



Running Effective Projects in Office 365

September 10, 2015

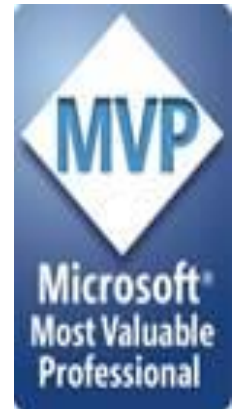


see more.

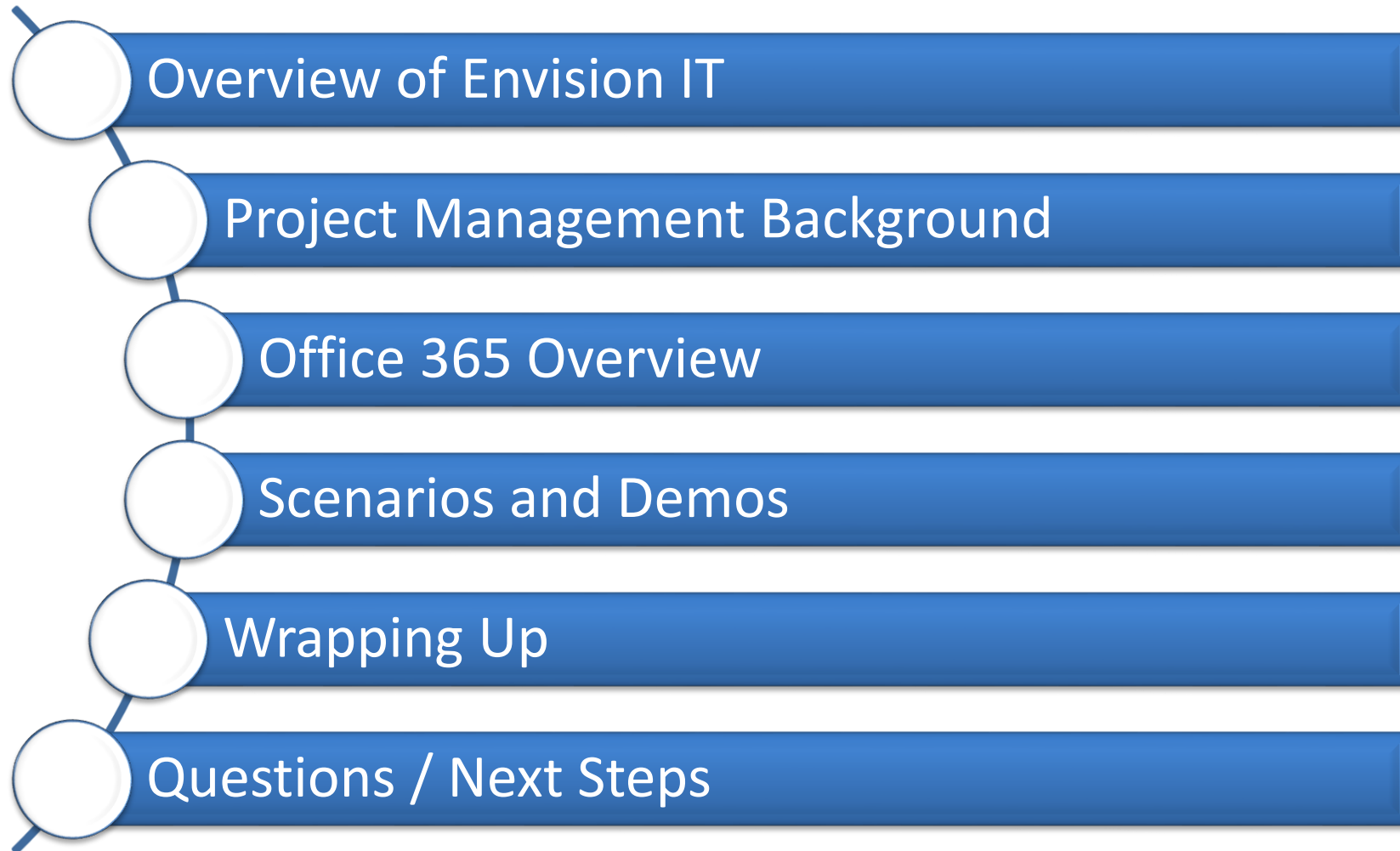
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- Twitter @carsonpeter
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Agenda



