

BrightWork webinars

4 Easy Ways to Manage Your Project Schedule with SharePoint

presented by



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QUICK POLL

**Are You Using
SharePoint for Project
Management?**



BrightWork

Projects •
Portfolios •
SharePoint •

Start managing projects with best-practice templates and dashboards.

Evolve project management with one complete SharePoint solution.



BrightWork

Some of the companies we work with and have provided Project Management Solutions



amazon



Dimensional



Camden
NATIONAL BANK



SIEMENS
Healthineers



AMSURG



ASCEND
PERFORMANCE MATERIALS



Schneider
Electric



CHA
CHICAGO HOUSING
AUTHORITY

Agenda

- Create a **work breakdown structure** with a SharePoint task list.
- Calculate and update the timeline with the **In-browser Task Scheduler**.
- Track progress with the **Task Reports**.
- Use the **sync with MS Project** for complex schedules.

Before you develop your Project Plan

Gather Inputs from your team

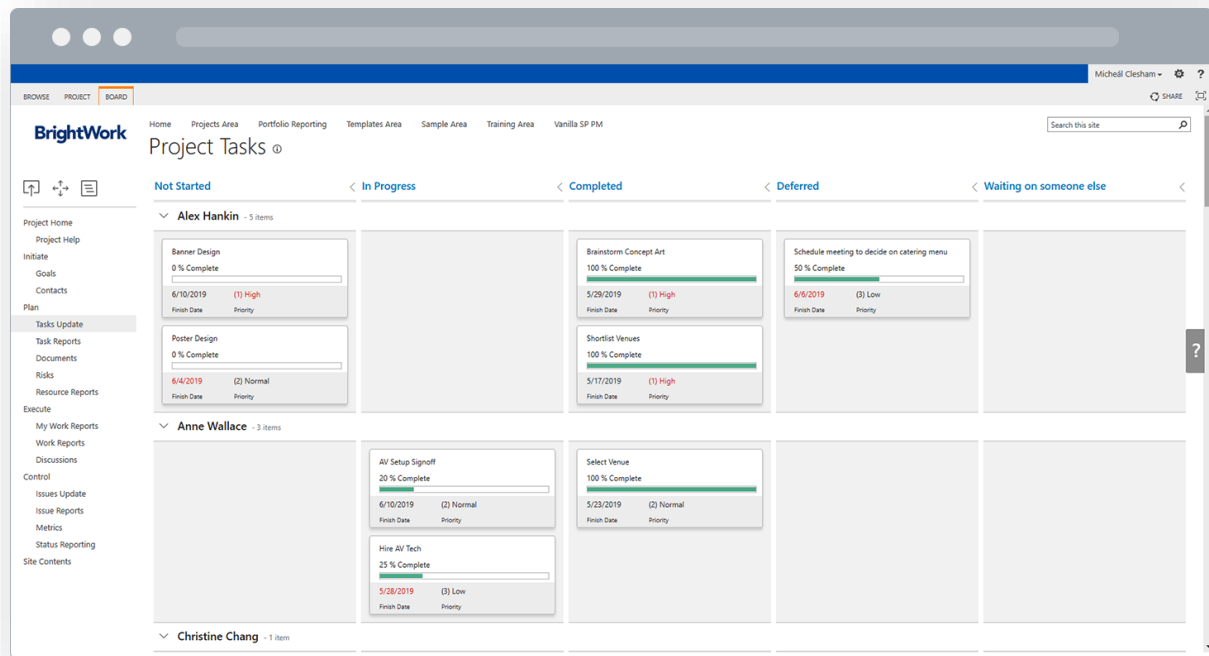
Refer to the project Statement to understand the scope and goals of the project, resources, stakeholder expectations, and proposed schedules.

Identify who is responsible for the deliverables, tasks and phases.

Plan milestones and stages

Having consulted your team you can plot key milestones and project phases.

