

Running Effective Projects in Office 365

September 10, 2015



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more



Peter Carson

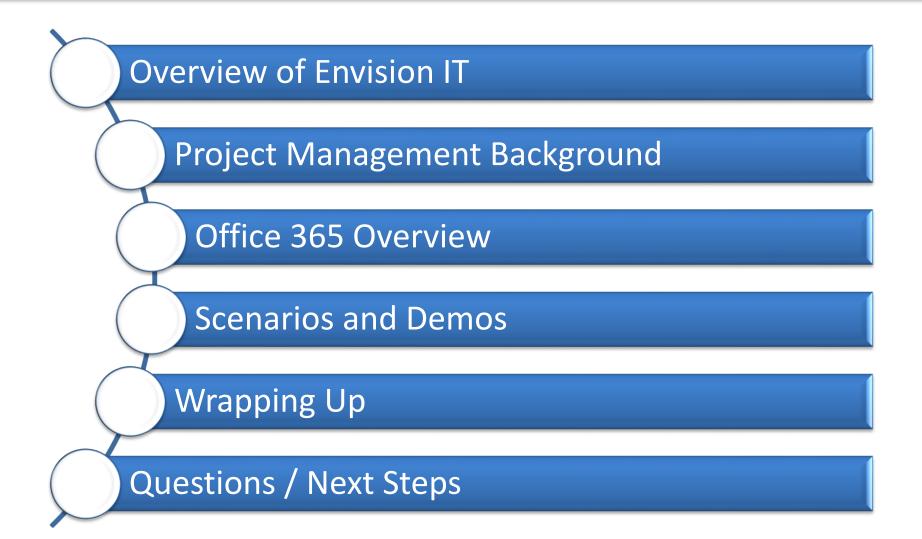


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Agenda





Envision IT Overview

- O365 Productivity Consultants
- Go-to partner for SharePoint Websites, Intranets, Extranets, and Collaboration portals
- 14 years of SharePoint experience
- Microsoft Gold Partner
- Multiple award winner





Services

Public Websites

Intranets

Extranets

Collaboration Portals

SP Farm Health Check

O365 & Azure Cloud Services

AODA Compliance

Upgrades & Migrations

Training

Mobile first adaptive design

Support Agreements

Solution Architecture

Workflows and Forms

Project Management Background

Project Measures

- On time and on budget
- Return on investment
- Aligned with strategic goals and objectives
- Quality
- Business Value



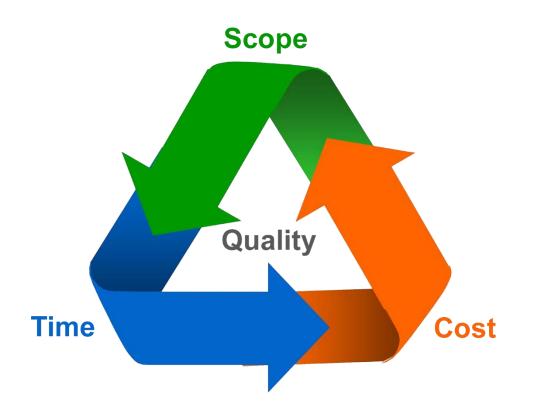
10 Rules of Highly Successful Project Management

- 1. Be Agile
- 2. Do Not Micromanage
- 3. Keep Improving Your Project Management Practice
- 4. Ongoing Planning
- 5. Work with a Sense of Urgency

- Visualize and Communicate all Project Deliverables and Activities
- 7. Complete Deliverables Step-by-Step
- 8. Healthy Risk Management
- 9. Open Communication
- 10. Never Lose Sight of the 3-Factors: Time, Budget, and Quality

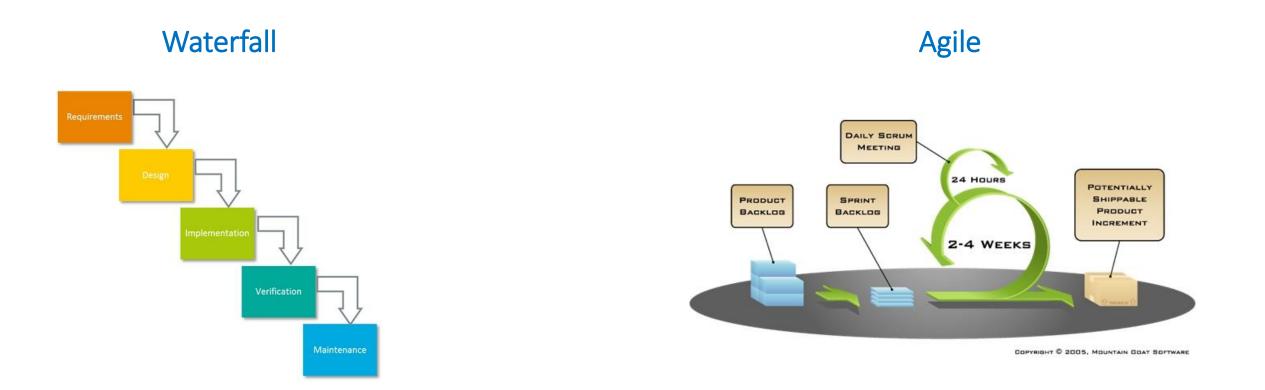
https://www.projectsmart.co.uk/10-rules-of-highly-successful-project-management.php