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

Microsoft Partner
Gold Collaboration and Content
Silver Application Development
Silver Cloud Platform



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

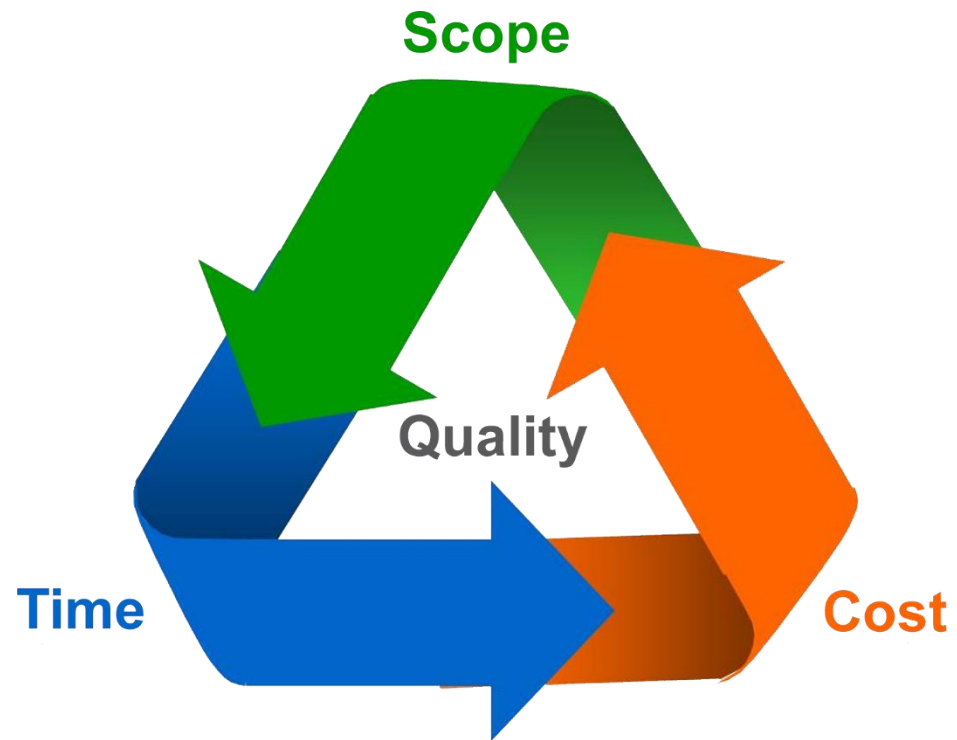
- On time and on budget
- Return on investment
- Aligned with strategic goals and objectives
- Quality
- Business Value

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
6. 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>