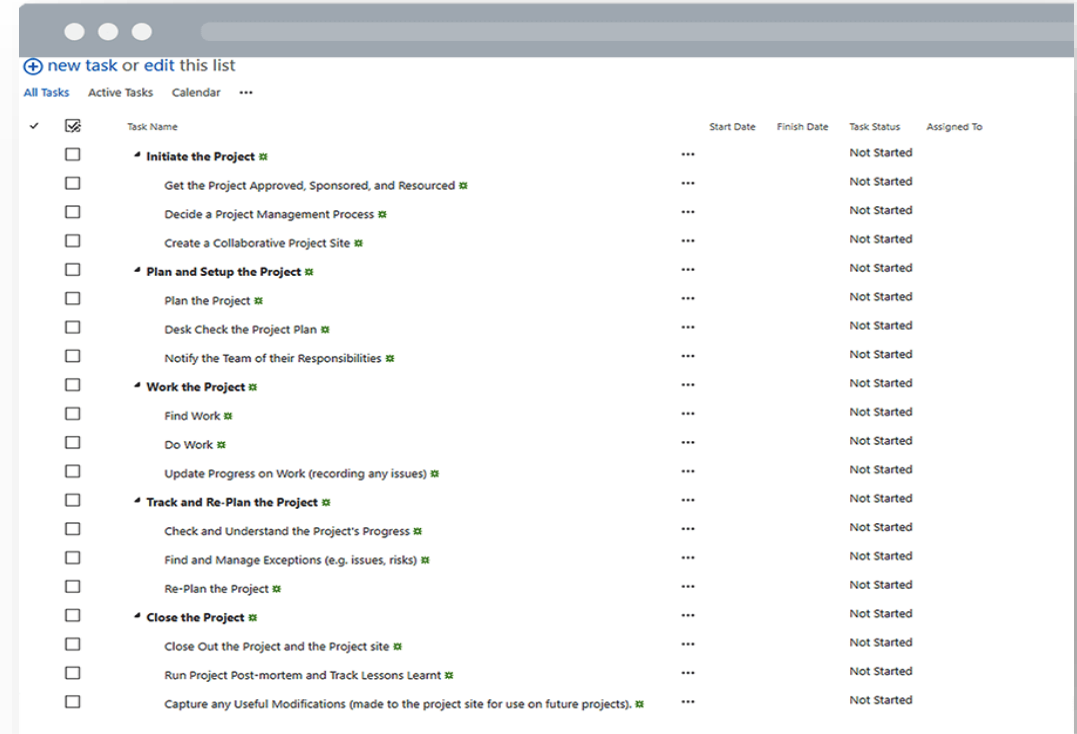
These can track your progress and keep your team motivated.



Managing the Work Breakdown Structure

Using the Out of the Box Web Part you can do the following:

- Add key information such as description, owner, start and finish date, status.
- Create sub-tasks.
- Add tasks and milestones to a timeline.
- Edit tasks individually or in bulk.
- View tasks on a Gantt chart.
- Use pre-built views such as Late Tasks and My Tasks.
- Sync tasks to Outlook.
- Set alerts on the list.
- Send email notifications to team members when they are assigned a task.



The screenshot displays a SharePoint task list web part titled "new task or edit this list". It features a navigation bar with "All Tasks", "Active Tasks", and "Calendar" views. The main content is a table with columns for "Task Name", "Start Date", "Finish Date", "Task Status", and "Assigned To". The tasks are organized into a hierarchical structure with expandable sections:

| Task Name | Start Date | Finish Date | Task Status | Assigned To |
|--|------------|-------------|-------------|-------------|
| Initiate the Project | ... | ... | Not Started | |
| Get the Project Approved, Sponsored, and Resourced | ... | ... | Not Started | |
| Decide a Project Management Process | ... | ... | Not Started | |
| Create a Collaborative Project Site | ... | ... | Not Started | |
| Plan and Setup the Project | ... | ... | Not Started | |
| Plan the Project | ... | ... | Not Started | |
| Desk Check the Project Plan | ... | ... | Not Started | |
| Notify the Team of their Responsibilities | ... | ... | Not Started | |
| Work the Project | ... | ... | Not Started | |
| Find Work | ... | ... | Not Started | |
| Do Work | ... | ... | Not Started | |
| Update Progress on Work (recording any issues) | ... | ... | Not Started | |
| Track and Re-Plan the Project | ... | ... | Not Started | |
| Check and Understand the Project's Progress | ... | ... | Not Started | |
| Find and Manage Exceptions (e.g. issues, risks) | ... | ... | Not Started | |
| Re-Plan the Project | ... | ... | Not Started | |
| Close the Project | ... | ... | Not Started | |
| Close Out the Project and the Project site | ... | ... | Not Started | |
| Run Project Post-mortem and Track Lessons Learnt | ... | ... | Not Started | |
| Capture any Useful Modifications (made to the project site for use on future projects) | ... | ... | Not Started | |

Common Scheduling Mistakes

Ensuring all items are present

In order for the scheduler to work you must have 3 items present in your task list – Task Name, Duration, and Predecessors

