



Webinar Transcript of Document Collaboration in Project Online With SharePoint

So the things we're going to be covering in this session are going to be the relationship between SharePoint sites and Project Online. We're going to talk about how document collaboration takes place on a per project basis and how to get the most from your document collaboration using SharePoint using document templates. Things like that. I'll go ahead and take the.

Slide off the screen and we'll dive immediately into Microsoft project online.

So. If you're taking a look at my screen right now. You should see well, let's me make sure that I have sharing turned on to the correct screen.

Yep, OK, great. So you should see an instance of project online. The instance that we're using is a pretty standard Microsoft demo demonstration instance. We're going to see that it has a number of projects already within it. It has capacity for risk, issues, deliverables, all sorts of

things like that to be supported within the collaboration

workspace. But just to get us.

Off to a good start, let's talk about how these two

things even come together in the 1st place. So when

Microsoft was building up its Cloud based project management

or server-based project management tool, they were looking for a way to handle a

few of the significant use cases that project teams often have to

deal with, and they wanted to be able to do that in a very

integrated way. Connecting the projects with the collaboration

capabilities that teams typically rely upon. So when

they started looking at how they were going to build up this web

based experience, they looked over into the SharePoint.

Stack the tools that they had available over there and they

decided that they would actually create a creative project.

Server based platform on top of the SharePoint Stack. This had

some advantages for them. They were able to first of all have

automatically a document management capability.

SharePoint is a great tool for doing document management, has

the ability to do approval routing has the ability to have

libraries and file structures. You can create document

templates. You can also template entire document sets. So

especially in the world of project management you might

have a set of assets that you.

Commonly rely on during analysis or you commonly rely on during

design. You can actually create an entire set of documents that

are used and when your various team members want to.

Started a new project. They can go directly into the Document

Library of the project and they can call up your standard set.

Maybe we're doing like the business case development. We

need to have a project charter. We need to have a essential

project justification and we also have a more detailed

business case, so those can be 3 documents, for instance that are

part of a document set and like I said when somebody first creates

their proto project.

They can go ahead and launch that document set. OK, so those

are some capabilities that were really important. Another big

capability that Microsoft provide in SharePoint that

everybody got excited about for when they were building up the

project server and project online experience was the

availability of lists by now. I'm sure you guys have been

using SharePoint list for some time and so we'll just dive into

what one of our.

Project sites look like so we can get a feel for

how that turned out, so I've got an example here.

Ann will see that in our project site associated with this

project, there is a list for issues. There is a list for

risks. There's a list for keeping track of deliverables,

so then we can extend this. We can add all sorts of additional

lists or other information we need to track. A very typical

example would be the points of contact for the stakeholders of

the project or if we were doing.

Projects for 3rd party. Like for the government or for as a

contractor to some other company, we might have the list

of all the contacts and.

Locations of offices, things like that for.

The government over that other company, so those were key

features and they then become a foundational layer for keeping

track of documents in their collaboration information. So at

that point, Microsoft fully integrated the project

capability on top of SharePoint. The end result of this is that

as we notice, we were able to select a project. We're able to

see the details of the project back up here one step up.

Like the schedule or what stage in the life of the project does

this project happen to be in? If you're using a formal, structured project lifecycle, all those things are immediately available as metadata about the project. Sitting here on the left hand navigation, but we also can immediately jump down into each individual project site that's associated with the project and that project site. Just for reference, if you're used to SharePoint, that project site is basically a derivative. Of the SharePoint team site so it has few extra bells whistles that were added but otherwise it should behave exactly as you're familiar with in used to in any existing SharePoint team site.

OK.

Each this is that every time we create a new project, it is possible for an individual project site to be created.

It doesn't have to be. Depending on the settings that templates, the things that you decide in Microsoft project what you're going to select.

And I select for instance a. You know a simple project where I don't need a lot of collaboration. Or am I doing some big rollout for it? Or some big construction project where I need a lot of collaboration? I can actually choose whether or not to create that site, and in addition to that, when we create

the site we can have it actually specifically provide us the pieces and parts that are relevant to us like this project site of course has the base.

Document Management library that you're used to from any SharePoint team site. But we also have a record management library at digital Asset management library business process automation library, so there are additional pieces that have been added to the template of this SharePoint site.