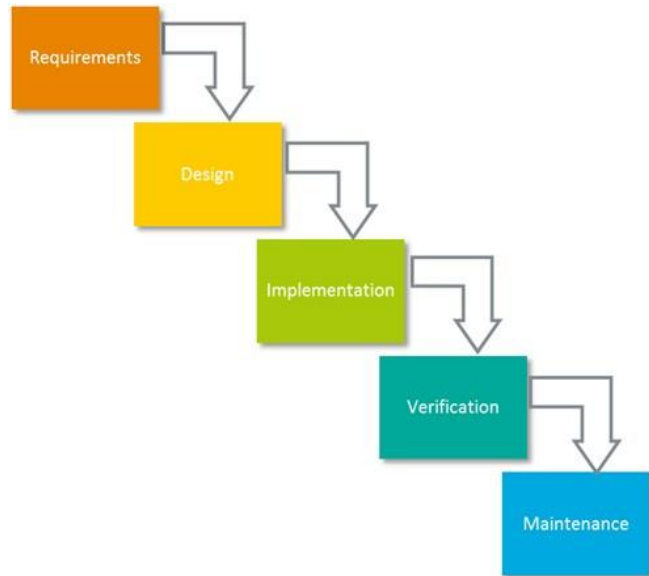
Project Management Triangle



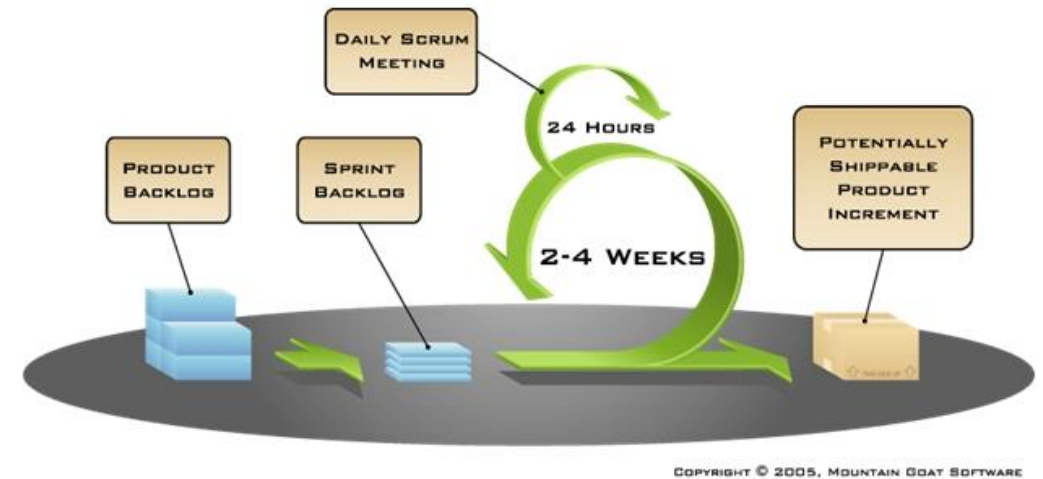
- Scope, time, and cost are interrelated
- Not possible to optimize all three

Methodologies

Waterfall



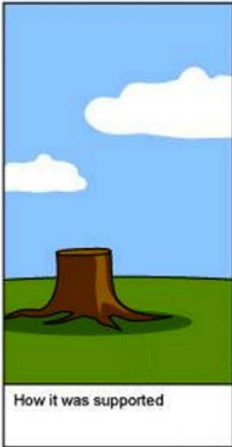
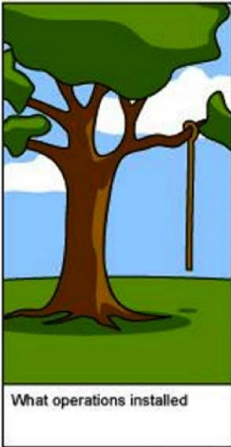
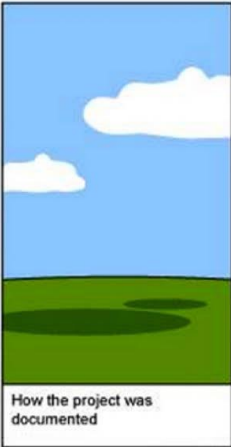
Agile