Not calculating the schedule

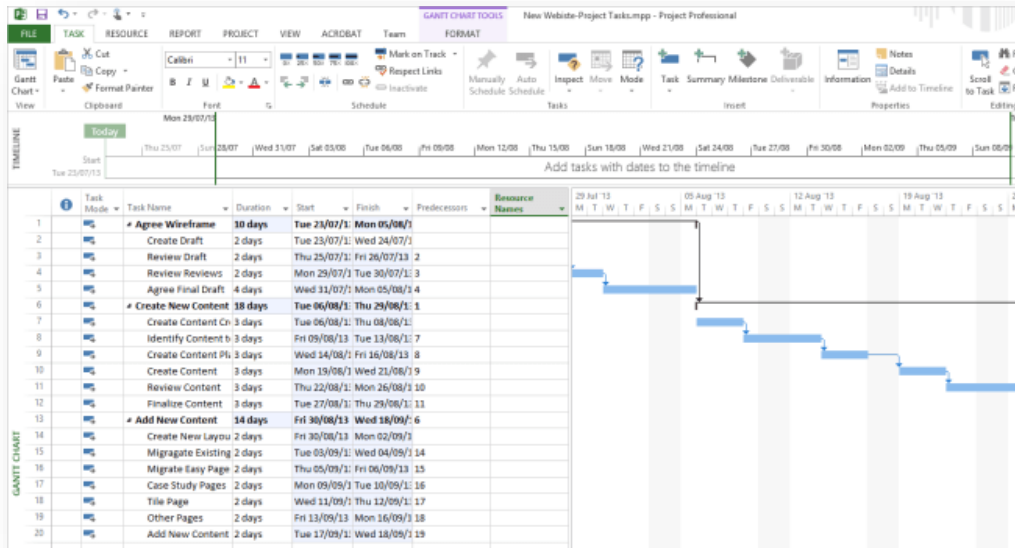
Once the schedule is added, the Project Manager can forget to ‘*Calculate Schedule*’ to see the task dates waterfall down the schedule

Change *duration*, not end dates

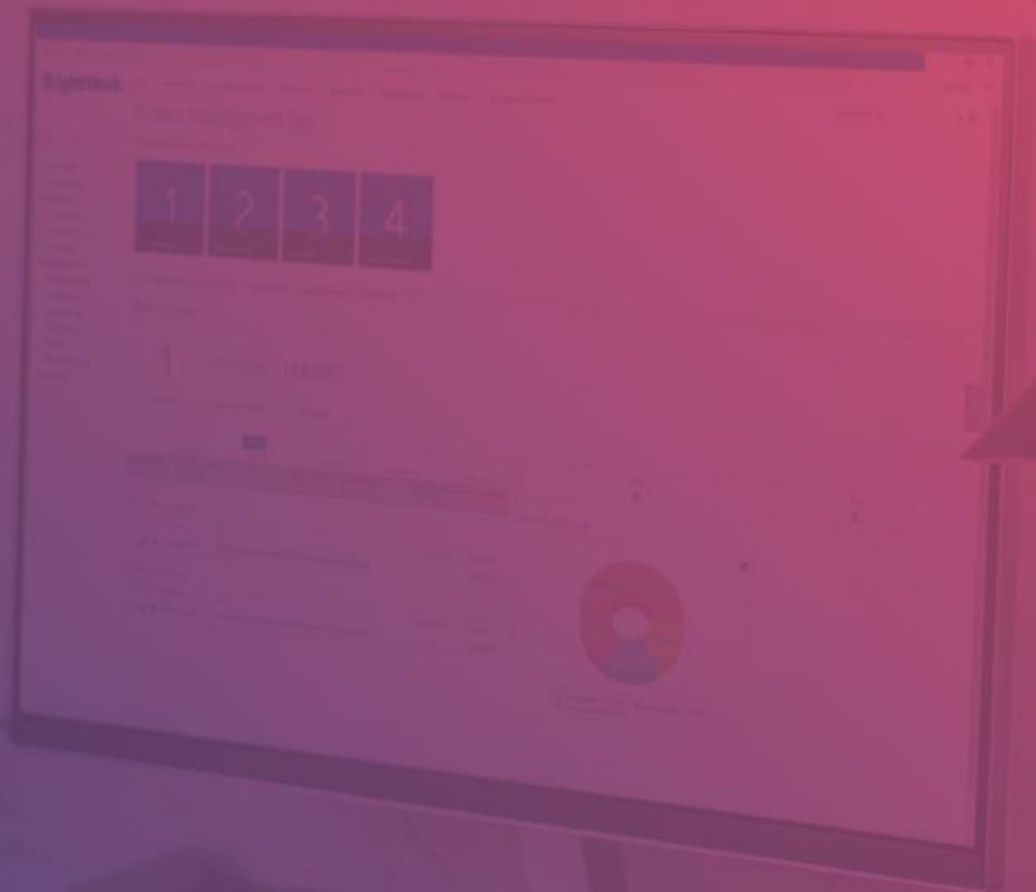
When schedule has been initially set up and dates are entered if a change needs to be made to a date use the Duration to move out the tasks instead of just entering the date. When the timer runs nightly it will re-calculate your schedule and you will lose your manually entered date.

