Workbook

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

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collab365.

Contents

Introduction

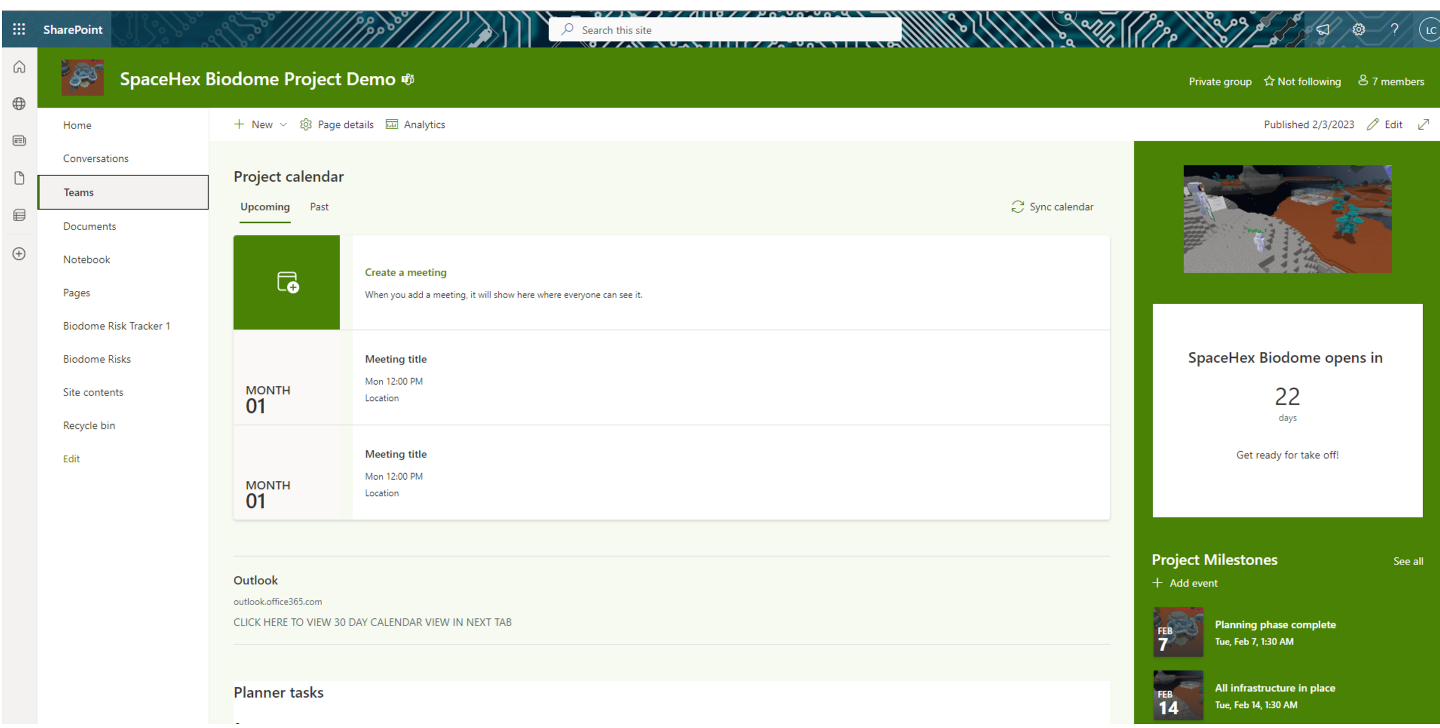
Thank you for attending this workshop on how to use Microsoft SharePoint and Microsoft Teams for project management. I hope you enjoyed the workshop as much I enjoyed preparing and presenting it.

This companion workbook will take you through each of the steps to setting up your first project from building your ‘hub’ in SharePoint to collaborating with your colleagues in Teams.

The idea is that you won’t need to step outside of the project environment you create or bring on board third party services to complete your work.

I understand that your needs will vary depending on your field and your experience with both projects and Microsoft 365 –I please share your ideas and any questions in the Collab365 Academy space!

Please follow the steps in order to get the most from this guide.



1. Build your PROJECT SITE with SharePoint

There are two main types of SharePoint sites you can create in SharePoint. These are Team sites and Communication sites.

- Team sites are spaces where you can collaborate with other team members. Team members all share the same permissions and editing capabilities which is why they are idea for working on projects

- Communication sites are most often used to present ‘read only’ information edited by a site owner – for this reason they are often used as intranet sites

In order to build your project site, you will need to create a TEAM SITE.

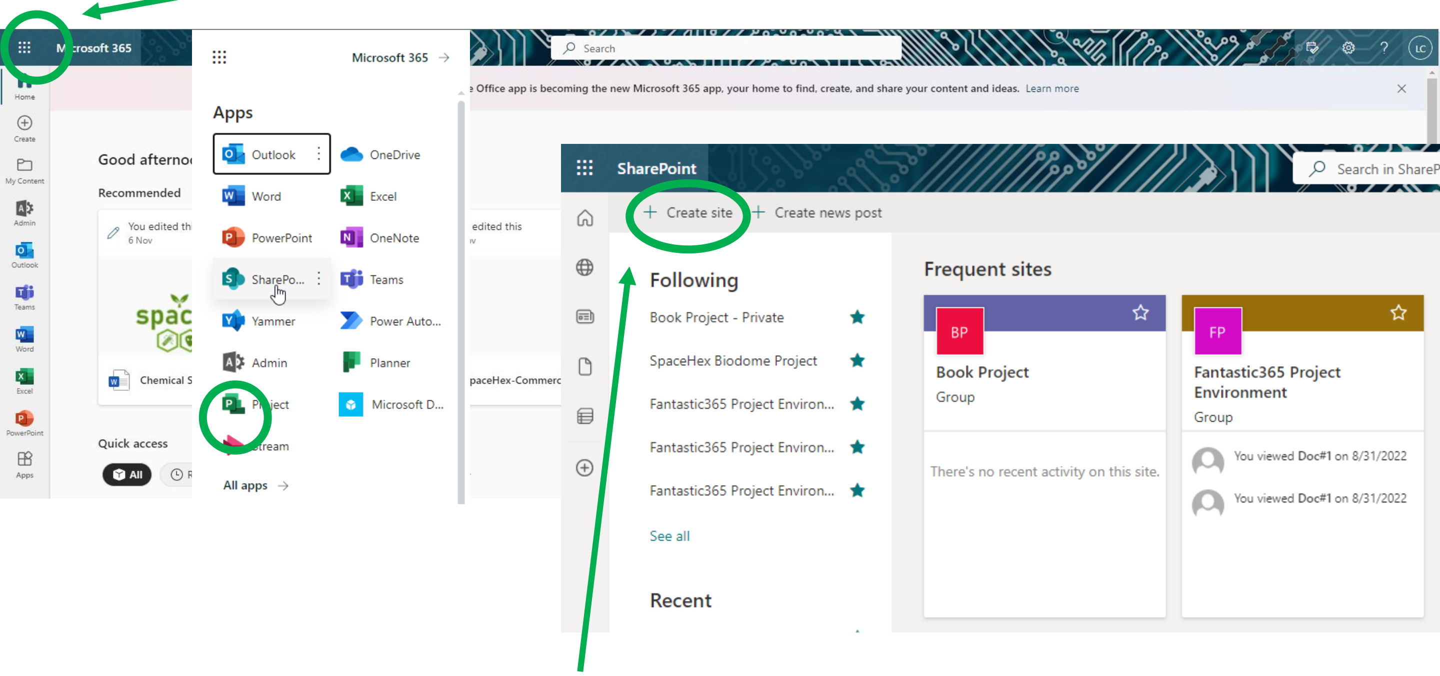
By creating a TEAM SITE, you will be enabling all of your team members to create & edit content AND you will be able to collaborate on your project within a corresponding Teams environment.

IMPORTANT: Just because this is a TEAM SITE it isn’t automatically a ‘Teams Site’! Adding MS Teams to your site is an option we will be including so be sure to look out for that crucial step as we go along…

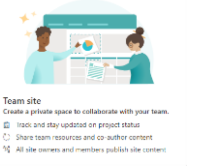
You may also notice that you can use TEMPLATES to create both Team and Communication Sites (there is in fact a template for project management), however, in order to maximise your learning and confidence, you will be building your site from scratch!

Setting up your SharePoint Team Site

From the M365 home page click on the waffle to locate SharePoint:



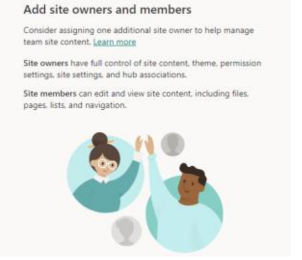
From the SharePoint homepage click + Create site and follow these steps:



1. Choose Team site from the 2 options provided
2. Give your site a name and provide a description so your people know what to do there
3. Check you are happy with the group email address and site address – edit if necessary
4. Choose your privacy settings – choosing PRIVATE means that only people you add or invite can join – this is best for a project space
5. Select your language of preference
6. CLICK NEXT

You will now be able to add site owners and members if you are ready.

If you aren't ready to add others to your space – simply click FINISH



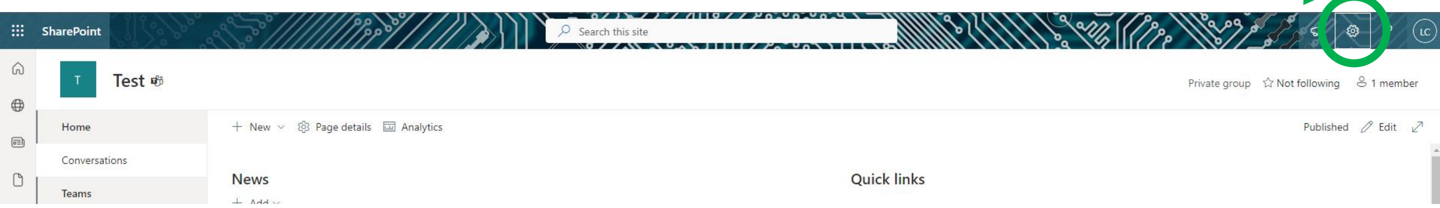
CONGRATULATIONS! YOU HAVE SUCCESSFULLY CREATED YOUR FIRST TEAM SITE
THIS WILL FORM THE BASIS OF YOUR PROJECT SITE

2. Setting the scene

Most businesses have their own branding and conventions around how they like their image and aims to be presented. Carrying these themes over into your work helps to forge team identity and cohesion. I believe that the way things look visually is very central to encouraging ownership and a shared ethos.

The first few tasks we are going to undertake are all about making our project environment recognisable and easy to navigate.

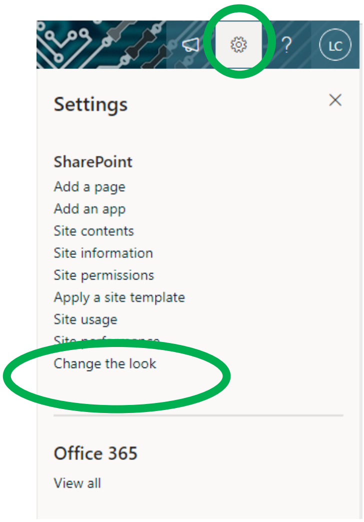
In order to edit the overall look/feel of your project hub, you need to use the COG in the top right of your screen:

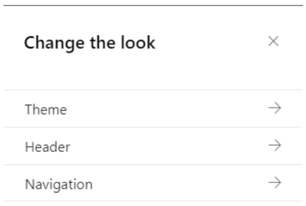


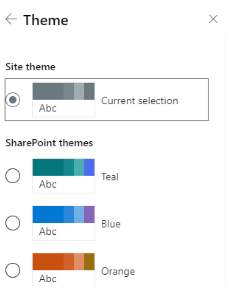
Selecting CHANGE THE LOOK will allow you to choose colours for your theme, choose a layout for your header and add a company logo or image and decide on a horizontal or vertical position for your navigation.