That way, when I create a brand new project or launch that will actually have this whole structure built up for me in waiting for me when I come into the collaboration site in the 1st place. Now we talked about the idea of.

Being able to use SharePoint and document templates well to use document templates in SharePoint and that all relies on some features and capabilities that you'll be able to see surfaced in the new button directly within that document folder. So how do we go about doing that well?

Within a particular.

Within every SharePoint site we actually have this capability of having different.

Content types that are associated with the SharePoint site that we're looking at, so I'm going to expose those content types, make them more obvious as we notice I went to the advanced settings for the Document library in question and we would do this in a. You know, as we were building up our SharePoint site template, go to the event sayings, we expose the content types and we're going to go ahead and add a additional content type called a document

set. So the document set is going to contain one or more specific. Documents that are considered to be a part of.

This. Um?

This template. So we'll go ahead and accept that we've now exposed it as part of the SharePoint site and within the document set we can add any additional.

Documents that we want to contain within that particular type. Now I'm going to go back and I'm going to create an example here just to make this really clear and obvious, so I'll go back to the root of our.

Project experience.

I go to the site collection. It's site collection is basically the set of all sites that are apart of in SharePoint

that are part of project. The project management component re
all that software sits at the root, the topmost site but below
that we can have a whole set of sites and that's what we're
referring to. We talked about the project sites so I'm going
to go into the.

Psy content types.

From the top layer an I'm going
to. Create a new content type.

And this one is going to be
derived. From the document set content type so the only content
type that happens to be there is called document set. We want to
call this the analysis.

Templates.

And I will go ahead and.

Put this into.

The document set content type so that it will show up when I'm
looking for it later.

So that gives us a starting point. Now, as soon as I create
this, it shows me that I have the ability to.

I go into the document set settings.

An I can start adding the default content that is in this

document set. So here we're just going to throw a couple random pieces of information into.

Our document, so let me find a.

Let's see, maybe licensing. Maybe I'm doing a document set for analysis of an IT project, and so maybe I'm going to put in a licensing spreadsheet. I might.

Grab a what else?

Let's see here.

I might have some kind of an NDA agreement that I want to load up.

So I can just keep adding each of the different pieces and I can provide a folder structure here if I want to so that it will automatically drop all these into some kind of a sub folder structure. But it's worth noting that when I create this document set and make it available, this document set itself will have sort of a folder structure to begin with.

So I'm going to keep this simple for the moment and just go ahead and it OK. So I have a new template document set that is called analysis templates and it contains those two particular.

Template documents waiting for me now I'm going to go back into

that SharePoint site that I was playing around with.

Anne, I'm going to go ahead and add.

That document set to the documents folder, the regular documents folder, so that I'll be able to see it so right now if I click here, I see that the thing that I added before just plain document set. It's sitting here, but I'm going to go ahead and add the analysis templates to this. So we'll go into the settings.

And remember again, you know, although I'm doing it within a specific project at this moment, the reality is what I would be doing is creating this as a project site template.

To be used by everybody, and then that would be made available so that every time I created a new project, that template would show up. So as we notice, I added the analysis templates to the set of things that are available to me in this. Document library and now if I click new I see that the analysis templates are saying there. What happens when I go ahead and say I want a new document set containing the analysis templates?

Great, so it asked me for a name. I'll just say analysis.

It save.

OK, and there we are. We have what looks like a folder called analysis within the documents area and we see the two assets that I posted into my template are sitting there waiting for me to get to work on them. This allows us a couple of really interesting things. One big thing is it allows us to have a centralized control as the PM oh of what sets of documents people are expected to use for analysis, for design, for build and implementation for testing.

For maintenance and support, whatever. So we get to create a, you know a known best version of the template and we can manage that from a central point so that as the PM oh, we are always declaring what is the current version of things that we're expecting from about this then plays out. You know, of course, in terms of making sure we have all the right deliverables, all the things that are expected throughout the lifecycle of the project. So that we can check those, check all those boxes and so that when we reached the point where we're doing our project closeout and trying to get our lessons learned, we know that we had and we're relying on the most up-to-date set of templates. We're not having to make people go back and do rework.

So that's particularly interesting now. Over and beyond that, as I mentioned.