Hybrid combining elements of both

Communications

- 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

Poll 1

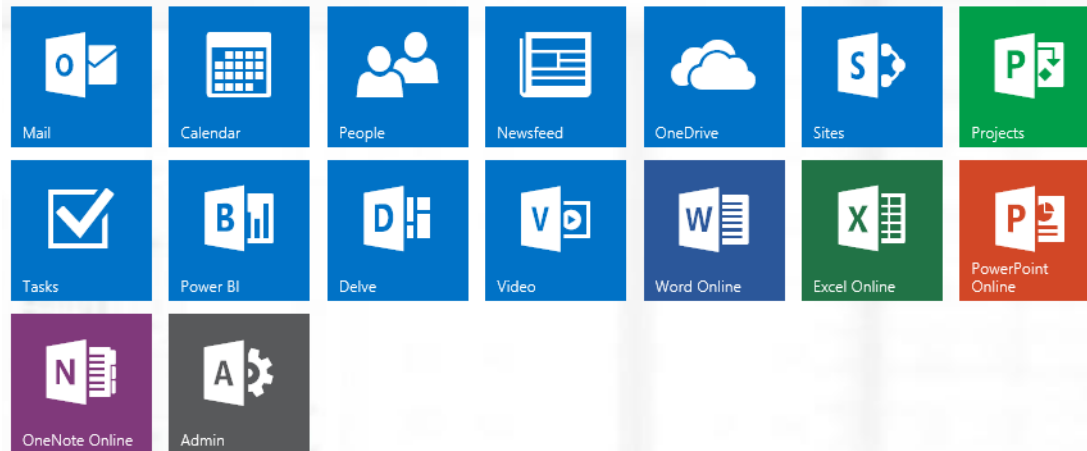
Which version of SharePoint are you currently using?

- 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

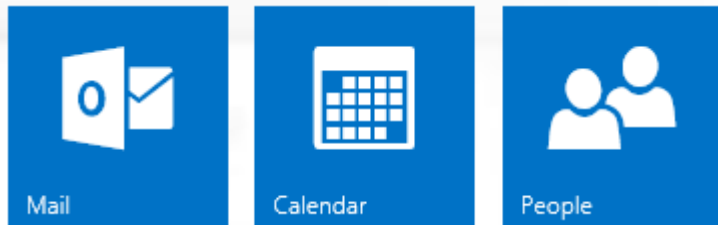


www.envisionit.com/Events/Webinar-2015-06-11-Office-365-The-Future-is-Now

Exchange Online



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



Skype for Business



- 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



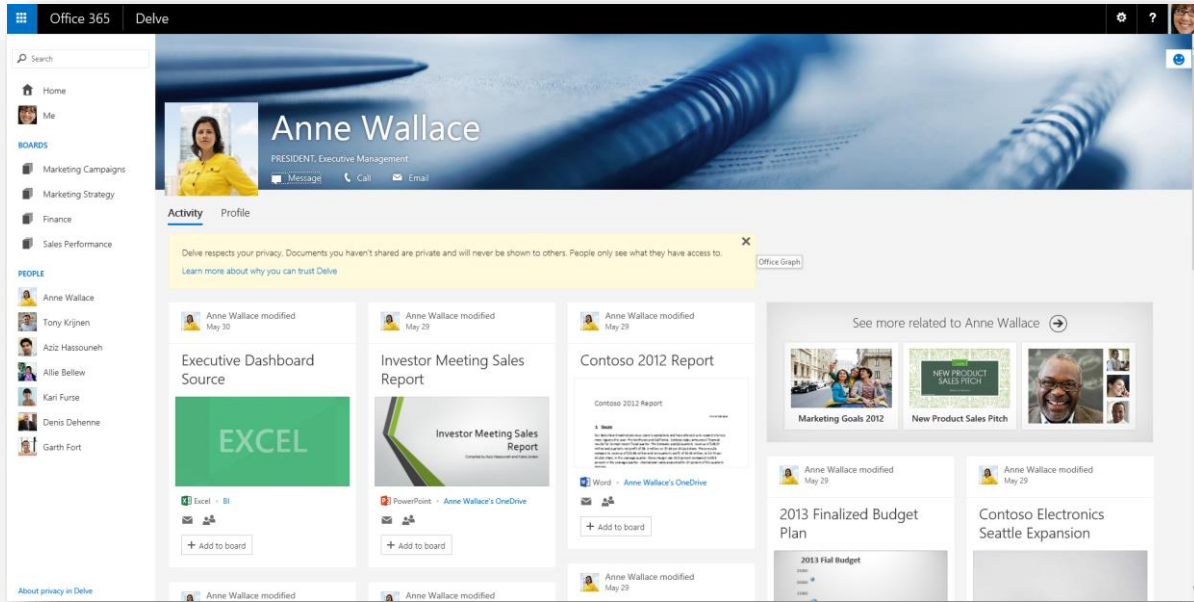
- Communicate and collaborate
- Corporate Intranet
- Team Sites
- Forms and Workflows