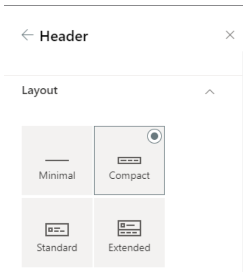
You can experiment at any stage with the aesthetics of your site – be creative and don't forget to SAVE!

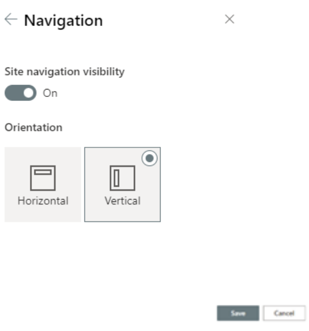
IMPORTANT – If you haven't already added Teams to your site I would recommend you do this before switching your navigation to horizontal as you won't be able to see the option any more!





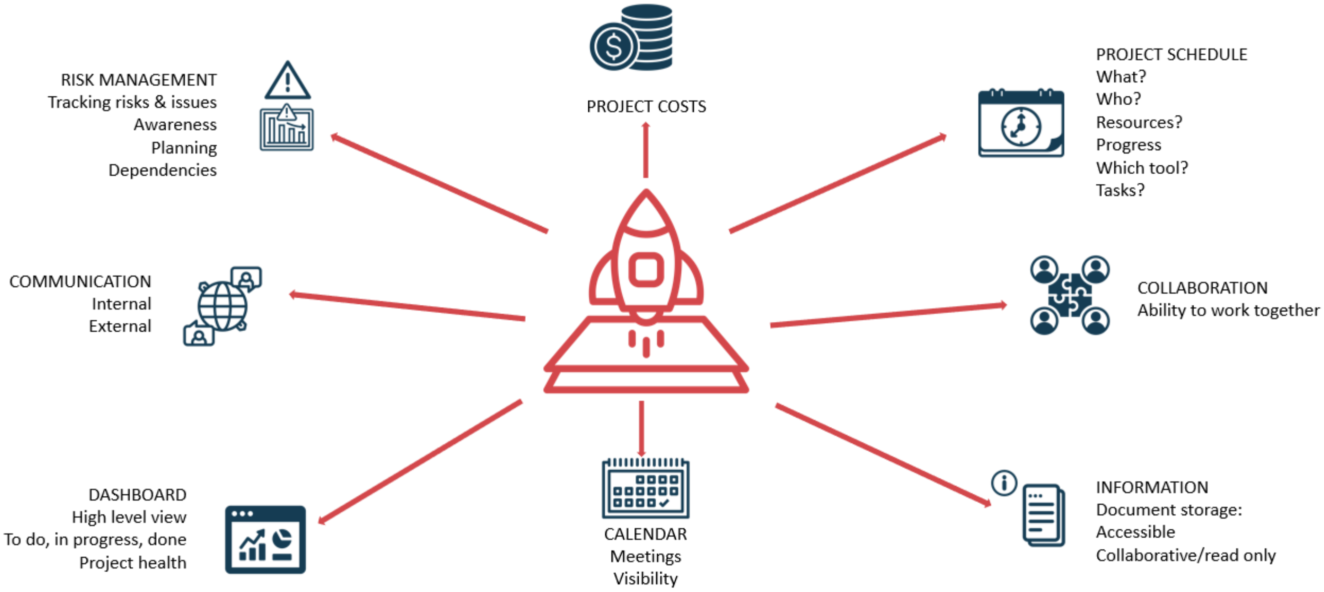






3. Assembling the elements of your project management environment

As described in the workshop, there are several aspects of running a successful project which need to be accommodated in our environment. We will consider each of these elements as we progress through this workbook:

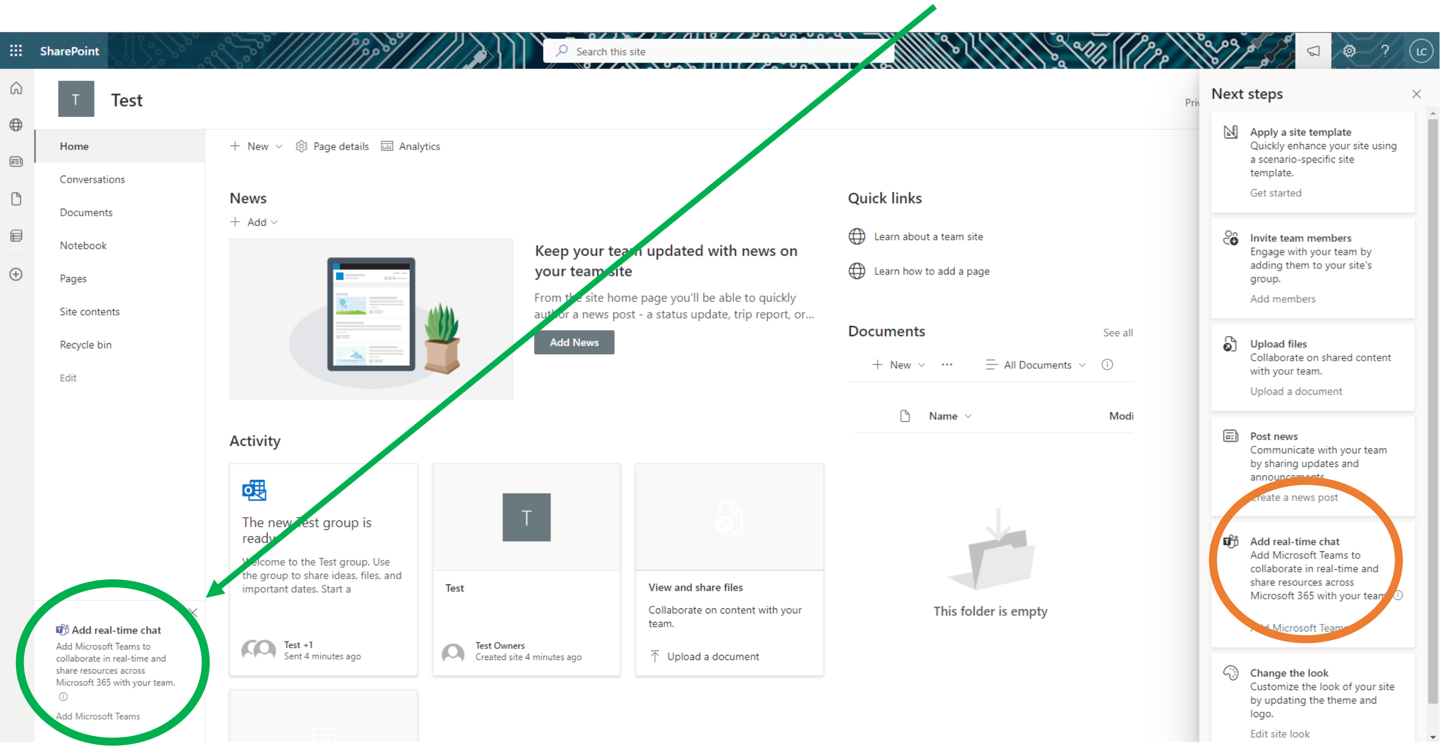


4. Collaboration

When it comes to working together MS SharePoint and Teams are a match made in Heaven!

Now that you have created the Team Site for your project, you need to make sure that you have Microsoft Teams connected. This is very easy to do but could be overlooked. If you prefer, you can build your site first then add Teams last.

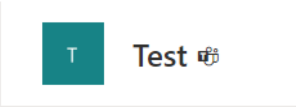
Click on Add Microsoft Teams in the bottom left corner of your screen:



You may notice the NEXT STEPS quick reference guide on the right – amongst other helpful resources, you can add MS teams to your site from here if it is visible too.

As you follow the steps you will be invited to add resources as tabs – this means that everything you add to your site will be visible and usable in Teams – when you edit a plan or document in Teams it will automatically update in SharePoint and vice versa!

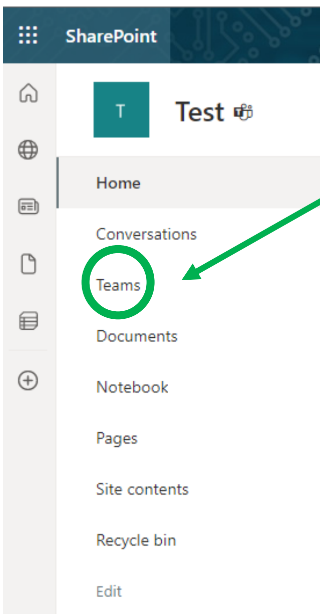
Once you have added Microsoft Teams you will notice that the Teams icon appears next to your team name:



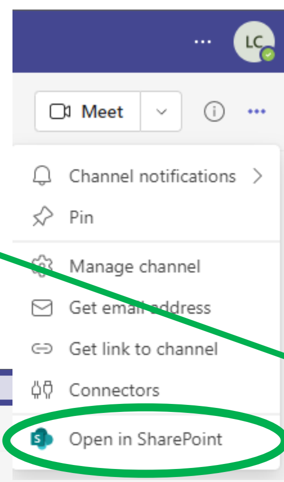
5. Communication

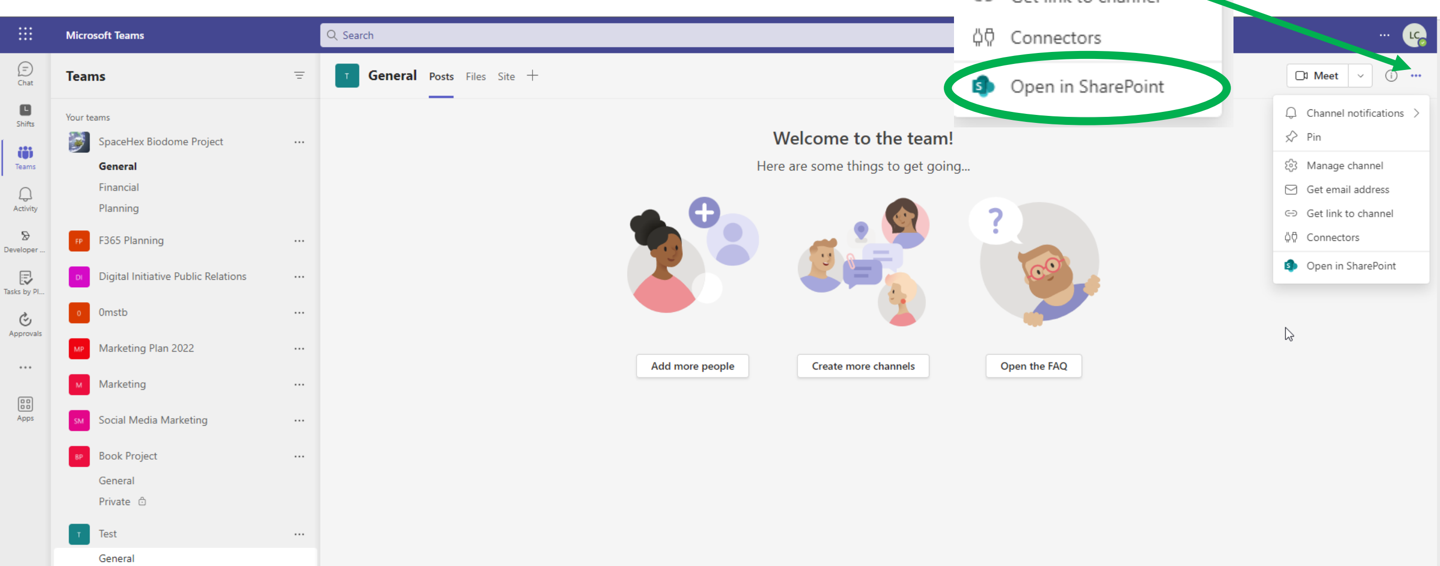
Now that you have MS Teams connected to your site, you have the means to contain ALL of your project communications in one integrated environment.

