The Project Management Solution

Solution Description

This solution is comprised of a project dashboard and workspace sites, one per project. The workspace sites can be created based on either the Project Workspace template or the Project Workspace Advanced template. While this solution is comprised of three templates, you can use any of them on their own or together.

The dashboard aggregates the details of multiple projects, so you can see integrated views of activity across all of the projects. The workspaces provide a place for the teams to coordinate their work and are generic enough to address many different types of project environments.

Solution Category: Project-Based

Primary Design Pattern: Tiered

For a diagram of a common scenario for this solution, please see the last page of this document.

The Project Dashboard Site

Site Description

The Project Dashboard site pulls information from multiple projects together for a consolidated view, enabling groups of people to manage and coordinate the work on all of their projects. It can pull information from any number of Project Workspaces and/or Advanced Project Workspaces.

This site can be utilized by individuals with a variety of roles, including:

- Managers, including those at the senior level for the departments that are working on the projects, and those who supervise people who are matrixed on more than one project
- Resource planners
- Project managers with more than one project
- Workers who are affected by or involved in the projects

When to Use This Solution

When any of the roles described above will want to see information from more than one project consolidated in one place.

How to Use the Project Dashboard

Projects Tab

This is the dashboard site's home page. It displays key information for each project, with current projects grouped first, followed by inactive projects. It includes a summary description of each project, as well as the budget, due date, and project manager.

In addition, this page provides the Create new Project site (go to Workplace Wizard page) action. This is to make it simple to get to the interface for creating project workspace sites and avoid the extra steps of creating the sites manually through SharePoint.

This page also provides the Add new project and workspace URL to list action. However, from each Project Workspace, there is a place to enter this same project information and an action to create the entry in the Project Workspaces Directory. It is recommended that you enter the information in the project workspace so that is available there, and that you also run the action in the workspace because it automatically enters the URL for you. If your organization has some project workspaces that do not have this action configured, you can use the action in the dashboard, instead.

Several options are available via a cascading menu off the Projects tab:

Projects/Project Due Date Calendar

Presents a calendar view of project due dates. The information comes from the Project Workspaces Directory.

*Projects/Project Milestones and Status**

This is the best dashboard view for getting high-level statistics of all projects. It displays project milestones, grouped as Overdue, Upcoming, or Complete. The main audience for this information is executives.

The group headings, such as the red color for overdue items, follow a standard color scheme that can be found throughout CorasWorks solutions and is documented in the CorasWorks Best Practices Guide, available in the Support/Documents section of CorasWorks Central.

Projects/Management Messages to Projects

This tab provides an easy way for management to enter important information that project team members should be aware of and have that message appear on the home page of every project's workspace site. Actions in the drop-down selection allow creation, expiration, and deletion of messages, plus an option to send an email notification of a message to an individual. Instructions are provided at the top of the page.

Issues Tab*

Displays all issues that are not marked Complete in any project site. For either type of Project site, this means the item has an Entry Type of "Issue," and the Status is not "03-Complete."

*Issues/Complete Issues**

Displays issues marked Complete. If someone is looking to see what happened to a particular issue, they can find it here, rather than having it just "disappear" from the dashboard after it is complete.

Tasks Tab*

Displays all tasks from all projects, grouped by project. Separated into Tasks and SubTasks for advanced workspaces, and just Tasks for regular workspaces. Both are sorted by Due Date.

*Tasks/Overdue Tasks**

Provides easy access to an action to mark a task as Completed.

Events Tab*

Lists all entries in any Events lists from projects. If your organization has certain meetings that are standard for most projects, such as kick-off meetings, project board meetings, checkpoint reviews, or lessons learned, you could require that project managers create entries for such meetings on the project site's Events list. Then, these meetings can be seen as a group in the dashboard.

Project Manager Tab

This information is of particular interest to the individual with the role of Project Manager. The first display lists projects that the currently logged in user manages, according to the Project Workspaces Directory list. The second display shows Milestones from those projects.

Notice that by basing the displays under this tab on the Project Workspaces Directory and the view "Current Projects I Manage" (where the current user's name is in the Project Manager column), all the information is uniquely filtered to show only the correct projects for the project manager who is currently logged in. This is very powerful in an organization where project managers are frequently responsible for more than one project. Project managers can focus on the work they need to do, check the status of many items from one place, and more easily juggle multiple projects, rather than navigating around different web sites.