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
- <https://powerbi.microsoft.com>

Delve



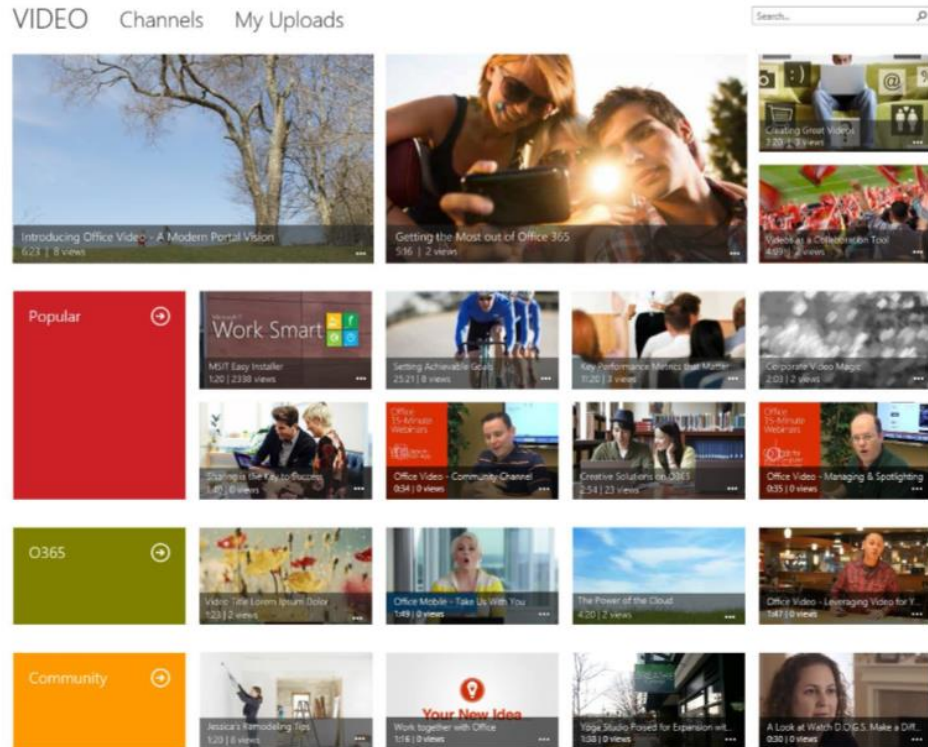
- Powered by the Office Graph
 - Collects signals of activities people are doing
- Drives information discovery through your connections to other people
- Machine intelligence
- Auto builds profile pages

