



# Using Microsoft SharePoint for Project Management

A WHITE PAPER PRESENTED BY ASPE

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A modern Project Management Information System (PMIS) is a collaborative solution that allows for the management of projects and the documentation and processes associated with them. Dozens of solutions exist; however, if you have implemented Microsoft SharePoint or plan to implement it, you may already have one of the best PMIS solutions available today.

## THE MISSING PMIS SOLUTION

Today, the vast majority of organizations use many tools to manage their projects. The project manager from the Accounting department may choose to track everything with Excel. In Product Development, they may use Microsoft Project. The IT department may have an online open source PMIS that they use for their internal projects. The point is simple: most organizations allow their employees to use the tools at their disposal to get the job done.

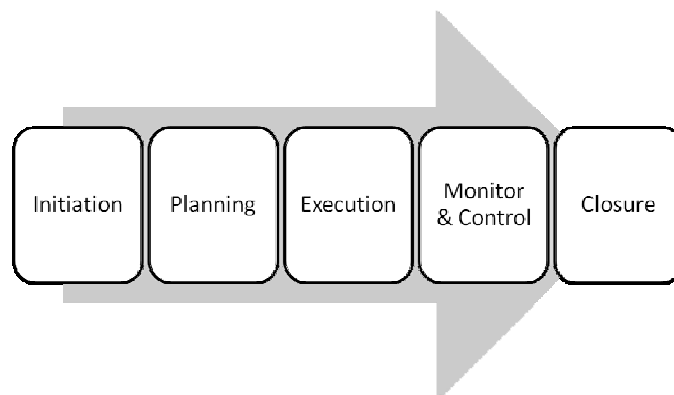
The end result of this reality is the lack of centralization. Project management documents are scattered throughout the organization. Some of the documents are on servers, while others are in local folders on the users' desktop computers. What if all of this information was centralized? What if one place existed for the storage, retrieval and management of all project management files – regardless of the file type? In order to accomplish this, a centralized solution must be implemented. Furthermore, that solution must support the storage of any document type and links to or integration with other applications. In addition, tremendous benefit would come from the inclusion of workflow management.

Microsoft SharePoint provides all of these features and more. Using Microsoft SharePoint, you can centrally store documents and collaborate on the management and workflows related to those documents. You can also link to other applications or websites where information related to the projects is stored.

To help you understand how Microsoft SharePoint can assist you in implementing a collaborative PMIS, this whitepaper will step through the five phases of a project. For each phase, ways in which Microsoft SharePoint can be used to manage the processes within each phase are suggested.

## PROJECT MANAGEMENT PROCESSES

The Project Management Institute (PMI) suggests the following five phases or stages in project management:



Projects are divided into phases in order to ensure that the proper work is completed within each phase. Instead of treating the project as one big task, we break it into multiple phases with inputs, processes and outputs. While it is beyond the scope of this whitepaper to fully explain the phases and processes suggested for Project Management Professionals (PMPs), the following sections will provide Microsoft SharePoint utilization suggestions for each phase.

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## INITIATION WITH SHAREPOINT

During the Initiation phase of a project, the project manager works with the sponsor and, potentially, the key stakeholders to ensure that the project is well-founded, well-funded and aligned with organizational objectives. Processes that may be performed during the initiation stage include:

- Feasibility analysis
- Vendor selection
- Goal clarification
- Responsibility assignment
- Rough budget and schedule estimation

Ultimately, the goal of initiation is to ensure that the project is authorized. The proof of authorization is usually a document known as the Project Charter; however, this charter is built from information gathered during the many processes executed in the Initiation phase.

**NOTE:** As you read through this whitepaper, remember that the five process groups (phases) are not necessarily finish-to-start groups. Planning may overlap backwards onto Initiation and Monitor & Control will always overlap Execution.

The workflow feature of Microsoft SharePoint can be used to enforce adherence to organizational project management policies regardless of the tools used by the project manager. For example, one project manager may report the results of the feasibility study in a Word document and another may use Excel; however, both project managers can store the files in a Microsoft SharePoint document library and the documents can be processed according to workflow rules. Consider the following workflow:

1. Project manager submits the feasibility report.
2. Sponsor is notified of the report and tasked with approving/rejecting the report.
3. Sponsor approves report and indicates that a particular solution should be implemented.
4. Project manager is tasked with developing a project charter for the proposed solution.

Microsoft SharePoint can be used to enforce this workflow through the feasibility analysis process. Next, the project manager can go through any other necessary processes to build the Project Charter. These processes may also require approval or they may not. Either way, the processes can be managed by Microsoft SharePoint regardless of the tools or file types involved since SharePoint can act on data based on the container in which it is placed instead of simply the data type.

Once the Project Charter is created and approved by the sponsor, the project manager can create a SharePoint site for use by the project team and the project can be launched. This SharePoint Site can be used to store beta documents early in the planning phase and final planning documents as well.

