Remote Project Delivery Using Office 365, Microsoft Teams, and Project Online

Unify
Your Infrastructure

Manage
People and Teams

Modernize
Business Solutions

April 2020

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ShareSquared: Webinar QA

Question	Answer
Is it better to create a Group first versus a Team?	We recommend that you create the O365 Group first, then Teams-enable or extend it; for details please click here
How are you making your custom forms? Is it using PowerApps?	On the webinar, we demonstrated a Power Apps form for requesting the creation of a new Project Portal. We also showed a Change Order workflow, which uses Plumsail Forms, a product we resell and use to implement more sophisticated forms.
Please define "extended" he has mentioned a few times but would appreciate some clarification about meaning.	Extend in this context means to Teams-enable or apply a Team to an existing O365 Group as described in the first answer above
Are the tabs out of the box?	The Tab functionality is out of the box however, the only Tabs that are created by default are Posts, Files, Wiki . Any Member of the Team can create additional Tabs, which can be used to display applications such as a Website, Planner, Custom Tabs, 3rd-party Tabs, etc.
This is a great for standardizing processes. Is this difficult to implement because of the details needed for each workflow?	Assuming this question was in reference to the Change Order workflow, Power Apps and Flow are relatively easy to implement however, the implementation difficulty increases with the number of steps, connectors, parties involved, etc. Difficulty is minimized by breaking the overall process down into smaller steps and automating the individual steps. Start with the easy steps and move on to more-complex pieces as your knowledge and skills grow.
Does this require a high level of project management, let's say, using a PMP?	We believe that the methodology we employ reduces the level of project management due to the use of Project Portals that house all project artifacts, Automated Processes (e.g. Change Order, Weekly Status Reports generated from Project Online), Recorded Teams Sessions which are used to capture project requirements, decisions, and other salient project information which reduces documentation requirements, etc.

ShareSquared: Webinar QA

Question	Answer
Is Planner integrated to MS Project Online?	The only "integration" is hyperlinks from a Project Task to a Planner Plan. Otherwise, there is no out of the box integration however, we have several custom applications that use both the Planner and Project Online APIs and these APIs could be used to integrate the two products.
Is that link in Planner to the Project Portal a customize API or built into Planner?	A Task in Planner can contain links; in this case it was a link to the Project Portal. The Task also contains fields for the Bucket, Progress, Priority, Start Date, Due Date, Notes, a Checklist, Attachments which are either links or actual attachments, and Comments which are stored in the shared Exchange email box for the Group
I work in a remote facility and my enterprise controls our SharePoint site. Is it possible to deploy Shared Squared without having our enterprise group tweak parameters on that level?	To run the Portal Deployment Utility that we demonstrated on the Webinar requires the credentials of a SharePoint Administrator to do the deployment. These rights can be revoked after the deployment is complete.
Do external members also gain access to the that group email address?	There is a setting on the Group to specify whether or not the Group email box can receive email from external users. If this is set to yes, external members or Guests can send/receive email to/from the Group email address
You said each department gets their own Team Site. How do you manage a site or Team that should be lead by a certain group, but want everyone to be able to reference/use the conversation area within Teams?	Only members can participate in Teams conversations. Depending on your requirements, you can do this with a **Public** Team

Presenters: Remote Project Delivery

- **David Kruglov**
  Director of Project Delivery

- **Jim Duncan**
  Microsoft Certified Master

But before we get started!

- Jim will kick off our Portal Deployment Utility to build a collection of project sites while we continue the presentation… more on this later.