Project Management Triangle



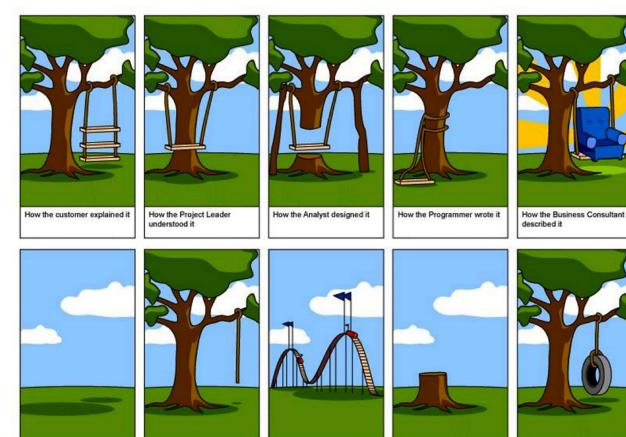
- Scope, time, and cost are interrelated
- Not possible to optimize all three

Methodologies



Hybrid combining elements of both

Communications



What operations installed

How the project was documented

How the customer was billed

How it was supported

What the customer really

needed

- Effective communications are key
- Both to the team and stakeholders

Communication Methods

Traditional

- In Person Meetings
- Phone calls
- Email
- Documents
 - Word, Excel, PowerPoint

Newer

- Virtual Meetings
- Instant Message
- Enterprise Social
- Portals

Office 365 Overview Which version of SharePoint are you currently using?

- Office 365
- SharePoint Server 2013
- SharePoint Server 2010
- SharePoint Foundation (2010 or 2013)
- MOSS 2007 or WSS 3.0



Office 365





- Suite of desktop, mobile and browser based productivity tools
- Windows, Mac, iOS, and Android support
- Supports all the major browsers

www.envisionit.com/Events/Webinar-2015-06-11-Office-365-The-Future-is-Now

Exchange Online





- Microsoft hosted email, calendars, and contacts
- Available on the web, in Outlook, and on mobile devices
- 50 GB mailbox

Skype for Business

Skype for Business

- Presence
- Instant messaging
- Audio and video calls
- Online meetings and sharing

Yammer



- Enterprise social network not Facebook
- Drives productivity through team collaboration
- Engages employees

OneDrive for Business



- 1 TB file storage for each user
- Sync files across all your devices for online and offline access
- Use search to find your files
- Share your files with colleagues and external users

SharePoint Online



- Communicate and collaborate
- Corporate Intranet
- Team Sites
- Forms and Workflows

Power BI



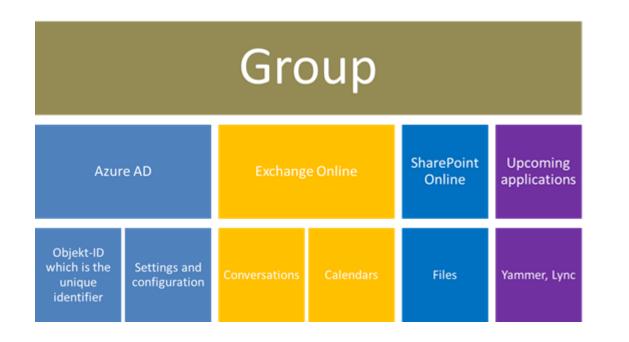
- Connect to data in Excel, corporate data sources, and external services
- Design your reports in Excel or Power BI Designer
- Publish them to the web
- <u>https://powerbi.microsoft.com</u>

Delve

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- Powered by the Office Graph
 - Collects signals of activities people are doing
- Drives information discovery through your connections to other people
- Machine intelligence
- Auto builds profile pages

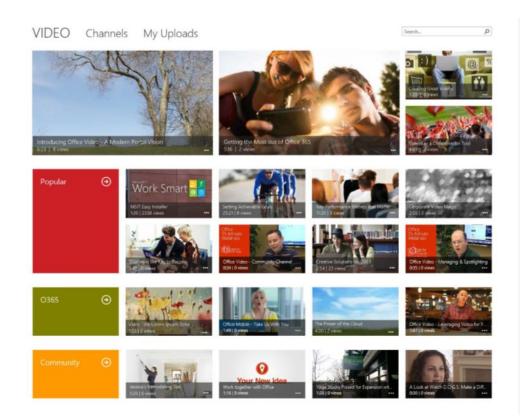
Office Groups



- Combines features from Exchange and SharePoint
 - Group calendar and mailbox
 - Library for document collaboration