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## PLANNING WITH SHAREPOINT

The Planning process group may include the following processes:

- Assemble the project team
- Create a Work Breakdown Structure (WBS)
- Perform risk analysis
- Create the final budget and schedule

While other processes may be performed, these core processes should always be performed. In this whitepaper, the focus will be on assembling the project team and creating the WBS.

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## ASSEMBLING THE PROJECT TEAM

Getting the right team members on the team is crucial to project success. Organizations may use Microsoft SharePoint in at least two ways to help build the project team and launch the project.

- **Create a team selection SharePoint site.** A team selection site can be as simple as a list of potential team members and their abilities and availabilities. It can be as complex as a custom application that allows for resource request, approval and assignment.
- **Add team members to the SharePoint project site.** Once the team members are selected, the project manager can add them to the SharePoint project site so they can read documents, view tasks and calendars, and submit data for processing.

In addition to these examples, you may consider using Microsoft SharePoint for several other team building and team management processes, including:

- Team discussion forums
- Individual team member blogs
- Project manager blog
- General team communications
- Polls and surveys

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## CREATING THE WBS

Creating a WBS can often be a highly collaborative process. Since the project manager may not know everything that's involved in completing the required tasks. Using Microsoft SharePoint for collaboration on the WBS document can save time and reduce the need for group meetings. Instead of requiring everyone to attend a meeting at the same time, the project manager can submit a high level WBS to the SharePoint project site and task the various task managers with filling in the details. Then, in the end, a meeting can be held to cover the final WBS and get last minute input.

The final WBS can be submitted to the project site and used as a guide for the other processes in the planning phase. Once the other documents have been created, the project manager can collect the information into a single document or let them stand alone as the project plan.

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## EXECUTION WITH SHAREPOINT

The Execution of a project includes the following processes:

- Work authorization
- Vendor contract management
- Schedule and administer meetings
- Implement the communicate plan

By now, you can probably guess how SharePoint sites can be used to facilitate these processes. You can store documents in a library – one for each task group. When the task group should begin, you can submit the appropriate document to a workflow process, which results in the notification of the task manager.

Vendor contracts can be stored in a SharePoint document library and can also be assigned to a workflow. Meetings can be scheduled in a SharePoint calendar and the meeting entry can be linked to an Agenda document. Many organizations will notify the project manager if any team member has not checked out the Agenda document before the meeting.

Finally, the communications plan can be stored in SharePoint and, potentially, executed through SharePoint.

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## MONITOR AND CONTROL WITH SHAREPOINT

The Monitor and Control phase includes processes like:

- Quality control
- Scope management
- Budget/cost control
- Schedule management
- Incident handling or risk management

Depending on the level of delegation used, the project manager may allow team members to update the project documents directly. The SharePoint administrator can implement a workflow process that updates the administrator anytime a document is changed. This configuration automates the monitoring process, which helps the project manager maintain control.

Additional measures can be taken, but the key benefit of Microsoft SharePoint in relation to monitoring and controlling the projects, is automatic notification of events and simplified management of incidents.

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## CLOSURE WITH SHAREPOINT

Project closure includes auditing the project, lessons learned analysis, closing contracts and ensuring scope completion. Once these processes are completed, the project should be archived for future analysis by project managers. When Microsoft SharePoint is used to manage all of the information related to the project, document archival can be as simple as backing up the project site and restoring it to an archival SharePoint server or the organization may simply choose to leave the files in the existing site.

Additionally, closure may require yet another workflow process. The project manager can update all documents and indicate that the project is complete. At this point, the sponsor is notified and reviews the documents. If everything meets the sponsor's approval, he or she can indicate that the project is complete and the project site can be updated to reflect the same.

## MICROSOFT PROJECT INTEGRATION

Up to this point the concepts covered can be implemented using the built-in features of SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007. You can store any Microsoft Project document in a SharePoint library; however, an add-on available at <http://www.projectpublisher.com> allows you to fully integrate the project data in the Microsoft Project file with your SharePoint site. Project Publisher provides the following features:

- Publish task lists and assignments
- Update task status information through SharePoint
- Send a request for a task update from inside SharePoint
- View and track tasks and milestones
- Map resources to projects for team selection

If you use Microsoft Project to manage your projects and have Microsoft SharePoint installed, Project Publisher is a valuable add-on that automates much of what this whitepaper suggests.

## SUMMARY

This whitepaper presented the various ways in which Microsoft SharePoint may be used to facilitate project management based on the five PMI project process groups. While the information presented was conceptual, the steps required to implement them are covered in the ASPE course titled, *Utilizing SharePoint for Project Management*. The key facts include:

- SharePoint provides centralized document storage for collaboration and archival purposes.
- Workflows can be used to ensure that the project processes are completed according to organizational policies.
- Any project management application may be used.
- Microsoft Project integrates with SharePoint Services.