Additional options are available from a cascading menu off the Project Manager tab:

Project Manager/Tasks In My Projects

Displays all Tasks and SubTasks from current projects where the project manager is the current user. Links to the project site and the individual tasks allow the user to easily update information.

Project Manager/Resources On My Projects

Displays resource information from the projects that have a Resource list (workspaces with management module).

Project Manager/Project Management Documents In My Projects

Rolls up Project Management documents from each of the project workspaces within the management module.

Project Manager/Issues In My Projects

Displays all Issues from current projects where the project manager is the current user.

My Tasks Tab*

Shows all of the tasks across all of the projects for which the currently logged in user is responsible. Because the Project Workspace and the Project Workspace Advanced sites use different formats for tasks (different lists and columns), they are shown in separate web parts on the page.

Additional options are available from a cascading menu off this tab:

*My Tasks/Issues Assigned to Me**

Shows all of the open issues across all of the projects for which the currently logged in user is responsible.

*My Tasks/Documents I Have Edited**

Shows all of the documents across all of the projects that the currently logged in user has either created or modified.

Cross-Site Search Tab

Allows the user to perform a full-text search of the dashboard and the related project workspaces. The user can search within lists, libraries, or both.

*** Dashboard Note: Line-of-Site under current site web parts**

* Displays marked above with an asterisk are configured to show data from workspaces that are sub-sites of the dashboard site. See the Solution Setup Guide for information on how to change this to pull data from sites listed in the Project Workspaces Directory, instead.

The Project Workspace Site

Site Description

This is a simple, single working space for project information, where a project team can come together to collaborate. It provides a secure repository for all files and data generated for a project, which is a more productive location to store and share work than PC hard drives and email. It allows teams to manage their projects without requiring the users to become experts in a complicated process.

A project workspace can be created to stand on its own, or it can be "rolled up" to a Project Dashboard solution.

Solution Category: Project-Based

Primary Design Pattern: Workspace

When to Use This Site

This is a good site for project teams that are new to SharePoint because:

1. It focuses on providing storage for ad hoc project documents. The first step to better information management is getting this kind of document out of email and off of personal hard drives and into a secure, shared server location.
2. It allows the use of tasks on an as-needed basis.
3. The project manager can work without an in-depth knowledge of SharePoint, using it to store documents and following the on-screen directions to enter required information that then rolls up to the management dashboard.

How to Use the Project Workspace Site

Project Maintenance Data

When a Project Workspace is first created, there is some initial data entry that should occur.

First, go to the Project Maintenance tab. Edit the Project Overview information to be specific to this project. Then, select Add project entry to Dashboard from the drop-down and click Go. This adds the URL for the workspace site and the information in the project summary list to the Project Dashboard's Project Workspaces Directory.

Next, in the Messages section, modify the Initial Project Message (click the edit icon at the beginning of the row.) If your team is new to SharePoint, some information about the expected work processes in the site may be useful. If you decide not to use this feature, delete the Project Messages web part from the home page. (You can export it to a file in case you want to import it back later if needed.)

Finally, on the Project Maintenance tab, update the Milestones to make them specific to your project. Sample values are provided to help you get started. Some organizations may want to come up with their own standard list of milestones to make project reporting uniform. The Status column choices and Due Date column are used in the dashboard, so take care to fill these out and keep them updated throughout the project.

Project Events

If you open the Events list (on the left navigation, expand Lists and click Events), you will see one item. It describes a kick-off meeting that will make use of your workspace site more successful. You may choose to schedule such a meeting and update this item to the actual meeting date and time. If you have other important project events planned, enter them here. These events will "roll up" to the dashboard, so the events list can be useful for items that you want to make management aware of, or that need to be coordinated with other projects.

Entering Tasks

Some project tasks need to be tracked closely, or the task status and information needs to be shared among the team members. It is beneficial to enter these kinds of tasks into the Project Workspace Tasks list. You can also choose to enter all tasks into the task lists and treat it like a project plan. If you are entering a large number of tasks, under the Tasks and Issues tab, there is a page called "Bulk Create or Update Tasks and Issues" that provides a spreadsheet view for data entry. You can also enter tasks by accessing the tasks list directly (in the left menu, expand Lists and click Tasks).