You can now work directly in your SharePoint site or via Teams. To go to Teams from your site simply locate Teams in the navigation bar on the left and click. This will open Teams in your Desktop app or in a new tab if you choose to use the Web App.



From Teams, you can navigate back to your SharePoint site by clicking on the ELIPSIS under your profile picture and selecting Open In SharePoint:

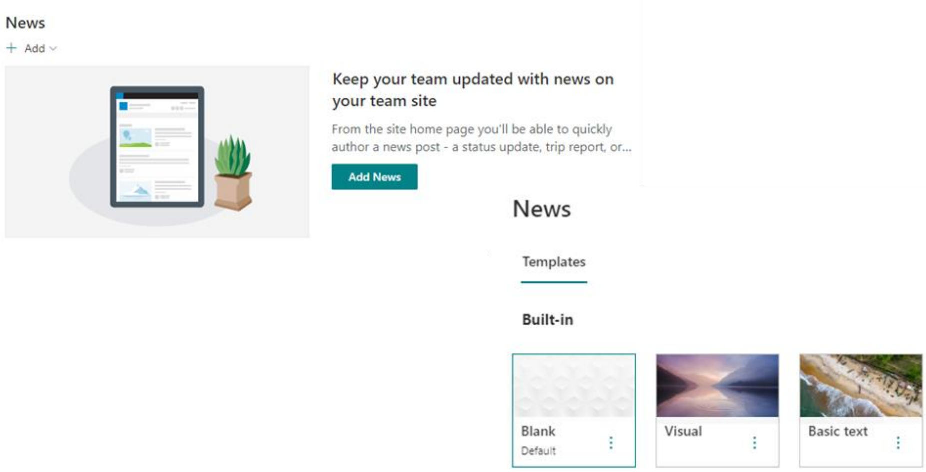




Communication

Sharing News

Add news items to your SharePoint site simply by clicking to +ADD and item and use the templates!



Guest Access

WORKING WITH GUEST ACCESS:

- You can provide safe and secure guest access to teams, documents in channels, resources, chats, and applications to people outside your organization
- Guest access in Teams is an organization-wide setting and is turned on by default
- A guest is somebody who doesn't have an account in your tenant
- When you invite a guest to Teams, a guest account is created for them in Azure Active Directory and they are covered by the same compliance and auditing protection as other Microsoft 365 users
- A team owner or a Microsoft 365 admin can add a guest to a team
- They get sent an email invitation which on acceptance allows them access to a team.

6. Project Schedule

A PROJECT SCHEDULE is a break down of what the project aims to achieve, the tasks that need to be done to achieve it, the resources required and the deadline we aim to meet.

Your SharePoint Team Site will form the backbone of your PROJECT SCHEDULE and include all of the relevant elements. Here you will be able to see at a glance the WHO, WHAT, WHERE and WHEN of your entire project. All of the hard work and communication will take place behind the scenes in your Teams.

The primary function of a project schedule is to act as a TIMETABLE.

With this in mind, we are going to add a countdown timer, a breakdown of key events and a contact list to our site.

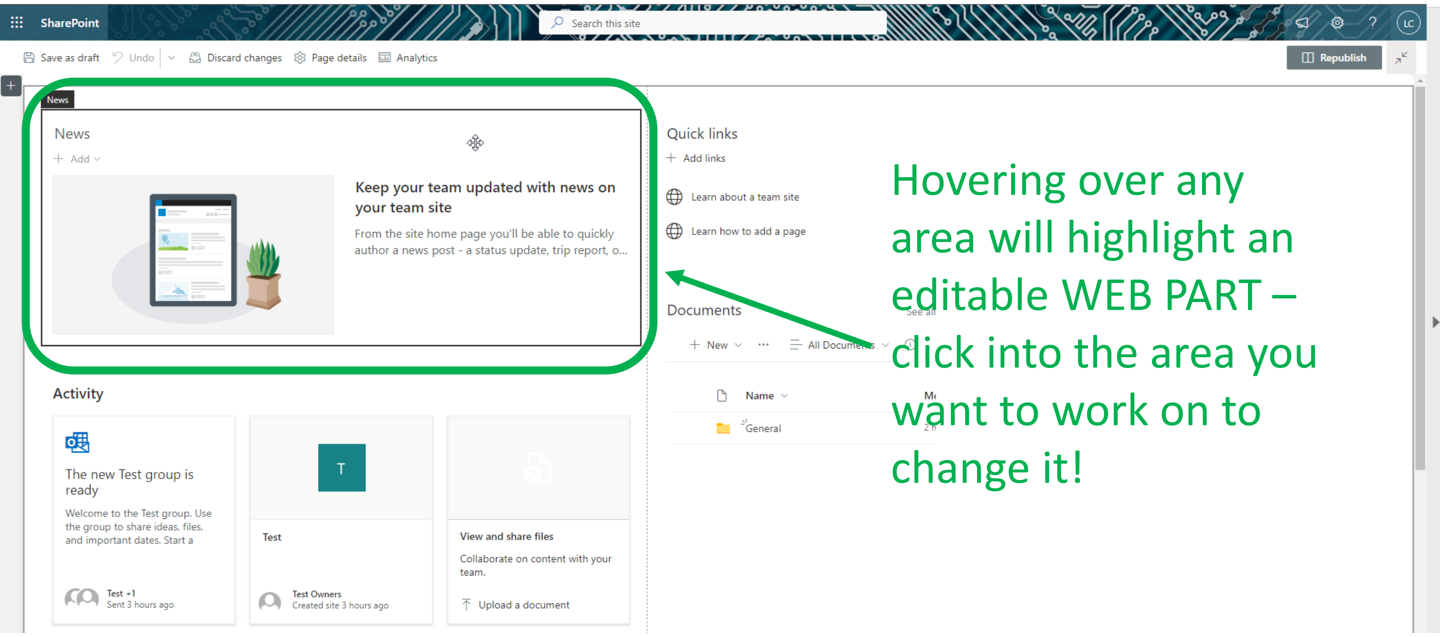
Remember that you (or any other member) can edit and update your site at any time – it is good practice to make this a regular activity.

Adding elements to your site involves using and editing WEB PARTS. Once you've tried a couple, there's no limit to the things you can try so let's start by adding:

- **A countdown timer** to remind team members of the deadline and encourage momentum
- **Key events/milestones** to keep everyone on track
- **A contacts lists** so that everyone knows team roles and details

In order to start editing and adding WEB PARTS click EDIT in the top right corner of your site:

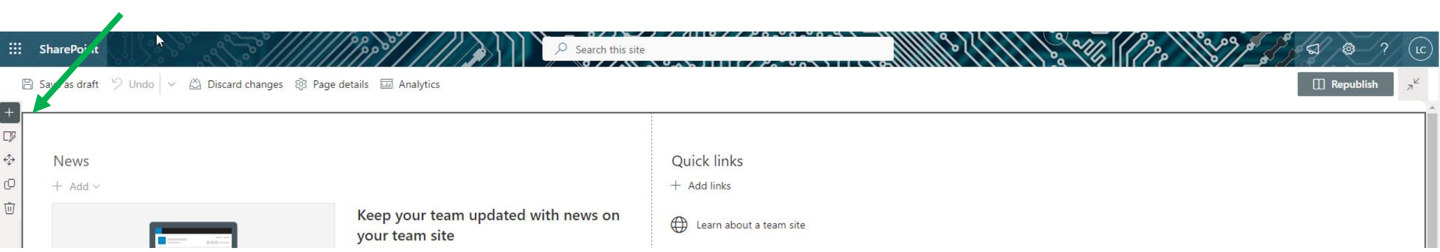
Editing Web Parts



When you click on EDIT your site will enter EDIT mode and hovering over any area will highlight the editable sections. As you practice you will be able to customize, add, delete and move these WEB PARTS around.

Before you add your timer, you are going to get started by adding a defined area to your site to house your timer and your contacts:

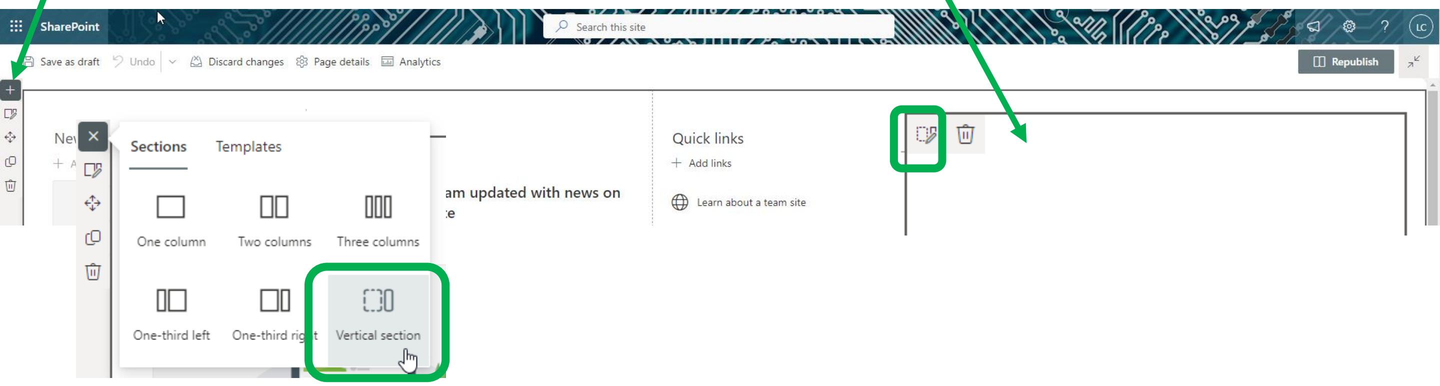
Click on the + sign in the top left corner to add a web part



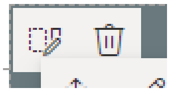
Add a vertical section

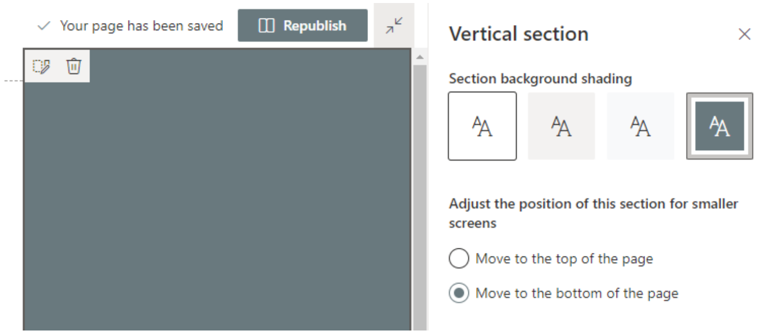
Click on the + to open the menu and select VERTICAL SECTION