In our template we can go ahead and add a whole new set of things like maybe we have a.

Bug lists, or maybe we have an action item list or like

I said, a contact list.

So how do we? How do we go about starting to add additional things to this?

Template that we're imagining into existence here. Well, now at the bottom of the list we see site contents. We can also get to site contents by going into their upper right corner and click in the Gear icon. The gear icon always allows us to see our settings, so either way we get site contents and then we can immediately start adding either lists or apps. Apps are basically the same thing as list. There could be extra things in there, but in general, if we wanted to just create a blank list, we could just.

Click on that at the top if we wanted to create specific things to hold, maybe.

A picture library we can create that if we wanted to create a set of promoted links. Promoted links enable

us to put like a set of links on a page. If we're crying of creating a landing page and each of those links can look like a tile and they can have associated with them a picture so that we can create better navigation so we can create all these pieces and parts and we can make our SharePoint site be exactly what we want it to be. Every single time that somebody creates a new project.

OK.

So we've kind of talked through what the possibilities look like at this point. I want to also just ask, you know, are there questions? So if you raise your hand or put in chat, any questions that may be on your mind, we'd love to hear from you about those things. Otherwise I can go into a few more details with the time that we have left.

Up to up TB on the on the line today.

So we'll watch the chat for just a few moments here, just to see if there's anything that anyone wants to share with us.

Otherwise, I'll go ahead and put some points out there to kind of wrap this up and then we will wrap up the webinar.

This. This will be, of course, it is being recorded, so we'll of course make this available for anyone to look back and to

see what we covered.

Cole give it another couple seconds.

Alright, so no questions so far that's great. At this point I'll go ahead and just create a couple interesting things to wrap up our supposed.

Project site template.

We're just going to create a stakeholder contact list.

Kay?

And I'll go ahead and create one more thing I talked a little bit about the idea of a landing page, so I'm just going to create something really quick here.

So the idea of promoted links will call that are landing links.

OK, I just saw a question come up in the chat so we have this question. How can my team add project related files to existing libraries? So anything since we are down in a particular project site where in the project site called HIPAA Data Compliance implementation we got to that site from our project details associated with the. Project schedule and all the business case information.

We got to the particular project by coming through the project

Center and the left hand navigation. So if I got down into the project site once I'm in the project site, I can go into document management and I can always upload. So I showed you how it can create, you know, a new new item in the site from either a document set or you know by go ahead and just adding any of the template documents. But I can also upload any.

Files or I can now play the whole folder. So you know if I wanted to just grab everything that was on my desktop, for instance, I could absolutely do that it open and it will drag those things into.

Power library here.

So if you have them, for instance in file shares, or if you have them on somebody's desktop once we upload them, of course they become part of the cloud based experience and everyone has access to them. They can get access to this information through. There's ways to get access to the information through Microsoft Teams through one drive, so we have a lot of flexibility there in how we interact with the content. And of course, depending on whether or not you choose to turn on version control you also have.

The whole versioning and sub versioning aspect to this, where

if somebody changes something you can go back and look at the past. So I delete something you can go to the recycle bin. You can recover the file. All those kinds of features are sitting here waiting for us to take advantage of them. OK, and just to kind of wrap it up, we had this home page here and as you notice, a few moments ago I created a brand new Contacts list. We want to make this available and easy to find on the homepage, so I'm going to go ahead and add that contact list from the list of potential components. There are also known as web parts, but here we have. Let's see.

I may have jumped down into a different. Oh, there it is. Landing links and then stakeholder Contacts cool. So I will go ahead and add stakeholder Contacts. It'll add it. So that's sitting here on our landing page and that'll kind of wrap it up, but you get kind of a picture here that we can have this flexible SharePoint based experience that enables us to better collaborate, enables us to build out common templates that we want people to use in the conduct of the projects. And we of course at Green data are more than happy to hear any further questions. We can absolutely reach out to you guys

and share additional deeper dives into some of these

features and capabilities. So please do let us know. Ann will.

Of course, as I mentioned before, would be sending out

this video so that you guys can review it at your leisure. There

will also be a follow on survey we have a few questions that we

want to check in with everybody

about. But thank you very much for your time today. We

appreciate it and we hope you have a great Thursday.