Agenda: Remote Project Delivery

- **Overview (10 Mins)**
  - Intention for the Webinar
  - Why Go Remote
  - What We Do
  - Where this Approach has Worked
- **Tools and Technology Demos (45 Mins)**
  - Project Portals
  - Project Management
  - Productivity
- **Closing and QA (5 Mins)**
  - Recap and QA

Intention: Intention for the Webinar

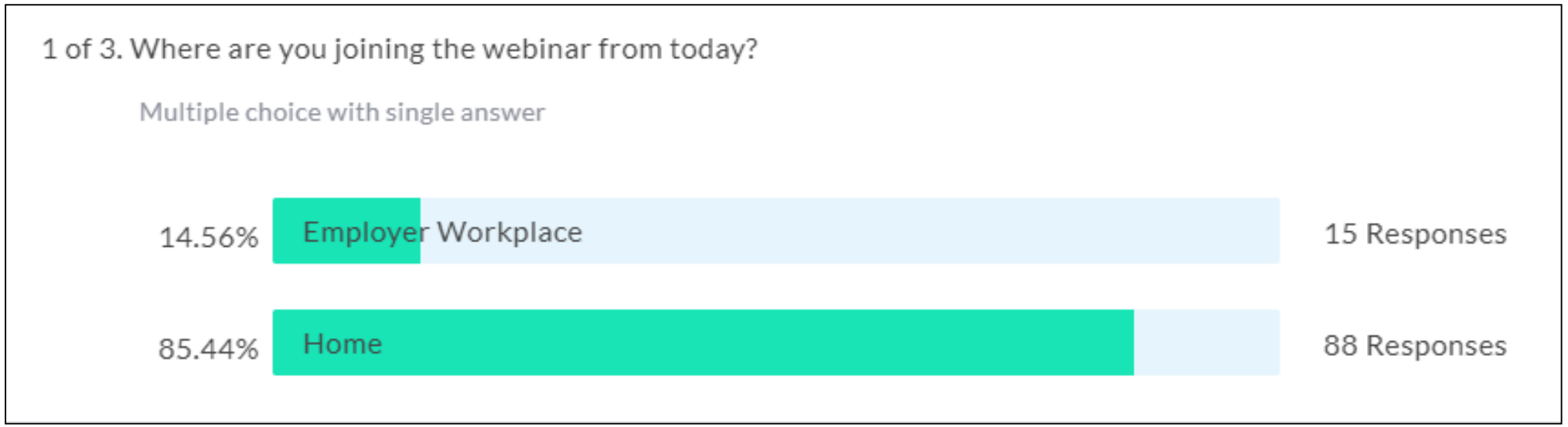
- Share with you how we deliver Remote Projects, which we've done for almost 15 years
- Teach you about the technologies we use and how we implement them
- Help you make decisions about how best to address Remote Project Delivery, O365, Teams, etc.
- Answer any questions you may have

Be of Service to You!

Poll: Where are you joining the webinar from today?

- Employer Workplace
- Home
- Shared Workplace (e.g. WeWork)
- Ad Hoc Location (e.g. Starbucks)

Results:



Background: Why Go Remote

Reduces project logistics, travel time and expenses, and employee costs

Flexibility

- Enables participation from multiple locations
- Use the most qualified resources, independent of location

Recorded Sessions

- Reviewed by team members who could not attend
- Saved for future reference or for training

Eco-Friendliness

- San Francisco average concentration of fine particulate matter down 40%
- New York down 28%

Reduces Risk

- Accidents on-premises
- Security and health concerns

The Technology is Ready!!

ShareSquared: Who We Are

Background

- Founded in 2004 focused on Intranets, Electronic Forms and Workflow, Document Capture, ECM, and EDRMS
- 13 MVPs and 5 MCMs in our history
- Solution Provider for SharePoint, O365, Azure, etc.

Differentiators

- Microsoft Certified Masters
- Records Management Certified
- Accelerators and Products

Microsoft Programs

- Microsoft Partner with multiple Gold Competencies
- Member of Business-Critical SharePoint
- SharePoint Technology Adoption Program member
- SharePoint Partner Advisory Council board member
- Microsoft Partner Research member
- FastTrack, SDPS, Cloud Accelerate, etc. provider

Microsoft Partner
Microsoft
Gold Cloud Platform
Gold Cloud Productivity
Gold Collaboration and Content
Gold Datacenter
Silver Small and Midmarket Cloud Solutions

Microsoft CERTIFIED Master

Office 365

Azure

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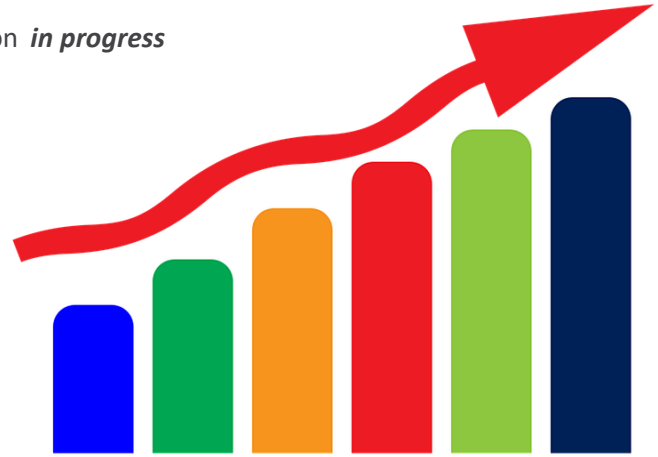
Customers: Where This Approach Has Worked

- **Morguard Real Estate** Intranet and EDRMS Solution ***in progress***
- **Brookfield Renewables** Modern Intranet Solution ***in progress***
- **Civic Real Estate and Property Management** Intranet and EDRMS Solution ***in progress***
- **Contra Costa Water District** Assessment, Content Migration, Workflow, and Modernization ***in progress***
- **Fairfield Suisun Sewer District** Intranet and EDRMS Solution ***in progress***
- **City of Vallejo** Modern Intranet Solution
- **Public Services Alliance Canada** Intranet and EDRMS pilot (complete) and upcoming enterprise solution
- **San Diego County Water** EDRMS Solution with content auto-classification using ConceptSearching ***in progress***
- **State of Washington, Department of Ecology** Records Management Proof of Concept
- **Santa Clarita Valley Water** Modern Intranet Solution
- **City of Benicia, CA** Modern Intranet Solution
- **State of South Carolina** Premium Branding Themes and Web Parts
- **City of Olympia, WA** Modern Intranet and Digital Workspace Solution
- **Agricultural Financial Services Corporation, AB** Assessment & Strategic Plan, Content Migration and Modernization ***in progress***
- **Port of Seattle, WA** Modern Intranet and Project Management Portal Solution
- **Alameda County Water District** EDRMS File Plan and Roadmap solution with RIMTech
- **WaterOne, KS** EDRMS Solution with RecordPoint and RIMTech
- **City of Belmont, CA** Intranet, Project Management and Workflow Solution
- **County of San Diego** EDRMS Solution using Gimmal with integration to OpenText
- **County of Los Angeles County Clerk Registrar Recorder** Modern Intranet Solution
- **Lacombe County, AB** EDRMS Solution with RecordPoint and RIMTech
- **Golden Valley Electrical Association** EDRMS Solution with Gimmal
- **County of Los Angeles Dept. of Human Resources** Modern Intranet
- **State of Vermont** EDRMS Solution with RecordPoint
- **City of Salt Lake City, UT** Modern Intranet Solution and Content Migration
- **City of Danville, CA** Intranet Solution
- **City of Auburn, AL** SharePoint Intranet and City Solutions Agenda, Public Records Request
- **Sacramento Area Sewer District** FileNet Migration to SharePoint EDRMS
- **City of San Jose, CA** 40 Terabyte File Share Migration Assessment and Best Practices
- **County of Los Angeles CIO's Office** Intranet and Content Migration
- **County of San Mateo, CA** ECM/ERM solution on SharePoint
- **City of Pasadena, CA** ECM/ERM Gimmal solution on SharePoint
- **County of Los Angeles DPW** FileNet Migration to SharePoint ECM



Active Projects are still moving forward during the crisis without interruption!!

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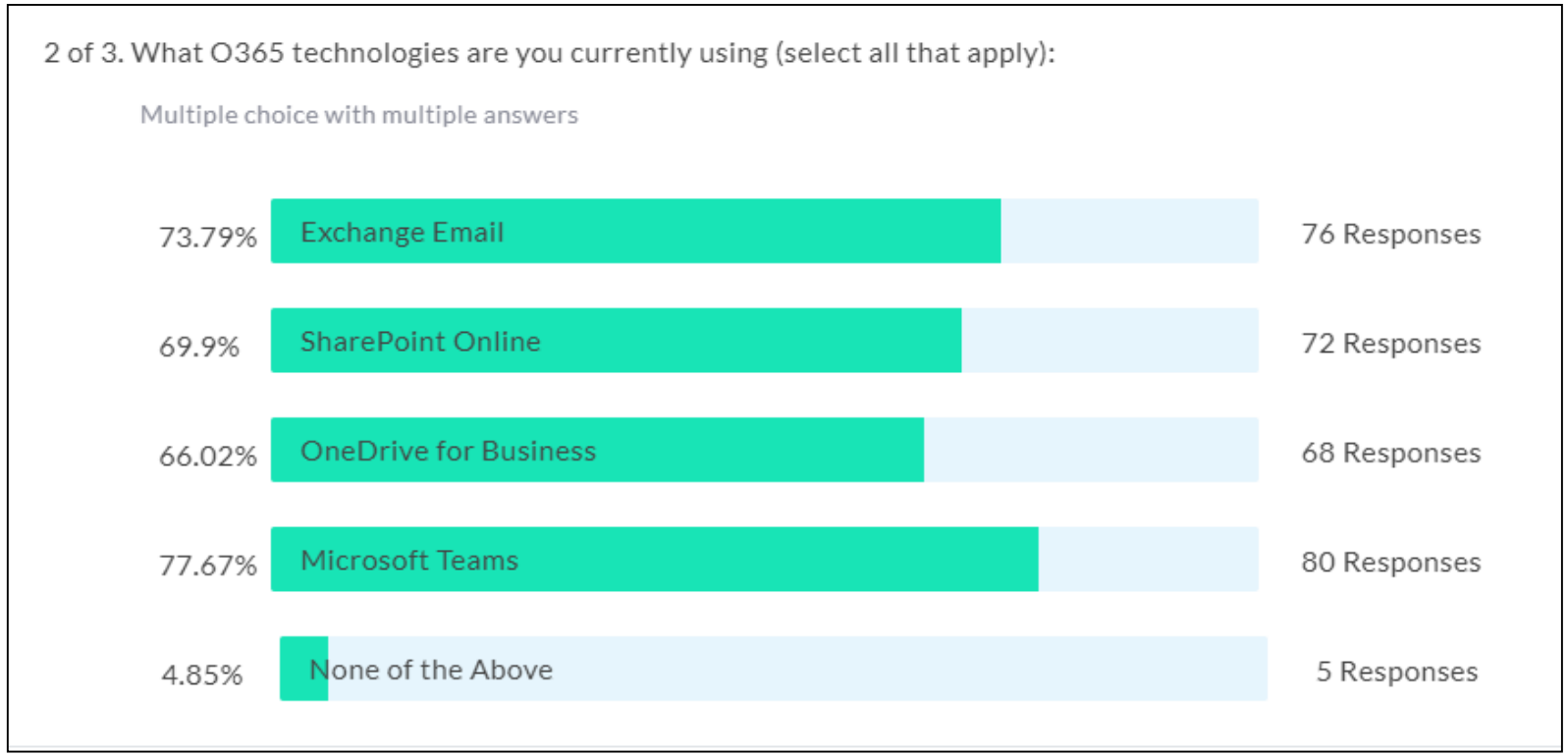
Poll: What O365 technologies is your organization using?

- Exchange Email
- SharePoint Online
- OneDrive for Business
- Microsoft Teams
- None of the Above

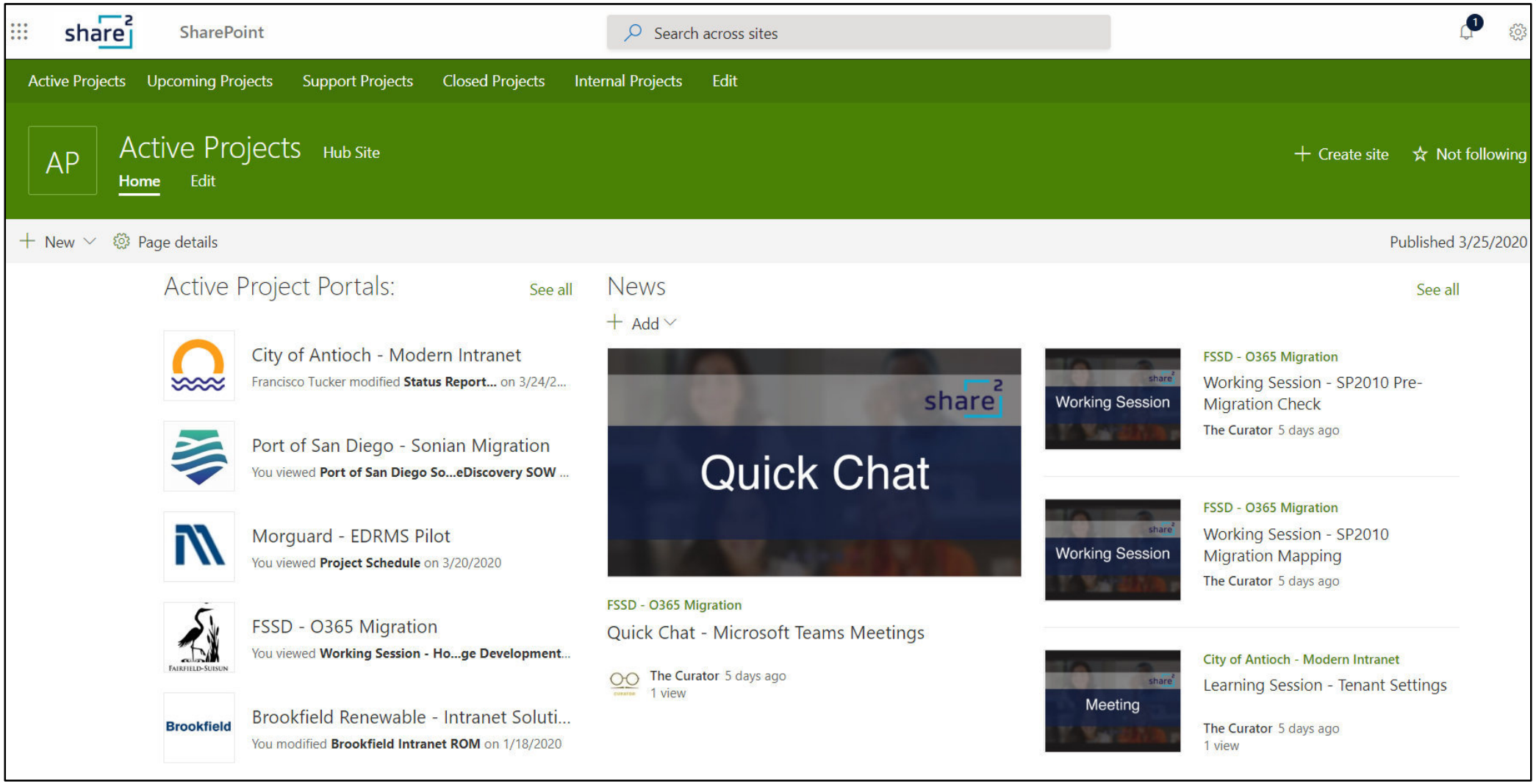
Results



Demos: Tools and Technology

- Project Portals
  - Project Hubs
  - Office 365 Groups
  - Meetings and Curation
  - Self-Service Help and Training
- Project Management
  - Microsoft Project Online
  - Change Orders
  - *Another Example:* Weekly Status Report
- Productivity
  - Microsoft Teams
  - Microsoft Planner and ToDo
  - MyAnalytics
- *Portal Creation Results*

Demos: Portal Creation Results



Closing & QA: What We Covered

- Why Go Remote
- What We Do
- Where this Approach has Worked
- Project Portals
- Project Management
- Productivity

Contact Info:

ShareSquared, Inc.
David Kruglov
David@ShareSquared.com

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