This will add a new section to the right hand side of your screen

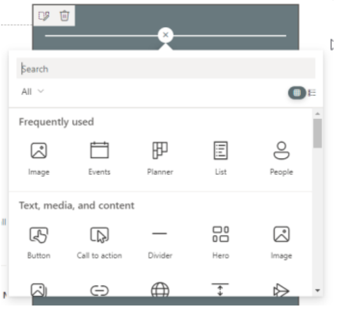


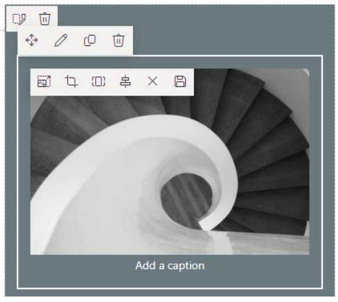
Click in the left hand corner of the section to edit it then choose your style:



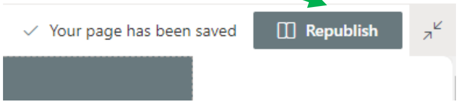


Hover with your cursor in the uppermost are of the section then click on the + to add something new – let's choose add an image by selecting the icon from the menu then follow the prompts…





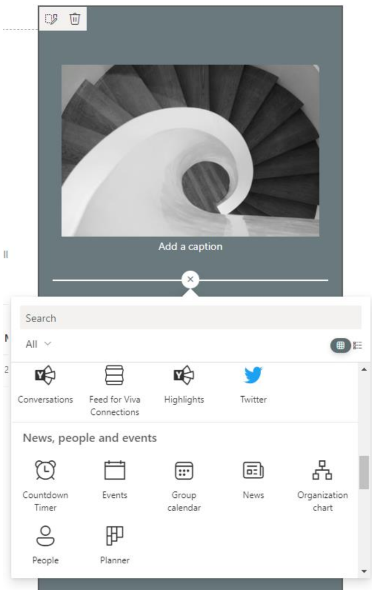
Click REPUBLISH when you have finished your work and see how it looks.



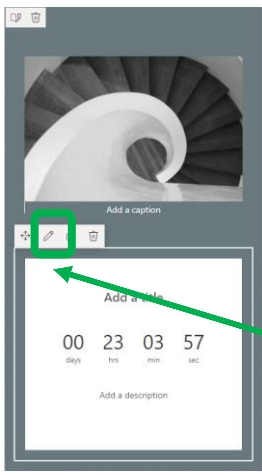
Add a countdown timer

Click edit to return to EDIT MODE

Add your COUNTDOWN TIMER directly below the image you just inserted by hovering beneath the image until the + appears



Scroll down through the menu and select Countdown Timer under NEWS, PEOPLE AND EVENTS

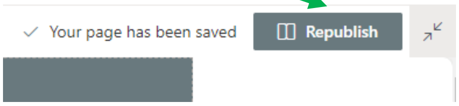


You have now added your timer which you can edit by clicking the pencil icon above it on the left.

Try the following steps:

1. **Add a title**
2. **Edit the days, hours, minutes and seconds to show only days**
3. **Add a description or call to action!**

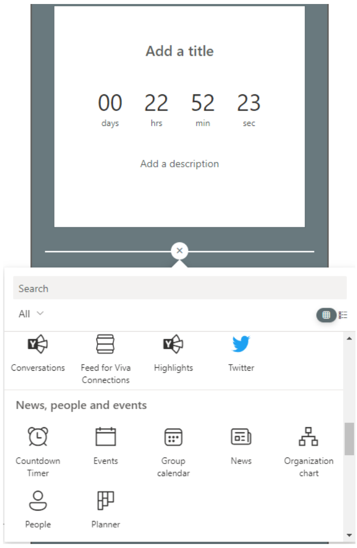
Click REPUBLISH when you have finished your work and see how it looks.



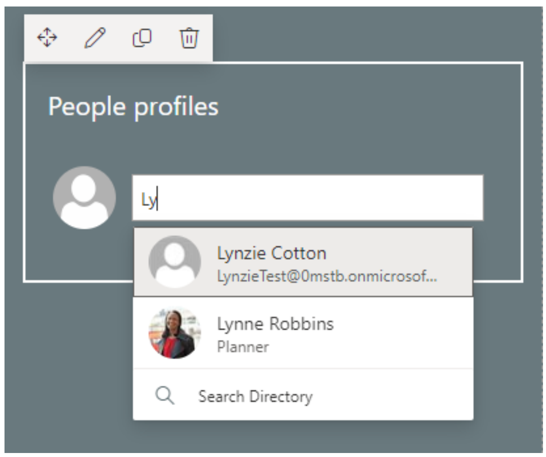
Add a contacts list

Click edit to return to EDIT MODE

Add your CONTACTS LIST directly below your countdown timer by hovering beneath the timer until the + appears



This time, scroll down through the menu and select PEOPLE under NEWS, PEOPLE AND EVENTS – you will be starting to get a feel for all the other possibilities on offer round about now!

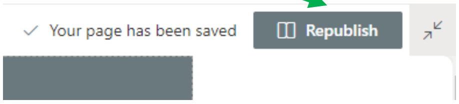


You have now added your list which you can edit by clicking the pencil icon above it on the left.

Try the following steps:

1. **Add a contact/contacts from your team**
2. **Choose the medium format option and add a description of their role and skills**
3. **REMEMBER to ensure they are added as members to your site!**

Click REPUBLISH when you have finished your work and see how it looks.

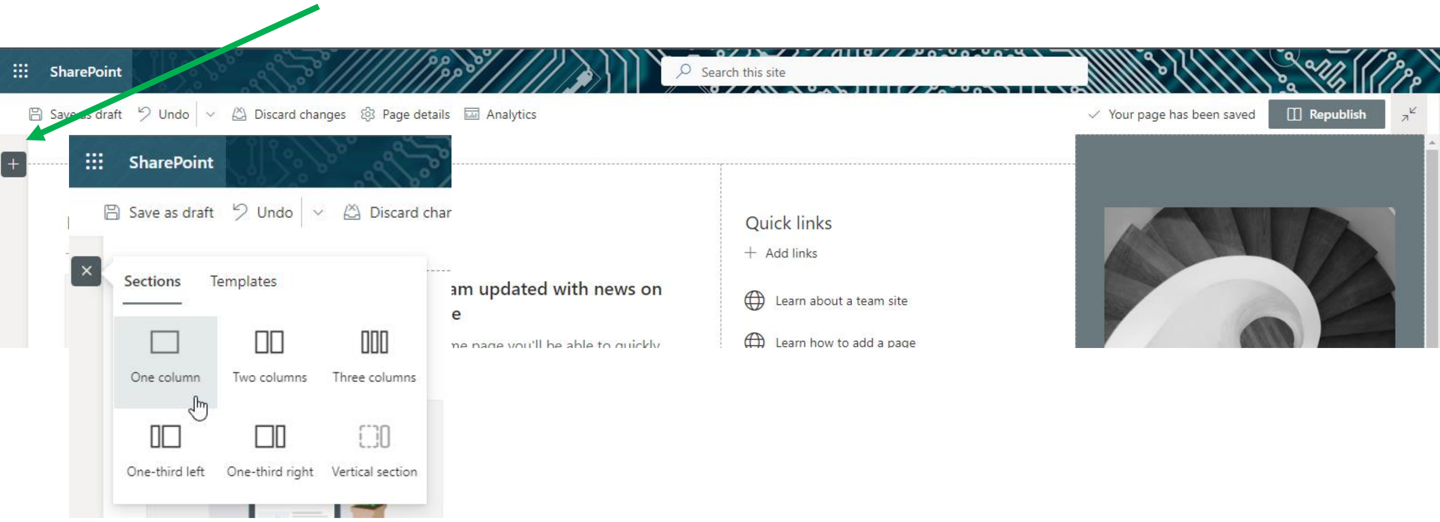


Add key events/milestones 1

Click edit to return to EDIT MODE

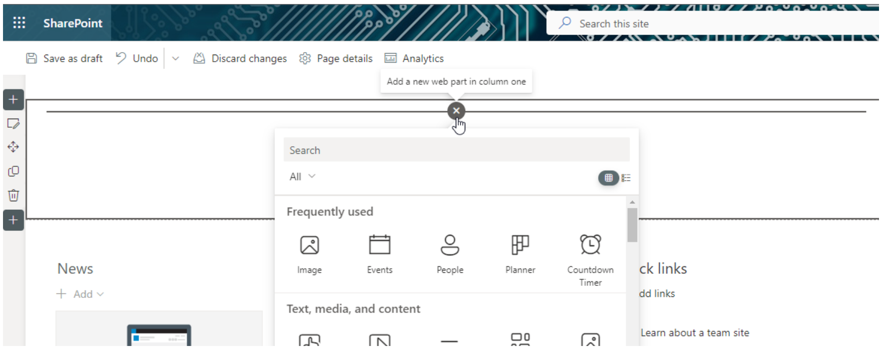
This time, we are going to add and events WEB PART to the main area at the top of our site.

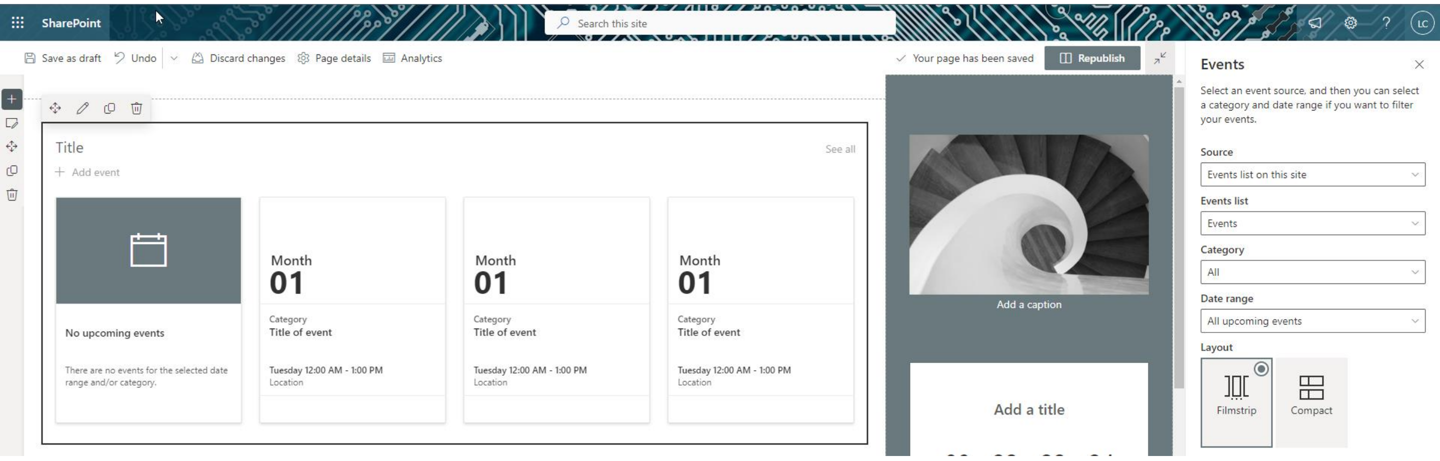
In EDIT MODE, click on the + to add a new single column section:



Hover at the top of your new webpart and when the + appears select EVENTS from the menu…

Are you starting to get a feel for it yet?