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

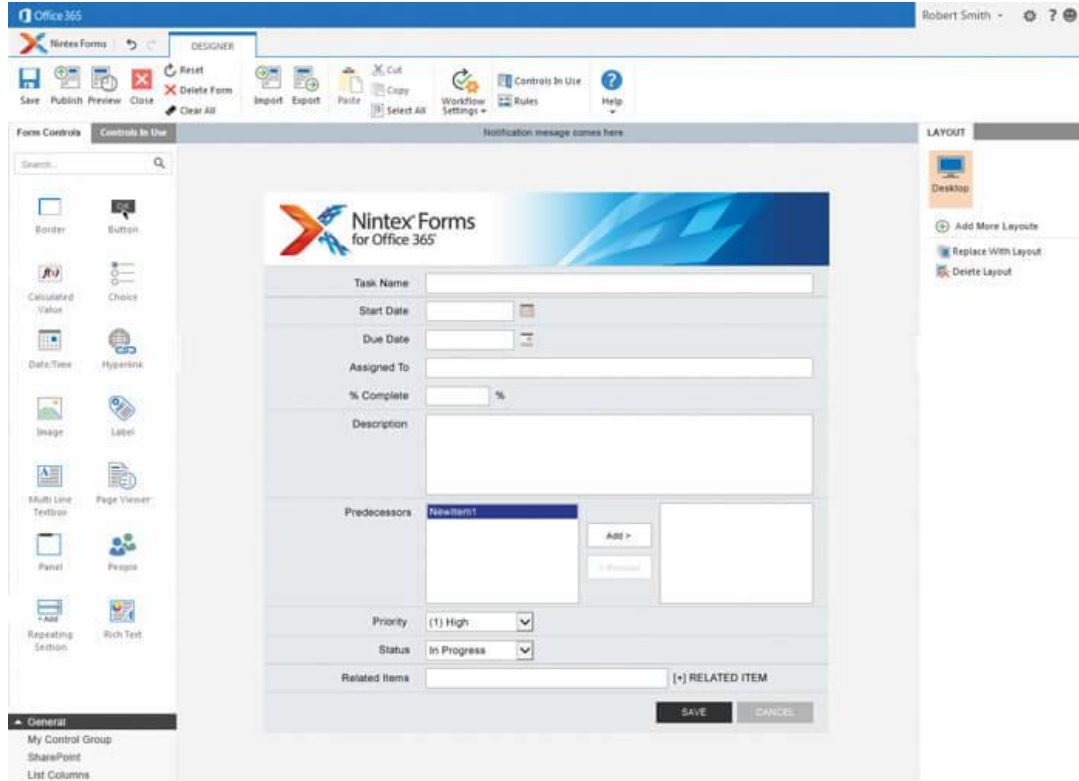
Site Provisioning

- 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

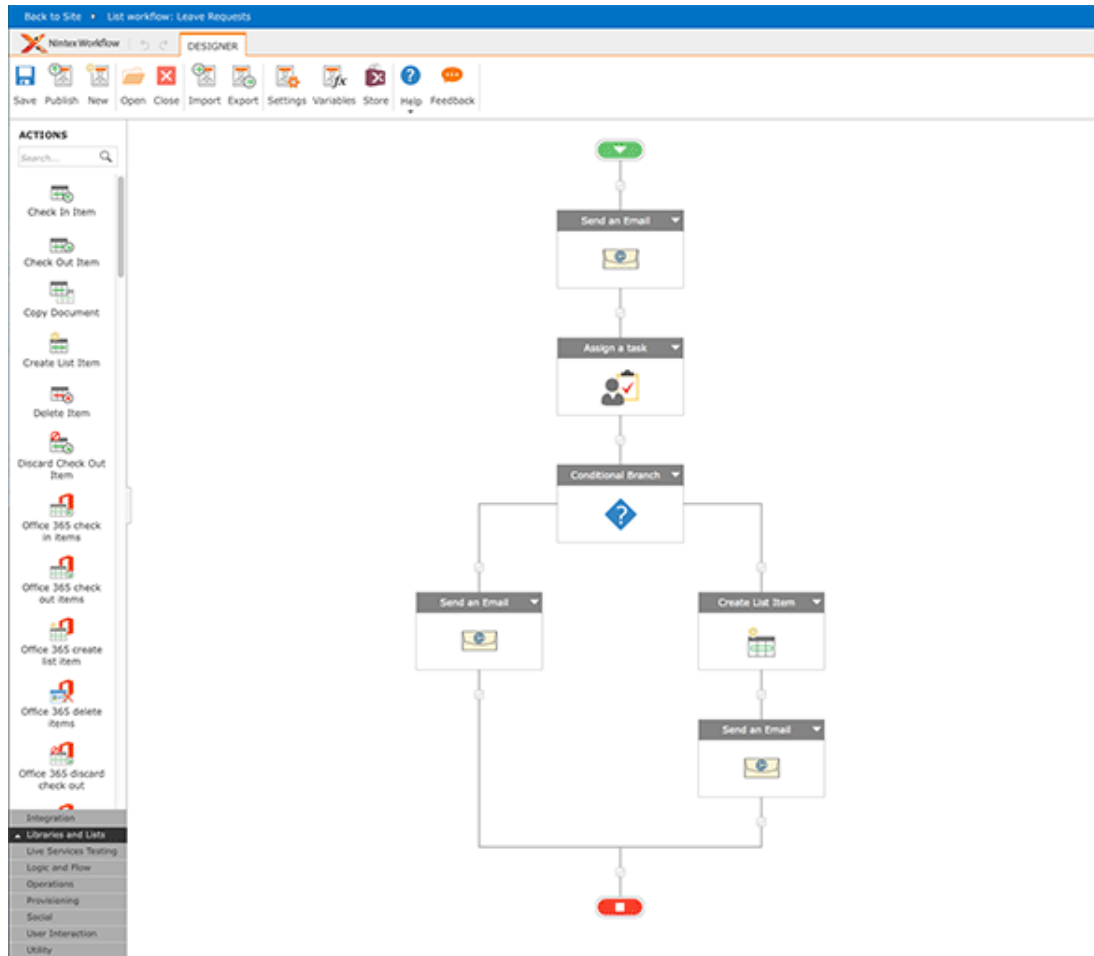
Nintex Forms



- 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

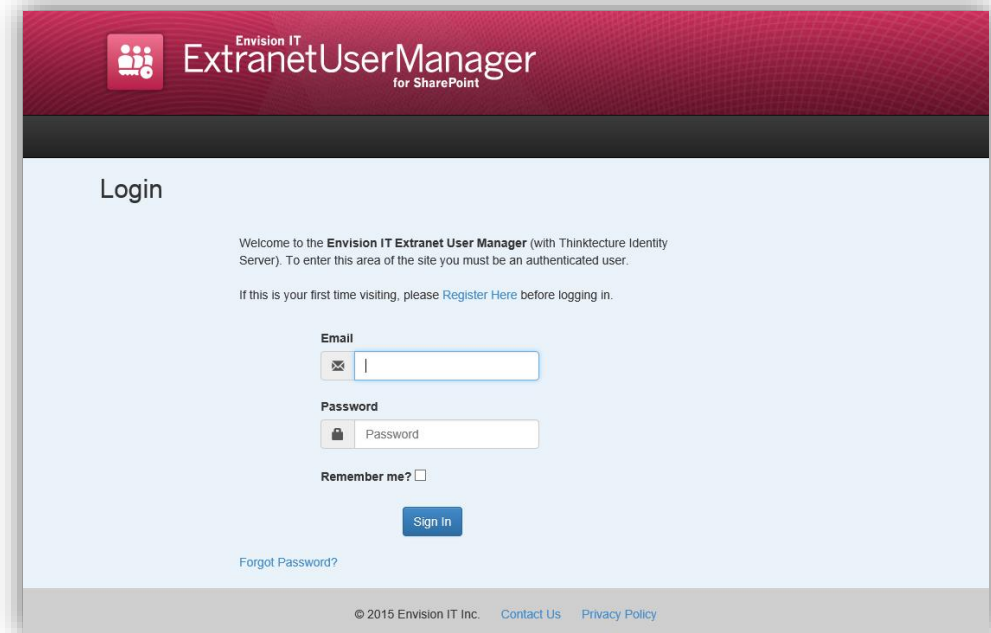
Wrapping Up

- 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



- 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
 - www.extranetusermanager.com/Events-and-News/Events/Webinar-2015-09-16-External-Collaboration-with-Office-365-Project-Sites

Questions and Next steps

THANK YOU!