Microsoft Project

Make sure you are launching MS Project from BrightWork. Our schedule is in a library on the site so it will publish to the correct Task List and also has the macros needed to make it work properly.



DEMO



QUESTIONS?

➤ Use the Question pane in GoToWebinar to ask questions

THANK YOU

➤ Talk to our Solution Specialists about your project management needs



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APPENDIX

↘ BrightWork model explained

PROJECTS

Start with Standardized Project Management Templates

BrightWork includes a range project management templates that help you get projects started the right way every time, with the right amount of project management for the project and team in question.

Increase productivity by centralizing all project information into a single, cohesive tool.

The screenshot displays the BrightWork project management interface for a project titled "SharePoint Hyper-V Deployment (PL)". The interface includes a navigation menu on the left with categories like "Project Home", "Execute & Control", and "My Work Reports". The main content area features a "Get started with your project" section with four numbered steps: 1. Setup Project, 2. Set Initial Dates, 3. Add Tasks, and 4. Add Documents. Below this is a "Key Project Metrics" section with three cards: "Late Items" (6), "Current Finish Date" (12/25/2015), and "Last Change" (8/27/2018). A timeline view shows the project schedule from February 2019 to April 2019. The "Top Open Issues" section lists three issues, with the top one being "Project time lines impacted by Resource Re-organization" due on 12/14/2015. The "Overdue Items" section lists three overdue tasks, including "Install OS with Hyper-V" due on 12/8/2015. A "Tasks By Status" donut chart shows the distribution of tasks: Not Started (red), In Progress (green), and Completed (yellow). The interface also includes a search bar and a user profile for "Michaél Cleham".