Add key events/milestones 2

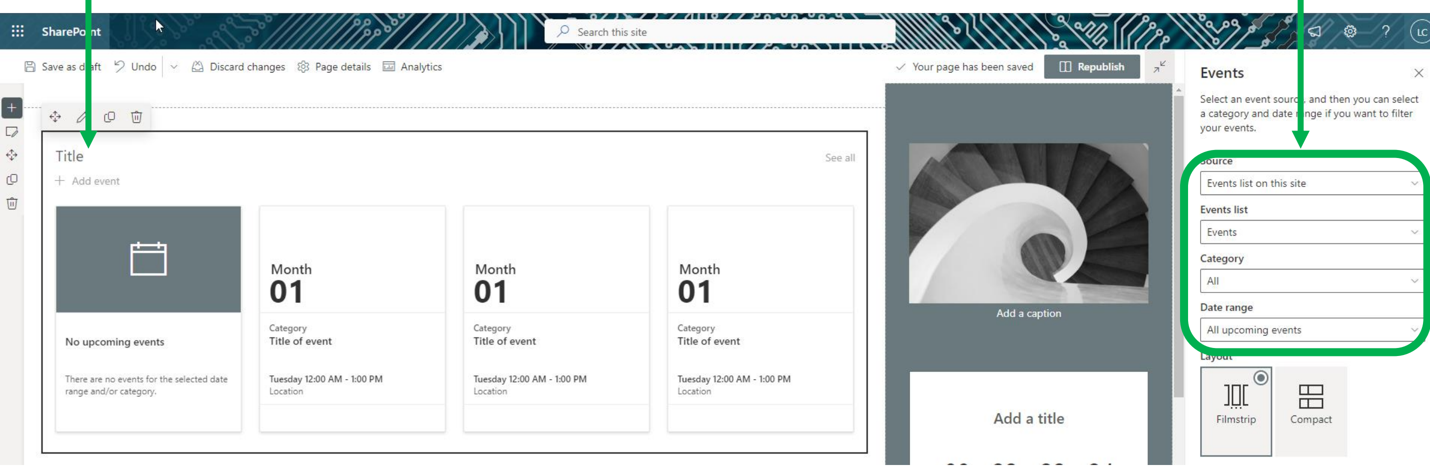
You have now added an EVENTS space which you can edit by clicking the pencil icon above it on the left.

You may have already noticed that there is a little more to do here to get your EVENTS section looking usable:

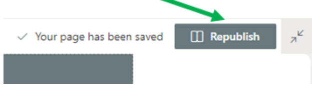
Add a workable title by typing over the suggested text.

IMPORTANT: You must republish your events section before adding events directly from your SharePoint Site!

For the purpose of this exercise – do not edit these settings!



Click REPUBLISH when you have finished your work and see how it looks.



Try the following steps:

1. **Add some important events – perhaps a meeting to kick off your project?**
2. **Add images and locations etc. – don't forget to invite your team!**

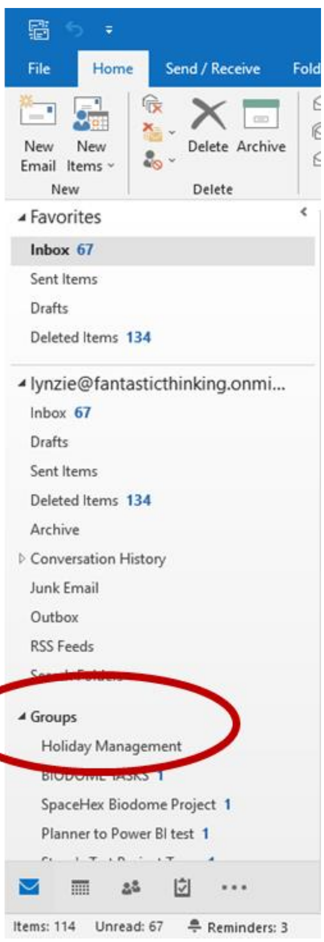
7. Calendar

When you create a new group by adding people to your site:

You get a group calendar

Any events which you add to the group calendar can automatically sync to your personal Outlook

DON'T WORRY – this doesn't happen the other way around: your personal calendar items won't sync to the group calendar.

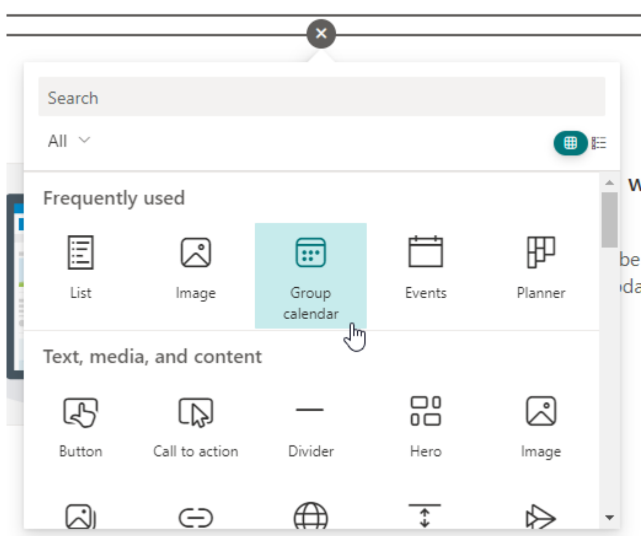


You can schedule a meeting or event directly from your SharePoint site

OR from your personal calendar by selecting GROUPS from the left hand navigation and choosing the relevant group

- Create your meeting as usual and add the group to the list of attendees

Use the Group Calendar WEBPART to embed your calendar into your Project Site:



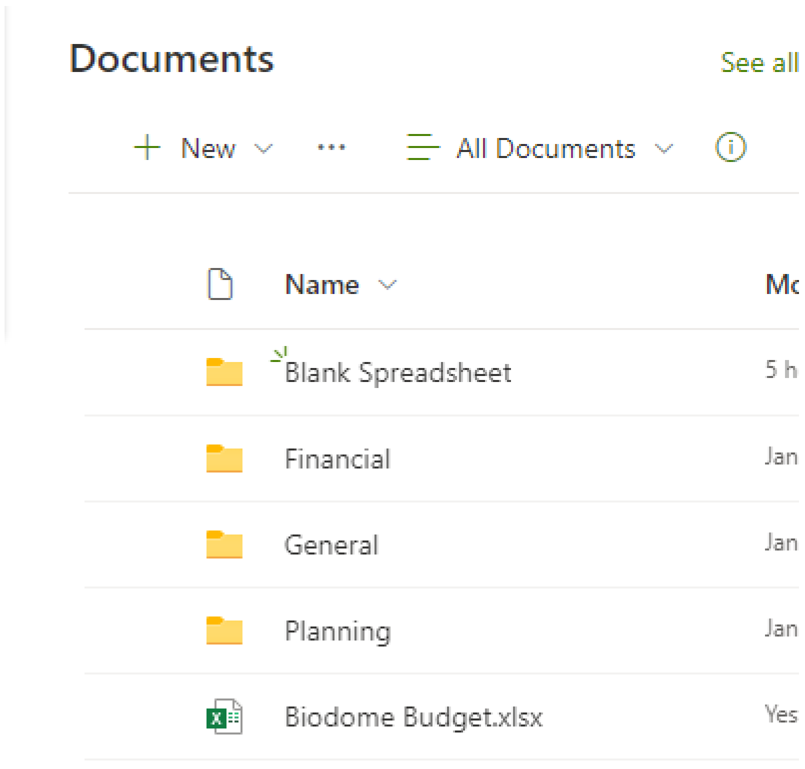
8. Document Library

When you create a SharePoint site – you will automatically get a DOCUMENT LIBRARY.

REMEMBER - Our PROJECT SITE is a SharePoint Teams Site made for teamwork!

If we wanted to present READ ONLY information – we could have built a Communication Site

The document library for our project will be full of collaborative documents…



Document Library

THINGS YOU CAN DO WITH A SHAREPOINT DOCUMENT LIBRARY:

- Add, edit, delete a file, folder, or link from a SharePoint document library, co-author, and download documents
- Control who has access to a library, a folder with in a library, or an individual file within a library
- Track the activity on a file, such as when it was last modified, and receive a notification when something has changed
- Share files or folders with others
- Add a link in a document library to something that is stored outside the library, for example, a link to a file located in a different library or even a link to an external web page.

WHY USE THE SHAREPOINT DOCUMENT LIBRARY?

- **What happens in SharePoint stays in SharePoint - SINGLE SOURCE OF TRUTH!**
- If you are working on your own 'stuff' – use OneDrive
- If you are working with your team – use SharePoint!
- DON'T USE EMAILS WITH ATTACHMENTS!
- This creates multiple copies of documents and creates risk!

9. Risk Management 1

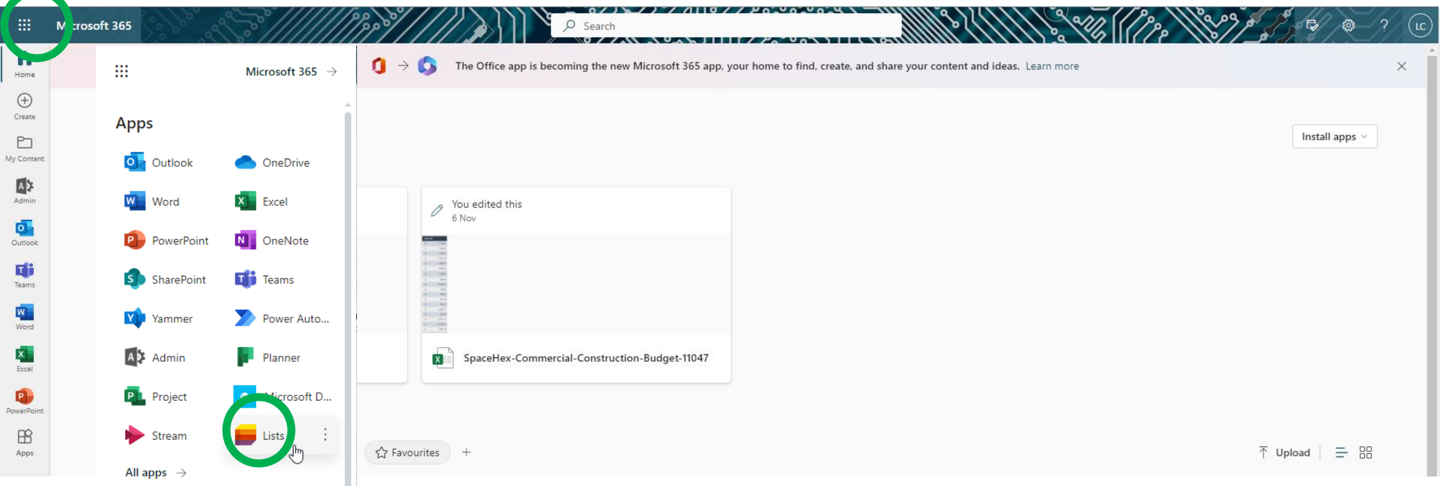
Risk management is a daunting topic but one which is essential to the successful completion of any project.

Key things to consider in managing risks to your project include exactly what the risk is, how likely it is to occur, what the impact of its occurrence might be and who is responsible for rectifying it and when.

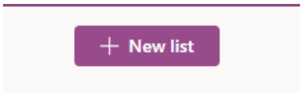
At the outset of your project, the team should decide how they want to quantify and action risks but for now we will be using Microsoft Lists to add a RISK LOG to your SharePoint Project Hub.

I have included a range of columns and response types which you can edit as needed.