Azure AD object under the hood

Office 365 Video



- Easily create channels in the video portal
- Drag and drop videos to convert them
 - Azure Media Services transcodes them into web format

OneNote

- OneNote is an electronic notebook on steroids
- Notebooks can be personal or shared
- Current features in O365 include
 - Co-creation/editing
 - Enhanced version control
 - Yammer context
 - Audit and reporting
 - Data Loss Prevention and eDiscovery (policies applied to OneDrive and SharePoint Online)



Scenarios and Demos

Team Sites

- Standard site template in SharePoint goes back to the beginnings in 2001
- Current template
 - Document library
 - Newsfeed
 - OneNote notebook
 - Wiki library
- Can be extended with additional lists and libraries
- SharePoint centric



Document Sets

- Folders with metadata
- Useful for simple projects
- Only deals with documents



Office 365 Groups

- Combines email and calendar from Exchange and documents from SharePoint
- Conversations are really email threads
 - These can include users external to the organization
- Calendars are true Exchange calendars
 - Can invite them to meetings through Outlook
- Documents only have version history
 - No metadata, approvals, records, etc.
- No additional SharePoint lists



Project Management Site Wish List

- Exchange email and calendar support
- OneNote for ad-hoc note taking
- Full SharePoint document libraries
- Custom lists
 - Tasks, Issues, Risks, Decisions
 - Top level Client and Project lists
- External systems
 - Financial, time tracking, bug tracking



Site Provisioning

- Shouldn't be a manual set of steps
- PowerShell is a great way to automate things
- Need a form to initiate the process
- Workflow for approval



Request Form

- Custom list
- Fields for Client and Project
 - Client may already exist, pick from a lookup
- Content approval is on



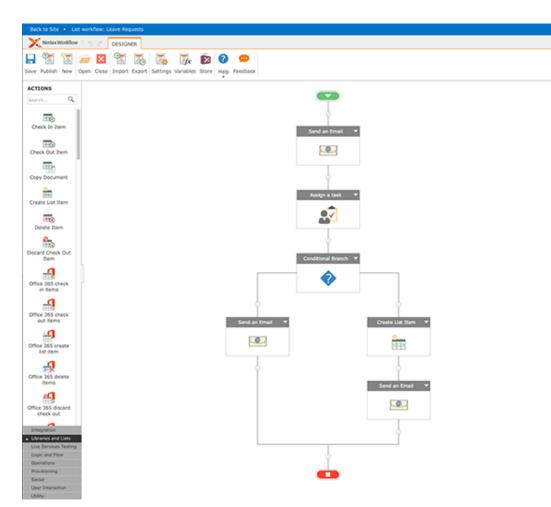
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- Quick and Easy Forms Designer
- Access Anywhere, Anytime
- Seamless Workflow Integration

http://www.nintex.com/workflow-platform/nintex-forms/forms-for-office-365

Nintex Workflow



- Create Office 365 Workflows with clicks, not code
- Build Workflows in minutes
- Connect to a range of cloud services
- Create enterprise workflows with out-of-the-box actions

http://www.nintex.com/workflow-platform/nintex-workflow/workflow-for-office-365

Wrapping Up

Wrapping Up

- Leverage the best of SharePoint Online and Exchange
- Create project portals unique to your requirements
- Leverage the full Microsoft productivity stack
 - Outlook for email and calendar
 - Co-authoring in Word, Excel, and PowerPoint
 - OneNote rocks
 - Skype for Business for IM, desktop sharing, voice, and video
 - Use Delve to discover knowledge and people
 - Power BI can display project analytics



Still to Come

Governance

- Defining roles and responsibilities
- Permissions
- External collaboration
 - External users can't be members of Office 365 Groups



Extranet User Manager

Extranet User Manag SharePoint Home Search Add Co	Er 👬	
Search	bbA	Configure
Groups Users	Group User Import Users Managed Domain SharePoint Site ezRealm IP Address ezRealm Email Redirect	System Settings Managed Domains SharePoint Sites General Email Settings Pending Approval Email Pending Approver Email Welcome Email Forgot Password Email ezRealm Settings
		Office 365 Configuration Deactivate and Delete Thinktecture Identity Server

- Easy delegation of user management to business
- Self-registration, approvals, forgotten password reset
- Simplified login for both internal and external users

Upcoming Session

External Collaboration with Office 365 Project Sites Webinar

- Wednesday September 16, 2015 | 1:30 2:30 PM EDT
 - Quick review of Projects in Office 365
 - Extending site creation workflow process
 - Automate creation of project groups
 - Inviting external users into site
 - Self-registration and approval workflow for new external users
 - Single sign-on for internal users, and secure authentication for external users
 - Private internal content vs. project content shared with the external users
 - Single sign-on to other project tools
 - <u>www.extranetusermanager.com/Events-and-News/Events/Webinar-2015-09-16-</u> <u>External-Collaboration-with-Office-365-Project-Sites</u>



Questions and Next steps

THANK YOU!