Entering Issues

As the project goes on, Issues may need to be tracked and shared with the team. To add an Issue, go to the Tasks and Issues tab, and select Create new issue from the drop-down, then click Go. The section on this page for Active Issues serves as a great place to review issues with the team.

Tasks and Issues are kept in the same list because in a simple project, they are often managed in the same way. Both usually have a deadline, are assigned to one person to act as a focal point, and have a need to record a description and comments so that details and updates can to be shared. You will find that entering notes in the Append–only Comment field creates a nice ongoing record of updates, and prevents the description field from becoming too long or cluttered.

Files and documents

On the Files tab, you will find the Project Files document library. Any files related to the project should be stored here. Team members can upload items they are working on, or use the New Document option to create items in a secure server location from the start. When team members need to share documents with each other, they should be sure to send a URL link to the document in the Project Files library, rather than attaching a file to an e-mail.

Any file can be marked as a deliverable. If your project has important deliverables documents, you may want to make use of the Deliverables page, located under the Files tab. This gives a clear view of only those documents that are marked as deliverables, separating them from all the other work that may be going on. The Files library also allows you to associate a file with a particular task by filling in the Related Task column. When a file is a deliverable, it is usually a good practice to have a particular Task associated with it, as the deliverable is the output of a task.

Requesting Task or Issue Updates

The project workspace provides a process for asking task or issue assignees to enter updates. Because tasks may not be used heavily in the project workspace, it may be necessary to remind people when they need to enter a task update on the site. From the Schedule, Tasks tab, check the box next to an item, and select Request Update from Assignee from the drop-down and click Go. The status will be changed to Update Requested, and an e-mail will be sent to the assignee.

This can be useful if you set up a work process where people are required to enter their updates at a regular interval, such as once a month. You can use the action to send reminders, and know when someone has completed an update because they will change the status to an appropriate value.

Home Tab

Once the project is setup, the Home tab is designed to quickly and easily get project contributors to the information they need to get their work done. The “My” views on this page show people their own files, tasks, and issues. By putting the management and project messages on the same page, when critical information needs to be “pushed” to project members, they will see the messages that management wants them to see.

Common Setup Changes

1. Create a Document Category column in the Project Files library as your library grows. If you want the Document Category column to show up in CorasWorks Active Display web parts, you must access the web part’s administration interface and add Document Category on the Columns tab.
2. Create additional document libraries to handle different areas of the project. This is especially important on a large project. If you create document libraries that contain the same columns as the existing document libraries in this solution, they will automatically appear in the roll-up of files on the home page.
3. The Workplace Inbox solution provides a powerful central page for important activities to be aggregated from any SharePoint site or solution. From the Tasks And Issues page, there is an option to Add a task to the Workplace Inbox. If you organization takes advantage of the Workplace Inbox, you may wish to use this action. Otherwise, you may wish to remove it. See more details in the Solution Setup Guide.

The Project Workspace Advanced Site

Site Description

A Project Workspace Advanced site includes a robust set of functionality for managing a project based on commonly recognized good project management practices. It also is meant to be a single repository for all files and data generated for a single project. This can be thought of as "Project Management for the rest of us" – those who need to manage projects, but not at the level of being an expert in tools such as Microsoft Project.

A Project Workspace Advanced site can stand on its own, or it can be "rolled up" to a Project Dashboard solution.

Solution Category: Project-Based

Primary Design Pattern: Workspace

When to Use This Solution

This is solution is a good choice when:

- The project manager wants to leverage automated tasks and other online capabilities as much as possible. For any manager working without a project management software tool, this site becomes that tool and provides a great, organized start in following project management best practices.
- The number of tasks in the project is large and would be easier to manage if they were grouped into subtasks.
- Resources must track their hours and the project manager must track hours and associated costs.

How to Use the Project Workspace Advanced Site

Project Maintenance Data

When the site is created, the first thing that needs to be done is to fill out the Maint tab. This is very similar to the Project Maintenance tab in the project workspace. See the section on Project Maintenance Data under the project workspace in this document.