From the M365 home page click on the waffle to locate LISTS:



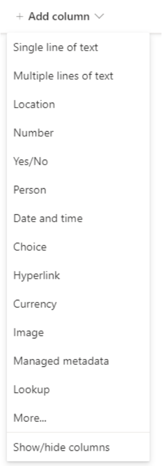
From the LISTS homepage click + New List and follow these steps:



1. Select BLANK LIST
2. Add a name, description, colour code and icon
3. Save your list to MY LISTS – this means you can re-use your columns in the future

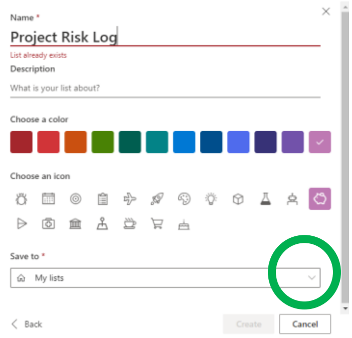
Risk Management 2

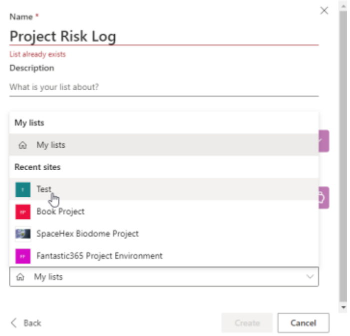
4. LISTS provides a comprehensive range of content types to choose from. Go ahead and add the following columns with their corresponding types – add colour coding if you like:



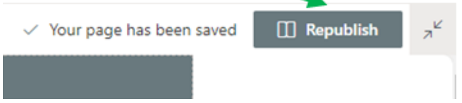
Title	Provided
Risk Description	Multiple lines of text
Probability	Choice – low, medium, high
Impact	Choice – low, medium, high
Trigger	Multiple lines of text
Status	Choice – New, open, resolved
Mitigating action/s	Multiple lines of text
Solution Due Date	Date and time
Owner	Person
Updates	Multiple lines of text
Last updated	Date and time
Date resolved	Date and time

5. When your list is ready – go back to the LISTS homepage and click +NEW LIST
6. This time click create from an EXISTING LIST and select the one you prepared
7. You can now use a copy of this list especially for your project with its own name, colour and icon. SAVE THIS NEW LIST TO THE SITE YOU WANT TO USE IT FOR
8. When your list is ready go back to your SharePoint site…
9. In EDIT MODE, choose where you would like to add your RISK LOG
10. Click the + to add your item then select LIST from the menu – a tiny thumbnail of your saved list will appear in the box. Click this and it will open up!





Click REPUBLISH when you have finished your work and see how it looks.



10. Dashboard - Planner

Planner is a simple project management tool designed for keeping track of projects and tasks in small/medium businesses.

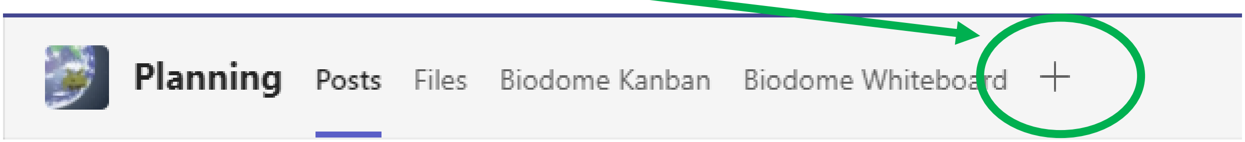
Users create cards in order to keep track of:

- What needs to be done
- What is being worked on
- What has been completed

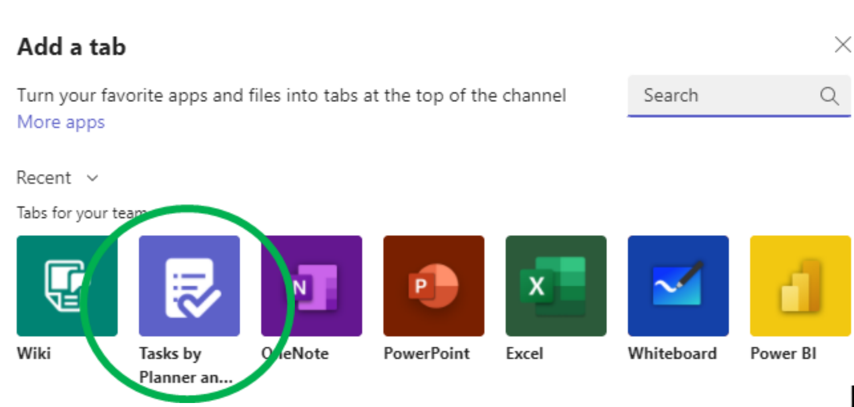
You can create a Planner board straight from the Planner app in M365, directly from your SharePoint site OR from MS Teams.

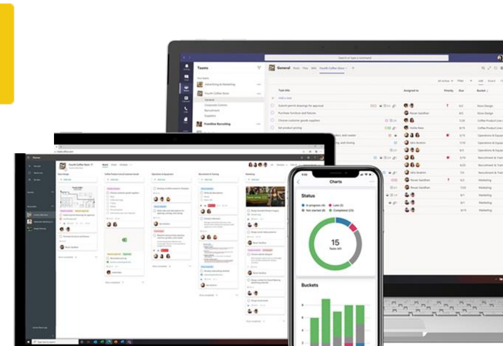
For the purpose of this workshop, we created a Plan straight from the PLANNING CHANNEL in our corresponding MS Teams area:

To do this click here to add a new TAB:



Choose TASKS BY PLANNER from the menu then follow the steps to name and describe your new plan:



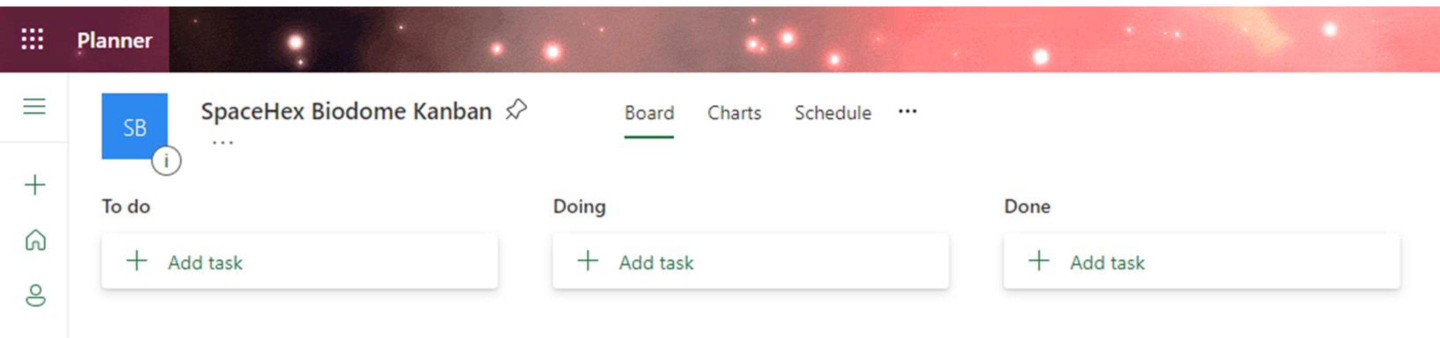


Dashboard – Planner 2

Planner is a KANBAN based tool which uses BUCKETS to categorise your tasks:

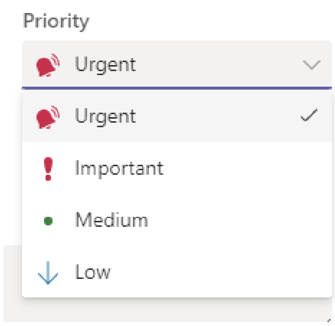
Create your BUCKETS according to the type of project you are working on.

A really simple way to start is to use three buckets:

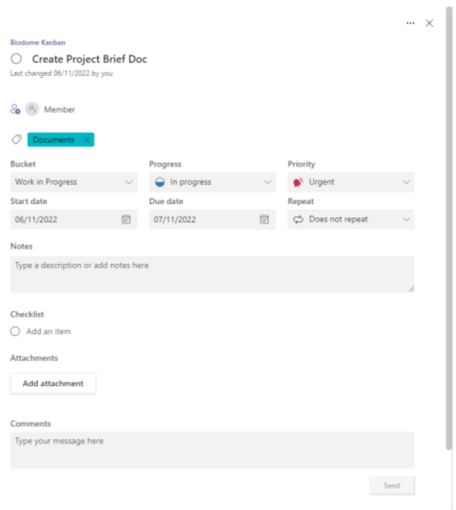


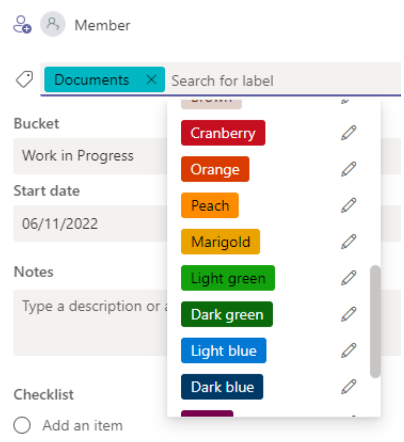
Once you have the structure of your board planned out, add tasks under the TO DO (first bucket) according to what you need to achieve.

You can then use labels to categorise your tasks, mark their status (to do, in progress, complete), set their priority and due date, add notes and even a checklist if your task can be split into smaller sub tasks.



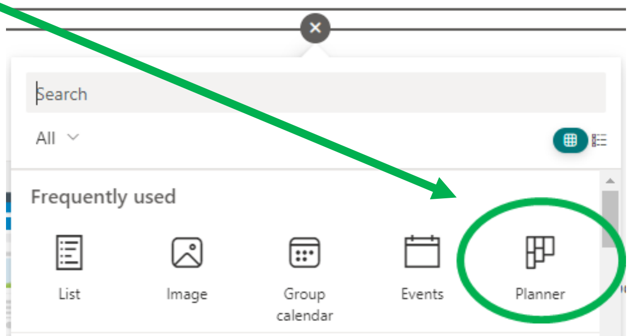
Don't forget to assign tasks to individual members of your team!





Dashboard – Planner 3

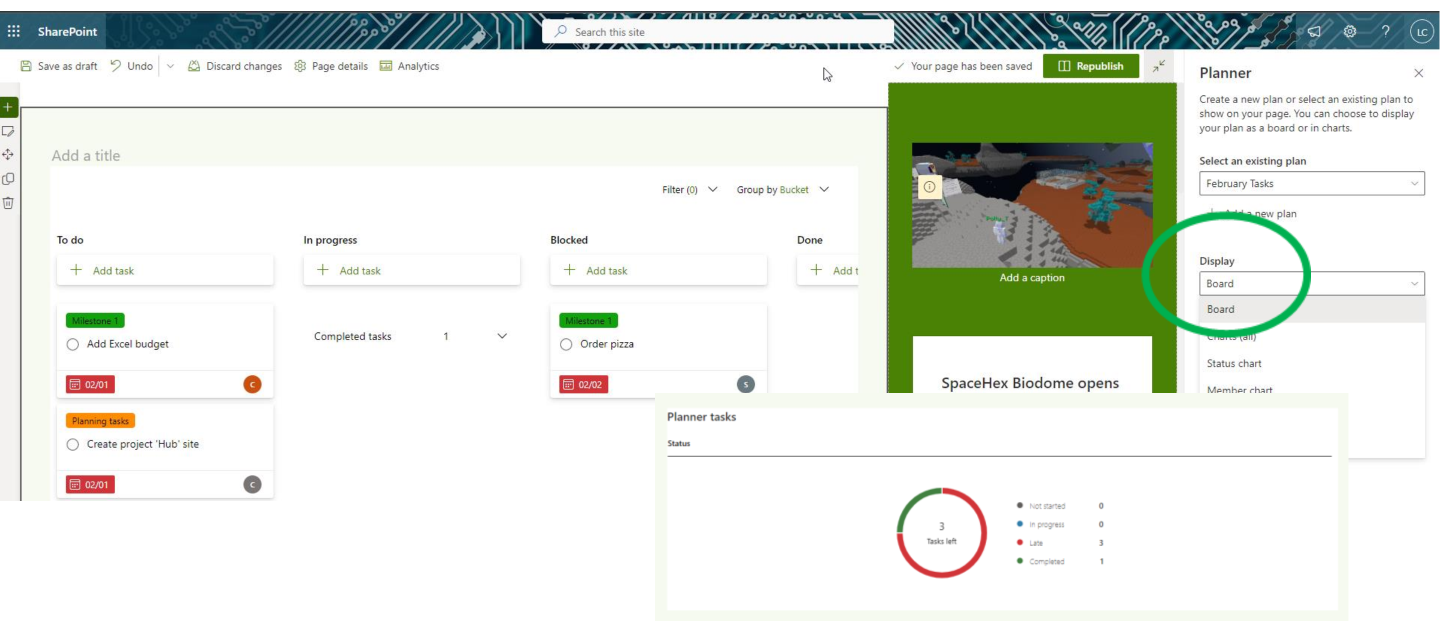
You can now show your PLANNER BOARD in your Project Site by choosing the appropriate WEB PART:



When your Planner board is added, you will have the option to select the view you wish to show on your site:

Under DISPLAY you can visualise your plan by board, status, member etc. – in the workshop we chose to show the status view which provides information about the tasks progress.

