



Checklist 1

Project Site Start-up

**The Ultimate Guide To
Setting Up
Teams & SharePoint For
Project Management**

Lynzie Cotton

Checklist #1

Project Site Start-up

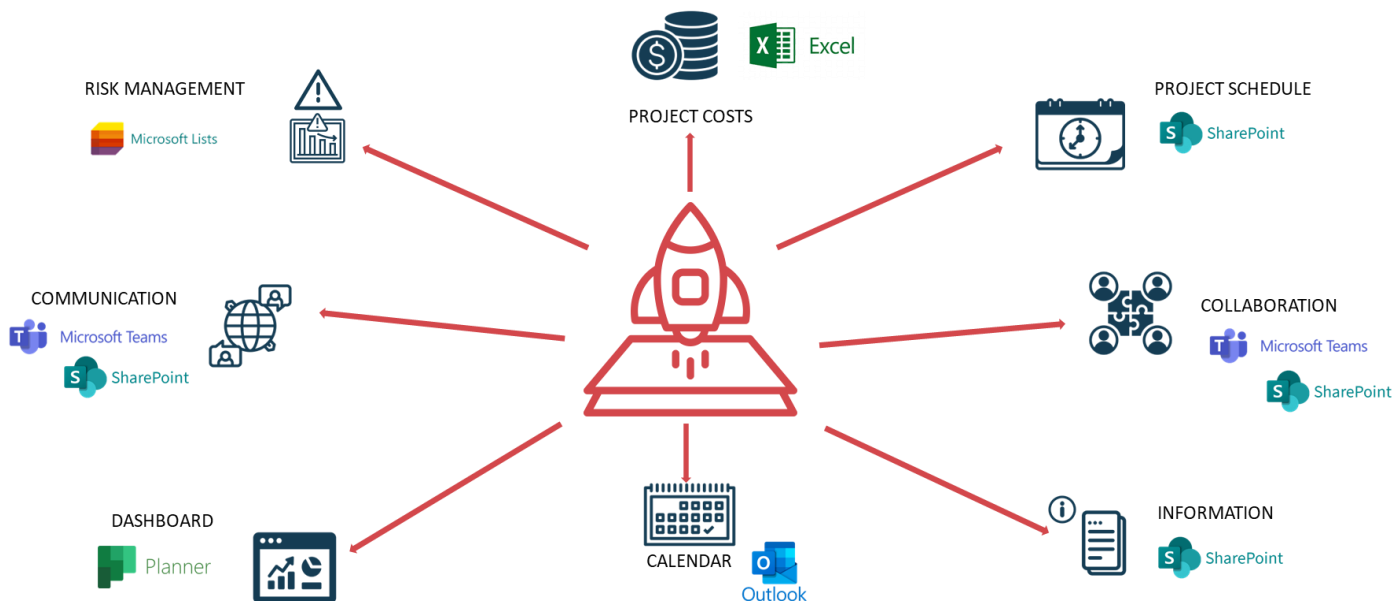
Your SharePoint Project Site is a space where you and your colleagues can work together on whatever it is you aim to deliver. You can even add MS Teams as a space to meet and get the work done.

You can create a Project Site from a template or from scratch – either way, you will need to start with a TEAM SITE.

This CHECKLIST will help you get started with all the basics you need to run a project.

Make sure ALL team members are familiarised with and are confident using your new SharePoint project environment.

Keep all documents. Meetings and work in progress within your site!



Checklist #1

Project Site Start-up



COLLABORATION

- Create a Team Site
- Add any business/team/client branding
- Add members



COMMUNICATION

- Add MS Teams
- Ensure guest access enabled & invite any external guests



PROJECT SCHEDULE

Add timetabling information including any:

- Deadlines
- Milestones/Key events



INFORMATION

- Ensure any pre-existing documents are uploaded
- Consider meta-data requirements eg. Sensitivity tags
- Consider using TABS in MS teams to work on documents



CALENDAR

- Surface/link to GROUP CALENDAR
- Ensure team members can view this in their personal calendars



RISK MANAGEMENT

- Create Risk Tracker using MS Lists
- Consider RAID Log or other RM tool
- Ensure pre-existing Risk Management documentation added



DASHBOARD

- Create a tasks/Kanban style board using MS Planner
- If not originated in SharePoint ensure this is added as a web part



PROJECT COSTS

- Ensure that you have created a space to accommodate your FINANCIALS if applicable
- Add Excel or appropriate trackers as necessary





Thank you

www.collab365.com

collab365.