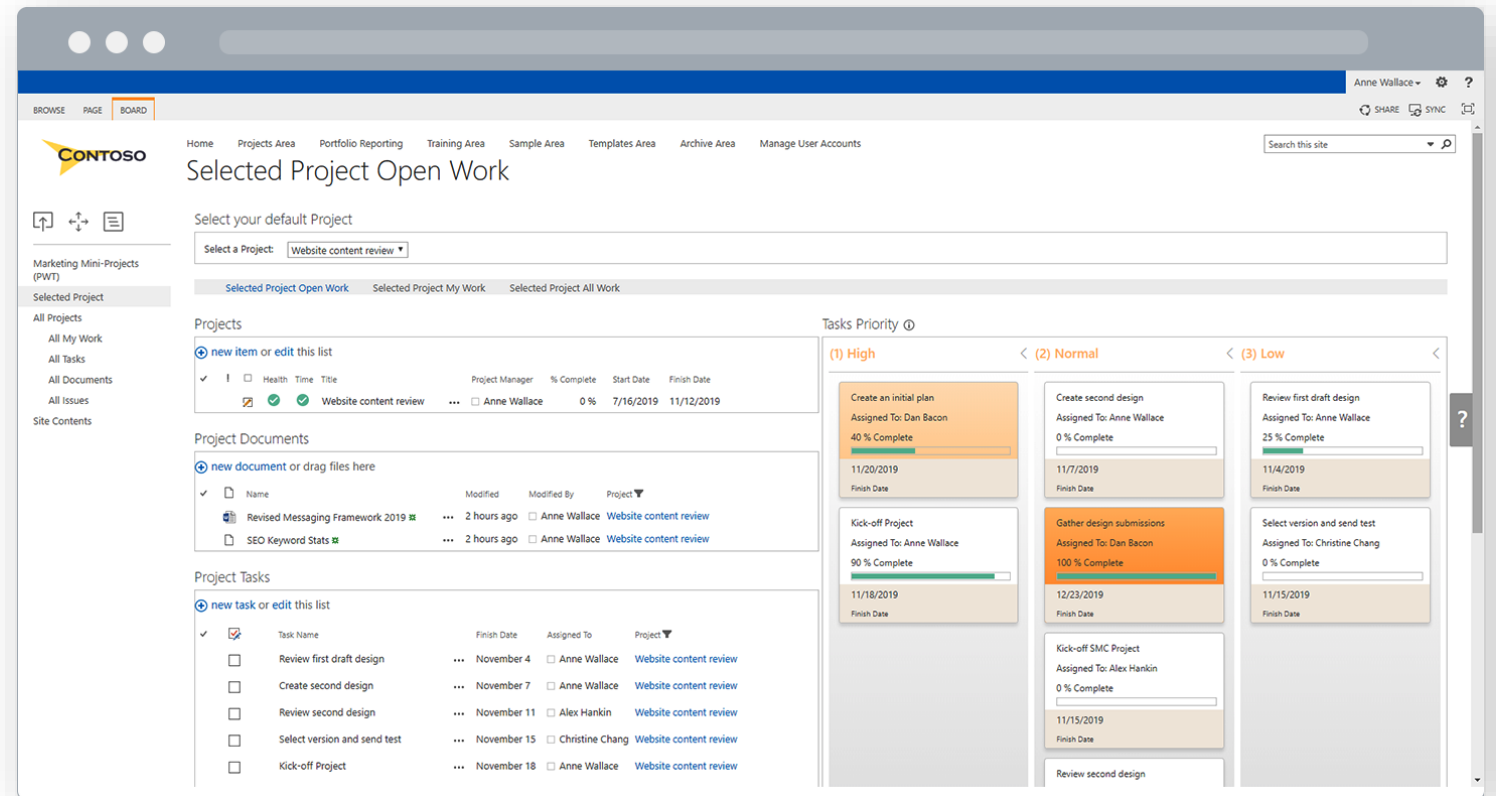
PROJECTS

Collaborate with a Team-focused Project Site

Team members can find, do and report on their work in a team-focused project site with BrightWork.

Manage your schedule with instant visibility into project and non-project tasks.

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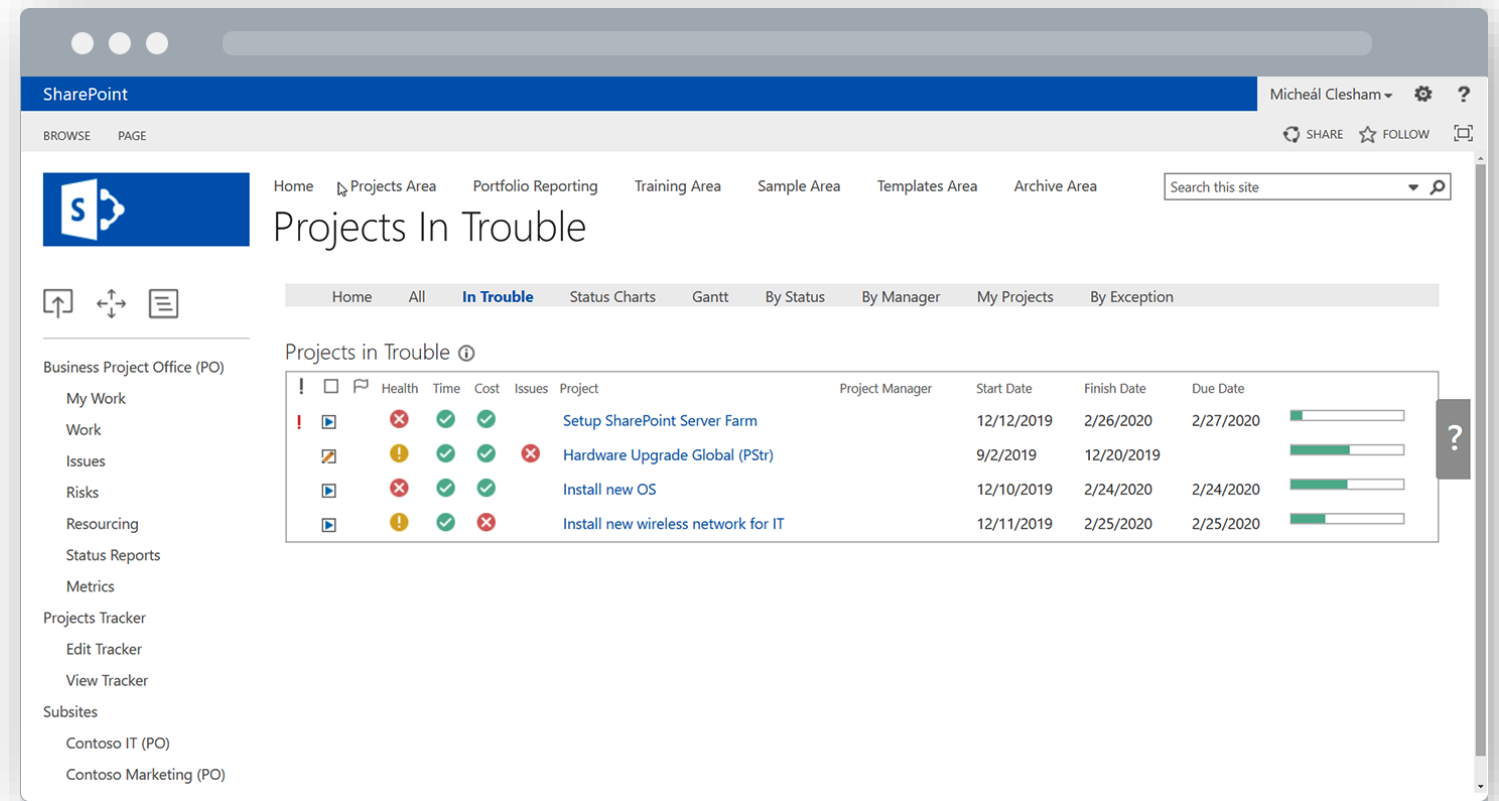


PROJECTS

Track and Share Progress with Automated Reports

Project Managers spend too much time on administration instead of the project itself!

BrightWork templates come with automated reporting and dashboards to provide project visibility to the people who need it.

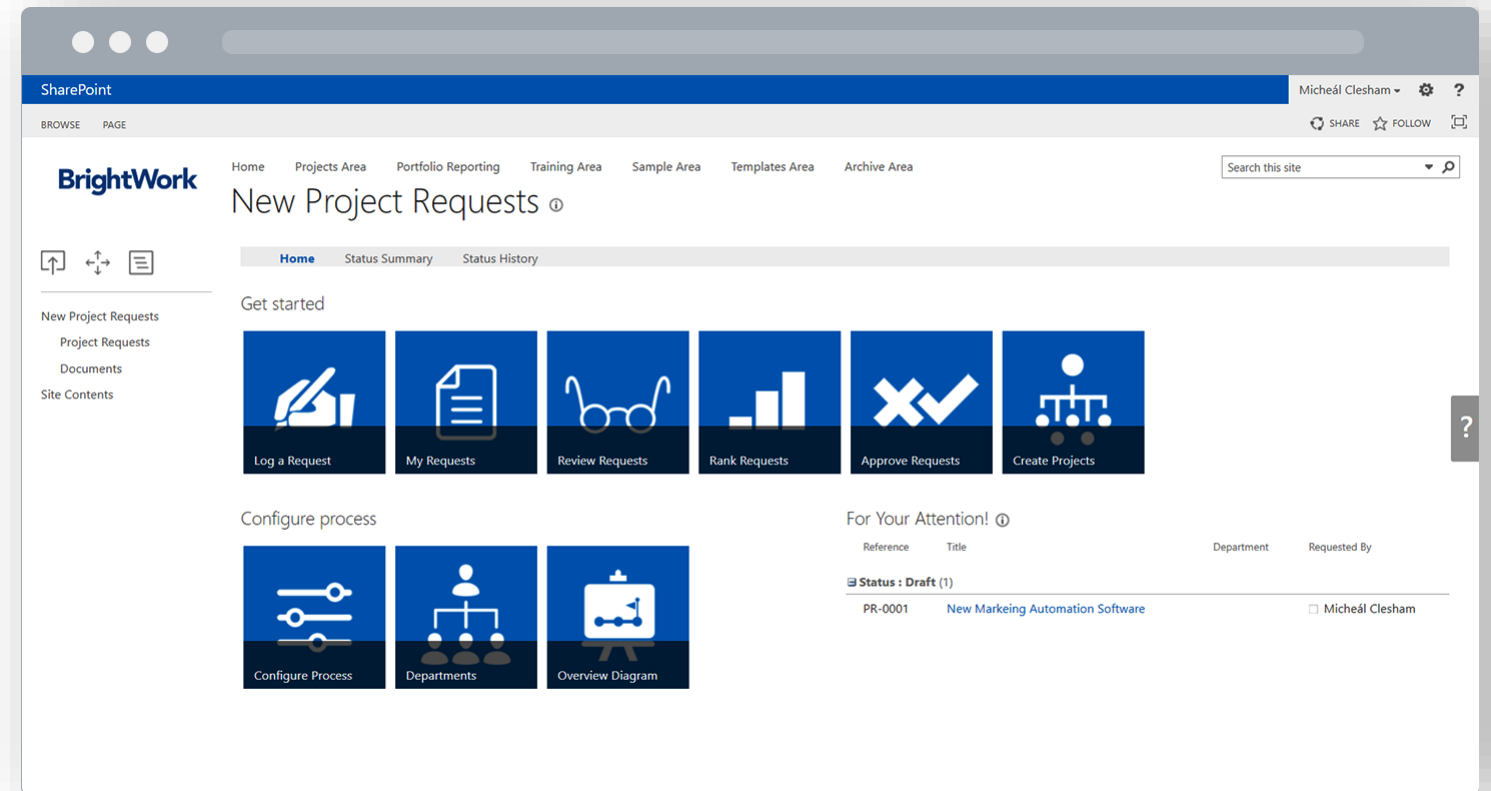


PORTFOLIOS

Approve with Scalable Project Request Management