NOTE: You can also change the view you wish to see in your TAB in MS Teams.



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11. Project Costs/Budget

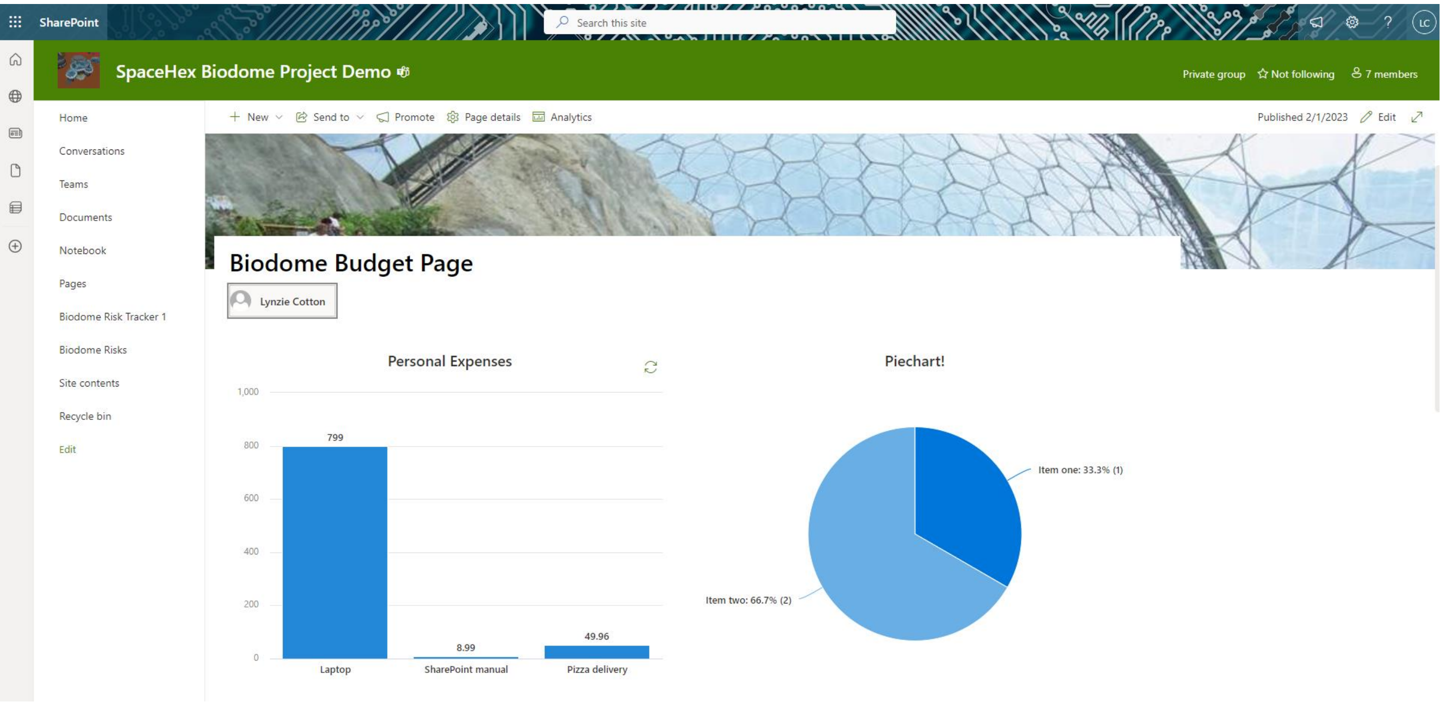
There are many ways to manage your financial information within your project environment:

Of course, it is perfectly possible that you don't need to show any financial or budgetary data outside of your Teams or document libraries.

During the workshop we focused on two things:

1. Adding an Excel workbook/spreadsheet to your PROJECT SITE

2. Creating a BUDGET TRACKER using the QUICK CHART web part

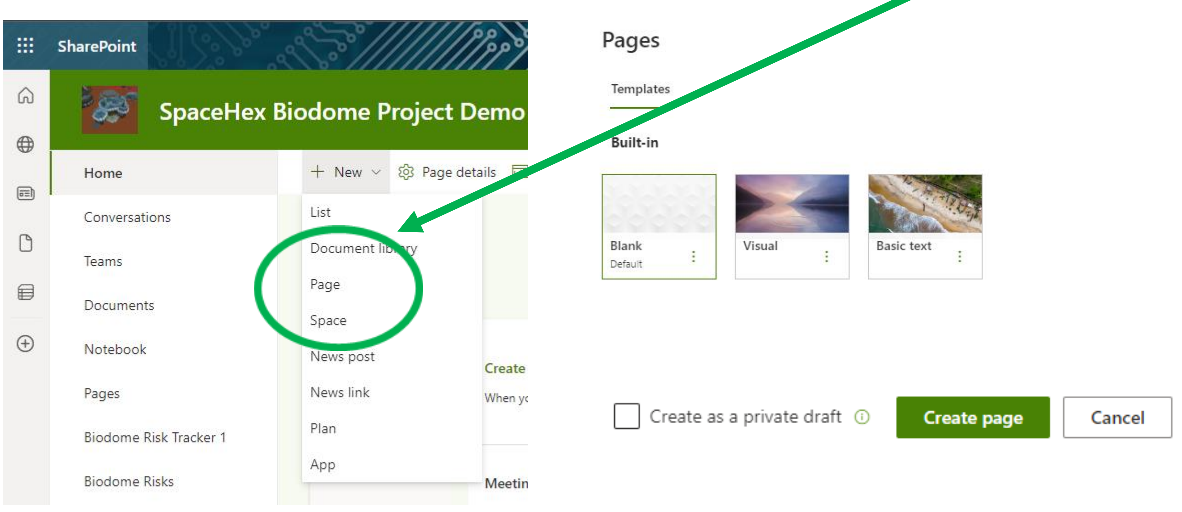


Firstly, we created a new page for the site…

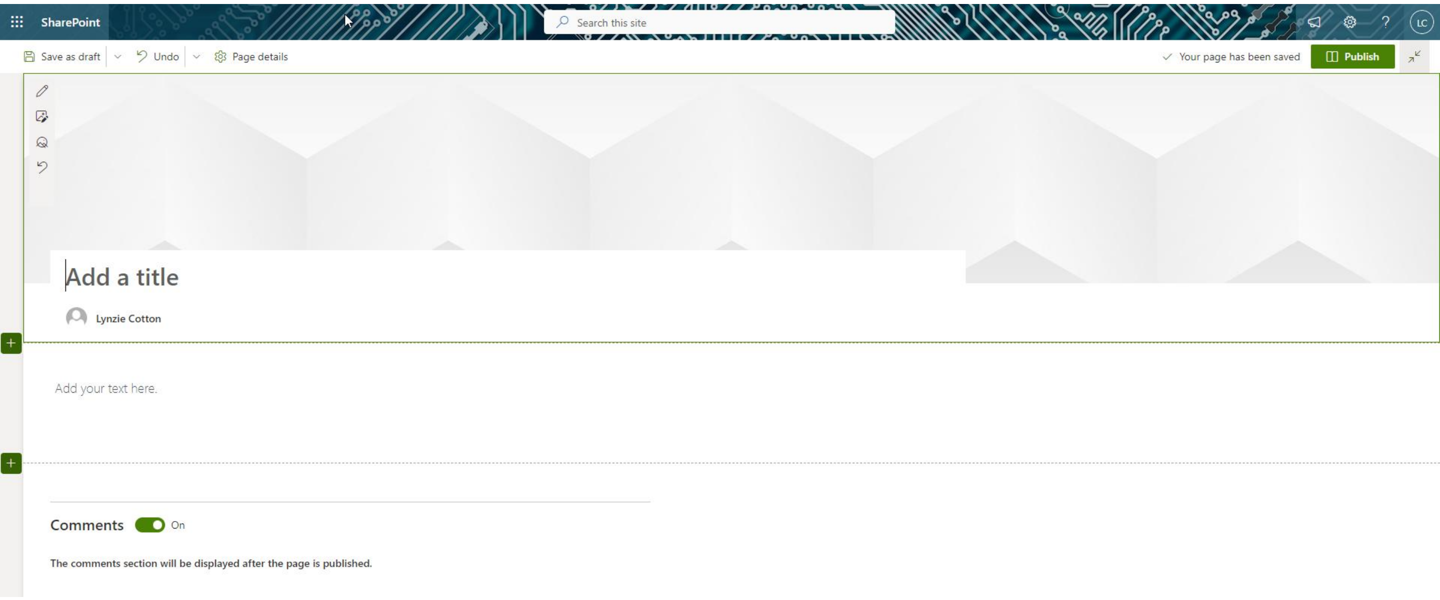
Project Costs/Budget

It isn’t essential to add pages but if you would like to separate aspects of your project, it is very easy to do.