One minor difference is the Milestones display. No sample milestones are provided in the Project Workspace Advanced, but you should add your own that they can roll up to the dashboard.

Entering resources

The names and roles of the project team members should be entered in the Resources list. Do this by expanding lists on the left-hand site navigation, and select Resources. The names in the Resources list are available to the Resource column in the Tasks and SubTasks Lists. You can also add resources from the Resources page under the People, Cost tab.

Customize Project Phases

The Project Workspace Advanced is designed to group tasks by phases. Project phase is a choice column in the Tasks list, however you should review the phases available and change them to what makes sense for your project. Access the Tasks list by expanding Lists then clicking Tasks from the left menu navigation. Once in the Tasks list, click Modify Settings and Columns and change the Project Phase column if needed. Keep the 2-digit numbers that begin every phase value to maintain compatibility with other roll-ups and projects.

Entering Tasks

Under the Schedule, Tasks tab, there is a page called the Tasks and SubTasks Create or Update. From this page, you can select the Create A New Task action from the drop-down, click Go, and fill in a short form of the fields necessary for a new task.

SubTasks

A key benefit of the Project Workspace Advanced site is that provides a way to associate many subtasks with one high-level task. Therefore, you should enter a list of summary tasks, then enter the smaller steps necessary to complete those tasks as SubTasks. You may want to allow team members to create their own subtasks after a being assigned a high level task. SubTasks are also valuable because you can have one person accountable for the overall Task, but when the parts of the task are actually going to be done by many team members, each team member can be a resource for individual subtasks.

To create a SubTask, start from the Tasks and SubTasks Create or Update page. Expand a task, and click Add New SubTask … shown next to the asterisk. This will bring you to the SubTask entry form, with the correct parent Task already filled in.

Entering a large number of tasks and subtasks

When a project begins, you may want to type in many tasks at once. The Bulk Create Or Update page (accessed via the fly-out to the right of the Tasks And Sub-Tasks Create Or Update Menu) shows datasheet views of both the Tasks and the Subtasks lists. Task creation can be done quickly on one page in a familiar "spreadsheet" interface.

Risks and issues

The Project Workspace Advanced provides a format for risks and issues that helps you identify important information for mitigating risks and for quantifying and dealing with issues. Create a list of project risks and how you can mitigate them by going to the Risks, Issues tab and selecting Create New Risk from the drop-down. When you click Go, the Risk form will show you only the fields that you need to enter when first adding a risk. In the underlying list, additional fields are available should you need to enter more detail.

If, during the project, a risk begins to actually have a negative impact on the time, budget, scope, or quality of the finished project, its Status should be changed to Issue. Use the Change Risk To Issue action in the drop-down. It will show you the issue-specific fields that should be filled out. These fields are used when viewing the Issues and Issues By Impact pages.

Tracking Tasks and SubTasks as the Project Continues

In order to continually improve planning and estimating, it is useful to compare the actual time something takes to the initial estimate. Several views under the People, Cost tab make use of the Estimated Effort and Actual Effort columns to allow you to easily make this comparison.

In addition to updating the actual effort spent on tasks, team members should add notes and change task statuses as needed. The Home page displays all tasks for the project regardless of the resource assigned, and below each task, subtasks filtered to only those assigned to the current user. People can edit tasks from here by clicking the edit icon at the beginning of a row. This will allow them to easily keep the team informed of task status.

Additional Tab and View information

The following are general descriptions of the tabs and pages in the solution.

The Home Tab

The Home tab provides a focal point for the overall project and the user's role in it. At the top of the tab, the project summary information is displayed. Then, management and project messages are displayed, allowing team members to see critical information regarding the project and any messages that have been "pushed" to the site by management.

After that, all of the active tasks for the project and the current user's subtasks (the real work she or he needs to focus on) are shown.

Calendar

A team events calendar is also available via a drop-down from the Home tab. The calendar is color-coded, so it's easy to find events within a certain category.

Items Created in the Last 7 Days View

A view of all project-related items that have been created within the last seven days in any of the project lists. This allows team members to be up-to-date on the latest developments.

Schedule, Tasks Tab

This tab provides a good way to see the project schedule at a high level and the progress to date. It displays tasks, but no subtasks, by phase. Charts compare actual phase progress with estimates.

Visual Timeline (Gantt Chart) View

This presents a Gantt chart view of the Task timeline.

People, Cost Tab

This tab is meant to be used by the project manager and others to understand the workload over time for each resource.

The main tab presents two bar charts, one showing the expenses entered to date regarding the project, and the other showing the number of hours of effort entered for the project tasks.

The options available from the cascading menu off this tab enable you to manage the resources assigned to the project, keep track of the estimated and actual number of hours associated with each project task, and track expenses.

Resources

When you first access this page, a chart at the top shows a timeline of all tasks related to the project, followed by the tasks assigned to each resource. To limit this display so it shows the tasks and hours for a single resource, select the resource's name from the radio button list on the left side of the page.

To add a resource to the project, click the Add new item link under Resources in the left margin of the page.

Effort

Shows all of the tasks associated with the project, grouped by resource. Includes the estimated and actual effort for each task, with subtotals by resource.

Effort by Project Phase

Shows all of the tasks associated with the project, grouped by project phase. Includes the estimated and actual effort for each task, with subtotals by phase.

Effort by Status

Shows all of the tasks associated with the project, grouped by status. Includes the estimated and actual effort for each task, with subtotals by status.

Expenses

If your project needs to track the expenditure of money above and beyond the hours of effort put in by team a members, the expenses pages are available. "My Expenses" shows the expenses entered by the currently logged in user, while "Expense Tracking" shows all project expenses. "Expense Tracking" includes actions to add a new expense and update the status of an existing expense item.

Expenses Submitted

Shows all project expenses with a status of "Submitted." Includes an action to update the status of selected expense items.

Expenses Completed

Shows all project expenses with any status other than "Submitted." Includes an action to update the status of selected expense items.

Expense Totals

Shows all project expenses, grouped and subtotaled by category. A grand total is provided at the bottom of the display.

Risks, Issues Tab

This tab is used to keep track of any risks and issues associated with a project. Risks should be entered at the beginning of a project and as needed as potential problems are identified.

Additional options off the tab enable you to view the following:

- Risks grouped by probability
- Risks grouped by impact
- Issues grouped by affected life cycle phase
- Issues grouped by impact

Team Events Tab

This tab is used to maintain the list of team events (meetings) and view any subtasks and action items related to each event. The events you enter here are displayed on the calendar that is available off the Home tab. Subtasks are maintained off the Schedule, Tasks tab, while action items are maintained via the Event Action Items option.

The main tab lists all upcoming and past events, and provides an action that enables you to send a custom email with a link to one or more events. It also lists any subtasks associated with the team events.

Event Action Items

Displays all of the team events for the project, with the action items related to each event. An action item is something that needs to be done either to prepare for the event or as a result of the event.

Several actions are available on this page:

- Create new event actions
- Create new team event
- Create a new event action based upon an existing event action
  - This is helpful if you have several action items related to the same team meeting. Many of the column values are likely to be the same, so you can modify just the values you need to.
- Modify event action(s)
- Modify team events
- Send a custom email with a link to one or more action items

Event Discussions

Displays all of the team events for the project, with any discussion topics related to each event. Actions are available to create a new event discussion topic, create an event discussion topic based upon an existing one, or send a custom email with a link to one or more discussion topics.

Documents Tab

This tab is used by the entire team to maintain working documents, project deliverables, and any other kinds of files that need to be saved and shared. The main Documents tab shows all project-related documents, grouped by type. Additional views off the tab enable project team members to view and maintain deliverables, project files, and project management documents. The Project Management Documents view allows documents to be linked with a particular risk or issue.

Note that the Deliverables library contains a column called "Related Task." When a file is a deliverable, it is usually a good practice to have a particular Task associated with it, as the deliverable is the output of a task.

Maint Tab

This tab provides the project manager with a single location where key project information can be maintained, including:

- An overview of the project
- Messages to be displayed on the workspace's Home tab
- Project milestones and milestone descriptions

Tech Admin Tab

This tab provides quick access to administrative web parts that are used to create additional project workspaces, define and modify actions, email-enable lists, and create custom roll-ups and active displays.

Project Management Process Diagram