BrightWork gives you a simple process for deciding which projects get approved and automatically creates the new project site.

Develop a transparent ranking process to ensure alignment with business objectives

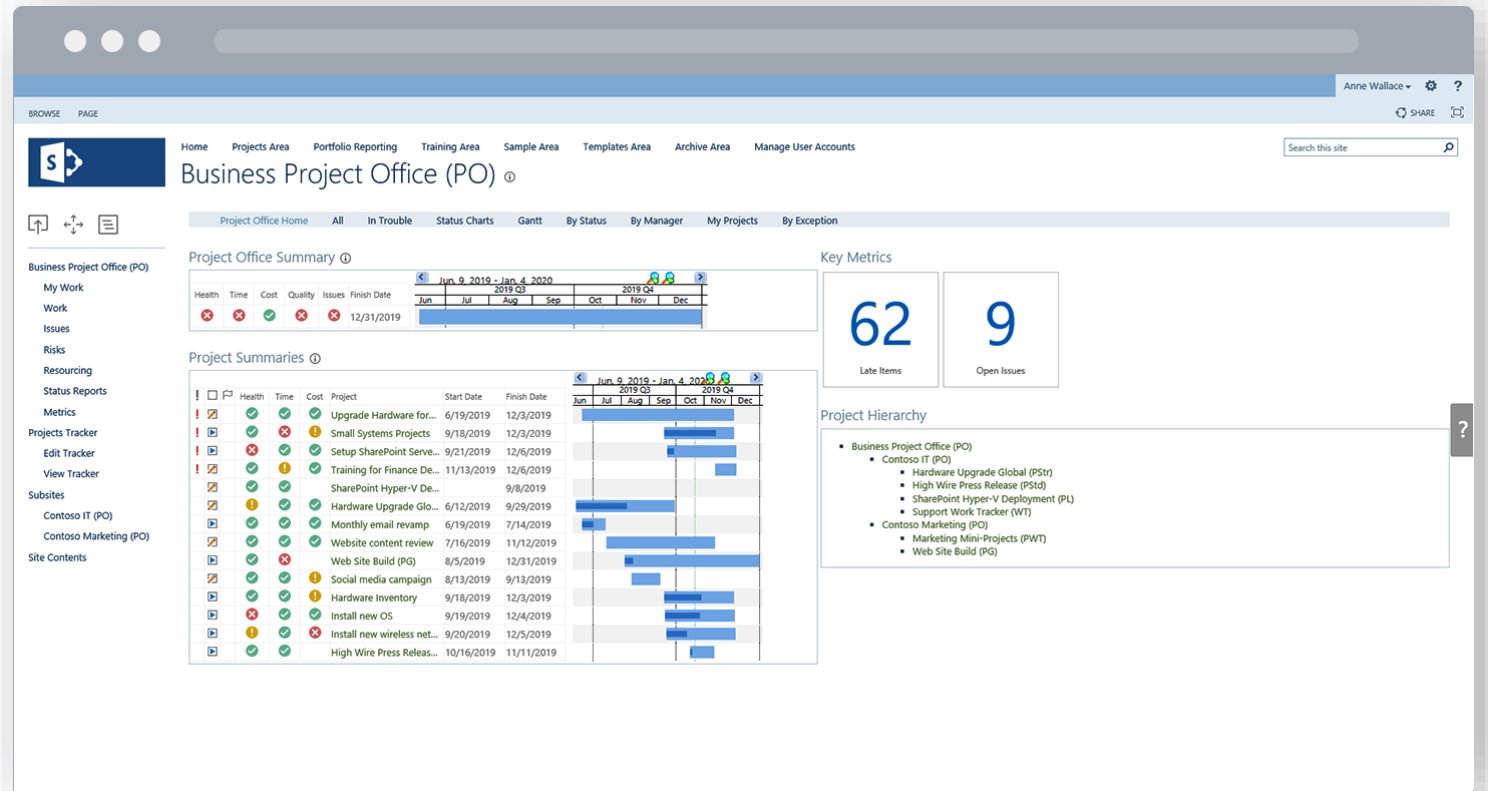


PORTFOLIOS

Track with Real-Time Portfolio Dashboards

BrightWork reporting dashboards allow you to quickly track the health and progress of all projects across the organization.

Get visibility and drill into the detail of specific projects.



PORTFOLIOS

Allocate with High-Visibility Resource Management

Simple resource reports help you track and forecast resource allocation to make sure you have optimal resource utilization across projects.

Prevent burnout and boost team morale with more transparency around workloads and commitments.

The screenshot displays the BrightWork Resource Management dashboard. The interface includes a navigation menu with options like Home, Projects Area, Portfolio Reporting, and a search bar. The main content area features two interactive cards: 'Resource Allocation' and 'Overview Diagram'. Below these is a 'Resource Report' table with columns for Title, Start Date, Finish Date, Work, and quarterly data for 2019 (Q2, Q3, Q4).

| Title | Start Date | Finish Date | Work | Q2, 2019 | | Q3, 2019 | | Q4, 2019 |
|-----------------------------------|------------|-------------|------|----------|----------|----------|----------|----------|
| | | | | Jun/2019 | Jul/2019 | Aug/2019 | Sep/2019 | Oct/2019 |
| Assigned To : Anne Wallace (1) | | | | 80.00 | 184.00 | 176.00 | 168.00 | 40.00 |
| Assigned To : Christine Chang (1) | | | | 40.00 | 92.00 | 88.00 | 84.00 | 20.00 |
| Assigned To : Jim Corbin (1) | | | | 80.00 | 184.00 | 176.00 | 120.00 | |

SHAREPOINT

Deploy with a Low IT Burden

As BrightWork is built on the industry SharePoint platform, organizations can leverage existing and investments in infrastructure and training.

Reduce the learning curve and accelerate user adoption with a familiar environment.

The screenshot displays the BrightWork Resource Management interface. The top navigation bar includes 'Home', 'Projects Area', 'Portfolio Reporting', 'Templates Area', 'Sample Area', 'Training Area', and 'Vanilla SP PM'. A search bar is located on the right. The left-hand navigation pane lists 'Requests Home', 'Project Requests', 'Documents', 'Resource Management', 'Resource Allocation', and 'Site Contents'. The main content area features a sub-navigation bar with 'Home', 'Status Summary', 'Status History', and 'Resource Management'. Below this are two icons: 'Resource Allocation' and 'Overview Diagram'. A 'Resource Report' table is shown, detailing work hours for three users: Anne Wallace, Christine Chang, and Jim Corbin, across five months from June 2019 to October 2019.

| | Title | Start Date | Finish Date | Work | Q2, 2019 | | Q3, 2019 | | Q4, 2019 |
|--------------------------|--|------------|-------------|------|----------|----------|----------|----------|----------|
| | | | | | Jun/2019 | Jul/2019 | Aug/2019 | Sep/2019 | Oct/2019 |
| <input type="checkbox"/> | Assigned To : <input type="checkbox"/> Anne Wallace (1) | | | | 80.00 | 184.00 | 176.00 | 168.00 | 40.00 |
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SHAREPOINT

Start with local, best-practice templates and BrightWork Assistance.

Taking a template based approach to projects makes it easy to improve project standards.

Reduce resistance to change with training resources for new project managers and team members.

The screenshot shows a SharePoint project dashboard for 'High-Wire Press Release'. The interface includes a navigation menu on the left with categories like 'Initiate', 'Plan', 'Execute', and 'Control'. The main content area features a Gantt chart showing task dependencies and dates from October 20 to November 9. Below the Gantt chart are several key metrics: 6 Late Items, Current Finish Date 11/11/2019, Last Change 10/18/2019, 5% Complete, and 19 Duration (days). There are also sections for 'Top Open Issues' and 'Overdue Items', both listing project issues with titles like 'Team Training not up to date' and 'Office costs are falling, should we wait longer?'. A 'Tasks By Status' donut chart shows 1 task in progress (9%) and 10 tasks not started (91%).

SHAREPOINT

Evolve with Easy-To-Configure Templates

Easily create, use, reuse, and update your project management best-practices on an organizational scale.

Expand BrightWork into new teams and departments without any impact on performance or reporting.

Evolve to the desired level of organizational project management quickly and easily.