In order to create a new page, simply click NEW at the top of your site and select PAGE. You can then select a template and click to CREATE PAGE:



Follow the steps to add an image, give your page a title and add it to your SITE NAVIGATION



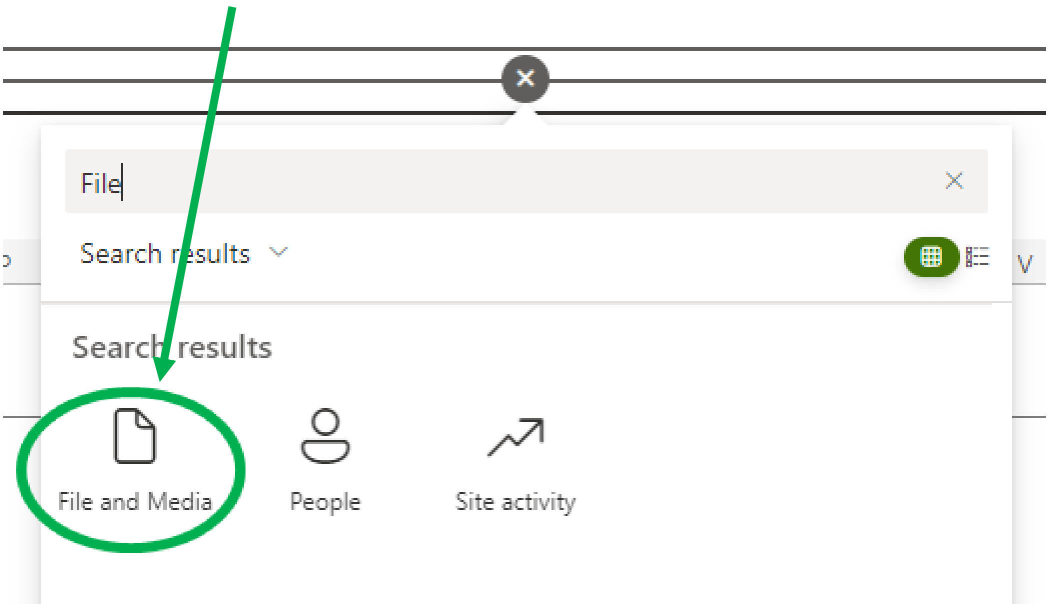
Project Costs/Budget

Once your new page is created, you can add WEB PARTS in the usual way so now we can go ahead and embed an EXCEL workbook:

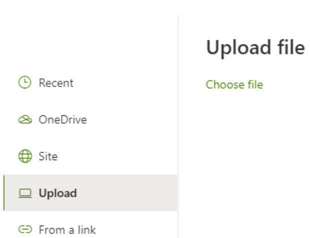
1. Embedding an EXCEL workbook:

NOTE: Before you start, you need to ensure you have an appropriate EXCEL file to use.

There is no EXCEL item in the Web Part menu – so when you click to add your web part select **FILE AND MEDIA**



Then simply select the file you want to add from your recent files, OneDrive, site files etc..

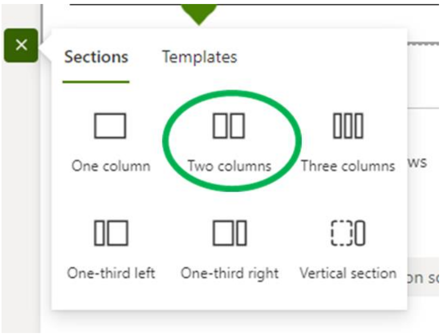


2. Creating a BUDGET TRACKER using the QUICK CHART web part

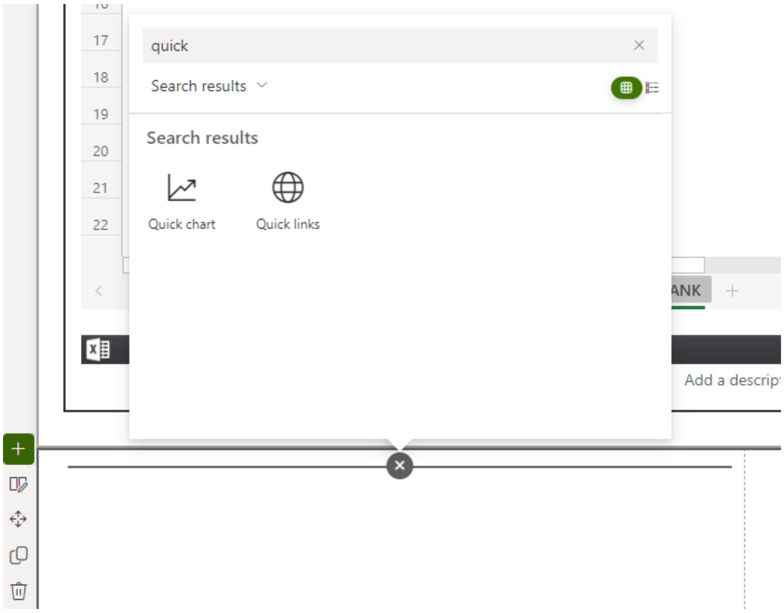
NOTE: Before you start, you need to ensure you have created a LIST in MS LISTS which your tracker will pull information from. You can refer back to the Risk Management section of this workbook for a refresher on how to do this (you won't need to display your budget list on your site).

In order to do this, we will first add a new SECTION to the budget page by clicking on the GREEN CROSS on the left hand side.

We will choose the TWO COLUMN OPTION:

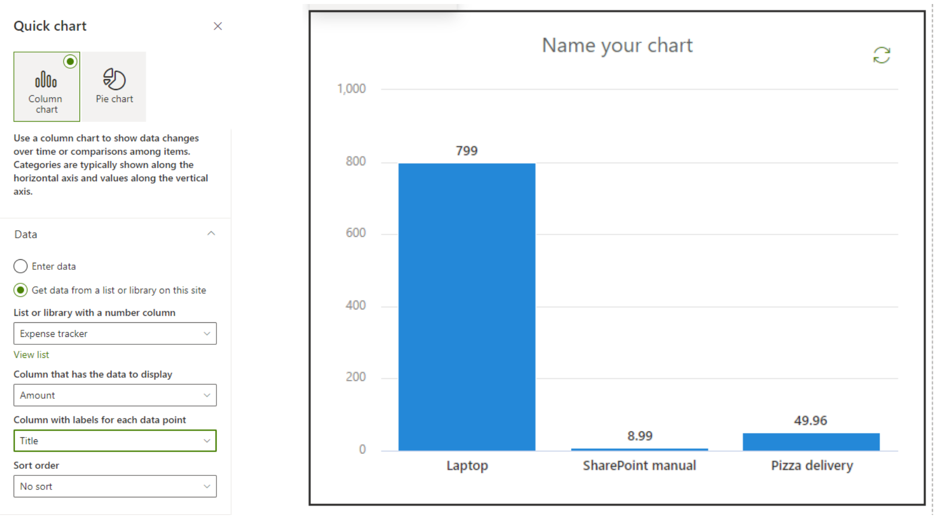


We can now add a QUICK CHART web part to the left hand column:

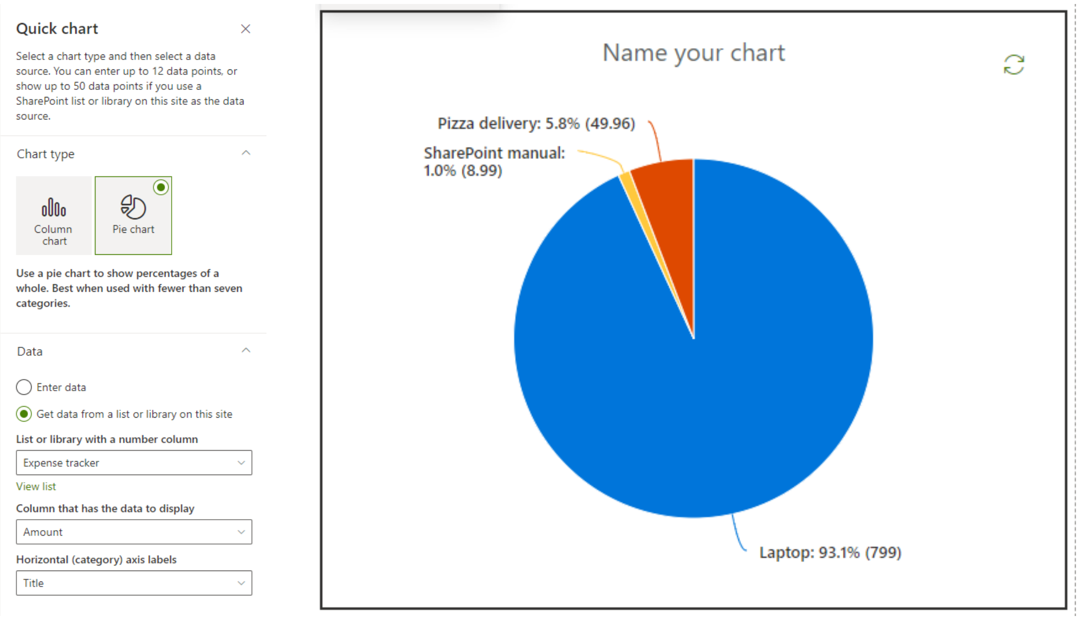


Project Costs/Budget

Edit your new web part to show a Column Chart and choose your LIST from the drop down – it will then pull your budgetary information straight from the list.

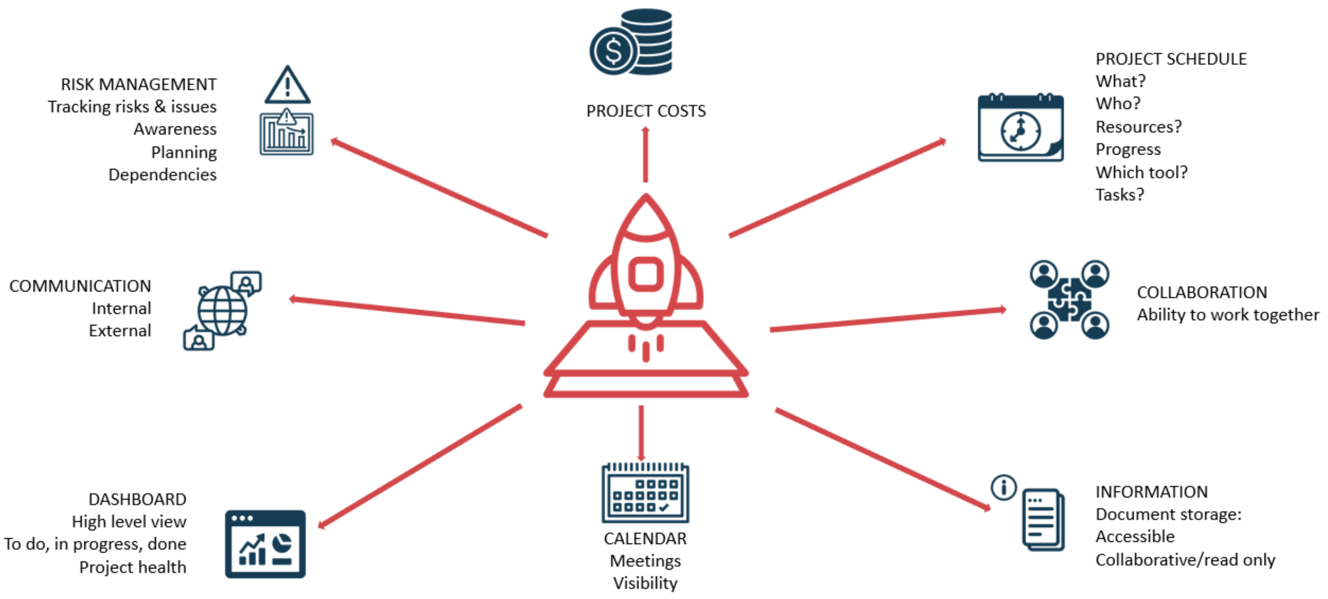


We can now add a QUICK CHART web part to the right hand column to show the information in a different way or pull from a different LIST depending on your needs:



We have now assembled all the elements of a great project management environment

After following this guide you will have all the basics to run a small project – you can build on your environment, add any elements you like to use and add functionality and sophistication as necessary.



Once again…

…I hope you have enjoyed the ULTIMATE GUIDE TO PROJECT MANAGEMENT WITH SHAREPOINT & MS TEAMS workshop.

I also hope this WORKBOOK has helped you create your own project site.

If you have any feedback, questions or queries I would love to hear from you – please post in the Academy Space at Collab365 to get in touch: myself or the Collab365 team will be pleased to help!

Lynzie Cotton

Thank you

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