide)
# What is Going Away with SharePoint 2013

<table>
<thead>
<tr>
<th>Description of change</th>
<th>Reason for change</th>
<th>Workaround (if applicable)</th>
<th>Applies to</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Chart Web Part is no longer available.</td>
<td>Similar features can be used with other applications, such as Excel Services.</td>
<td>If you used the Chart Web Part in SharePoint Server 2010, you can continue to use it in SharePoint Server 2013. If you did not use the Chart Web Part in SharePoint Server 2010, you can use other SharePoint functionality such as Excel Services to display a chart in a SharePoint site.</td>
<td>SharePoint Server 2013, SharePoint Online 2013</td>
</tr>
<tr>
<td>SharePoint Status Indicators and Status Lists are no longer available.</td>
<td>Similar features can be used with other applications, such as Excel Services.</td>
<td>If you used SharePoint Status Indicators in SharePoint Server 2010, you can continue to use them in SharePoint Server 2013. If you did not use SharePoint Status Indicators and Status Lists in SharePoint Server 2010 you can use other SharePoint functionality such as Excel Services to create key performance indicators (KPIs).</td>
<td>SharePoint Server 2013, SharePoint Online 2013</td>
</tr>
</tbody>
</table>

Boundaries or Opportunities to Extend

- Some of the project management capabilities not designed to be included in out of the box SharePoint 2013
  1. KPI’s and Charts (unless you build your own with Excel Services)
  2. Project Reporting in one site across many lists, e.g., My Work, Project Status
  3. Portfolio Reporting, e.g., Projects Status, Late Issues, Risks Occurred
  4. Metrics and trend history and charting – single projects and portfolios
  5. Templates, e.g., Project Office, Scrum, Agile, IT, Lite, Standard, Structured
  6. Best practice / template replication

SharePoint is an awesome platform – and it is designed to be extended!
This site is a Top Level SharePoint Site Collection

Projects Area is the main location for all Projects of the organization

Simply Tracking Projects in an "Excel" like fashion

Projects Tracker Template

Work and Project Management Site Collection

Contoso Projects

Templates

Projects Tracker
This site is a Top Level SharePoint Site Collection

Projects Area is the main location for all Projects of the organization

Rollup Areas provide structure and comprehensive reporting on all Projects

Actual Projects are managed at this level

Marketing Project Office

Marketing Project

Marketing Production

Marketing

Project Office Deployment – Iteration 2

Work and Project Management Site Collection

Contoso Projects

Templates

Templates for Iteration 1 Project Types

Marketing Project Template

Project Office Template

Projects Tracker

Marketing

Projects Tracker

Marketing

Projects Tracker

Marketing

Marketing

Marketing

Marketing

Marketing
Project Office Deployment – Iteration 3

Work and Project Management Site Collection

- Requests
  - Project Requests
  - Operations
    - Work Office
  - IT
    - Project Office
  - Marketing
    - Project Office
- Projects
- Templates
  - Project Request Manager
  - Work Manager Template
  - IT Project Manager Template
  - Project Office Template
  - Business Project Manager Template
  - Work Tracker Template

Support Requests
- Operations
  - Operations Work
- IT
  - IT Project
- Marketing
  - Marketing Project
Try this for yourself

Includes a one-month subscription to SharePoint 2013 Lab.
Extending SharePoint

1. Introduction
2. Start Quick
3. Improve Project Management Success
4. Easily Manage Projects
5. Collaborate on Projects
6. Effectively Manage Portfolios
7. Evolve Project Management
8. Training
9. Next Steps
Q&A (and feedback please)
Workshop Outline

• Why SharePoint for Project Management?

• Using SharePoint 2013 out of the box

• Using SharePoint Extended for Project Management

• Resources (Free Templates, Project Management Guide)
After Survey/Poll - Reflection

• Would you now consider using SharePoint to manage projects?
  1. No
  2. Yes – we will use SharePoint for some projects
  3. Yes – we will use SharePoint for most or all projects
  4. Yes – we will use SharePoint and Microsoft® Project synchronized on many projects
Welcome to your Project Site!

Add a new image, change this welcome text or add new lists to this page by clicking the links in the Quick Launch to the left to add files or add other project items such as documents and contacts.

Free SharePoint Project Management Template from BrightWork

<table>
<thead>
<tr>
<th>Overall Health</th>
<th>Time</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>!</td>
<td>✔</td>
</tr>
</tbody>
</table>

My Project Tasks
Collaborative Project Management Guide

• Including Project Management Leadership Style
Collaborative Project Management Guide: Plan and Setup the Project

2 Plan and Setup the Project

At this stage your project is approved and you have decided how to manage the project, or at least you have an outline approach. Hopefully you have a collaborative site set up. Now it is time to earn your stripes and plan and set up your project. For the purpose of this short guide we break this second stage into the following steps:

1. Plan the Project
2. Desk Check the Project Plan
3. Notify the Team of their Responsibilities

"In all things, success depends upon previous preparation, and without such preparation there is sure to be failure."
Caution (c.550 – c.471 B.C) Chinese Philosopher

2.1 Plan the Project

The thinking in this guide is that at a minimum you will need a Project Definition/Statement and a Task List (of some sort) on most projects. What additional artifacts you will use should have been decided in the Initiation Stage of the project (unless you skipped that stage!).
Project Management on SharePoint Case Studies

BrightWork

Case Studies

Leading companies and government organizations around the world rely on BrightWork solutions to help them better manage their work, projects, and processes on SharePoint.

Featured Videos

At AmSurg, we were looking beyond project management to a tool and resource that would enable collaboration, project management and performance management. With BrightWork, we found the solution which will enable us to initiate, plan and execute enterprise projects through our project pipeline.

Eric Thomhill, Vice President and Chief Information Officer, AmSurg

View Case Study
Q&A and Feedback

In Live Meeting, click “Q&A” panel or “Alt Q” to open the Question Manager

1. Questions
2. Feedback on this webcast
3. Suggestions for future webcasts

We’d love to hear more detailed feedback on this session email ... info@gig-werks.com

To get more related materials please visit: www.gig-werks.com

Connect with Gig Werks: