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Simplify Project Management With SharePoint

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We're all project managers! Whether you are an attorney responsible for a matter, a secretary revising a Word template, an IT administrator installing new servers or a full-time project manager of a 10-person team, you must plan, execute and communicate project status to a variety of stakeholders, both inside and outside of the law firm.

But, we don't all come to the task of project management with the same training and tools at our disposal. Some, like the professional project manager, may be comfortable with Gantt charts, network diagrams, CPM, work breakdown structures and the like. For the majority of us, however, these concepts are foreign and confusing. And, because one key purpose of any project management tool is to *communicate* deliverables and status, it's not enough that we understand the reports output by our project management tool -- our stakeholders must understand them too.

This article shows you how to create a simple yet powerful tool for capturing, tracking and reporting on project deliverables and status using Microsoft SharePoint 2007 (MOSS 2007) -- no programming required. The SharePoint project management tool has proven effective on a wide range of projects at Fenwick & West, and it can be adapted to a wide range of project management approaches, from the traditional "waterfall" to the emerging agile methodologies.

LOGICAL DATA MODEL

Although SharePoint does not perform relational database operations on lists, it is useful to visualize the logical relationships between the three lists I create as part of the project management tool. Two of the lists, "Projects" and "Status," will provide data to populate drop-down fields in the "Project Tasks" list. Figure 1 depicts the relationships between these lists in an entity-relationship diagram.

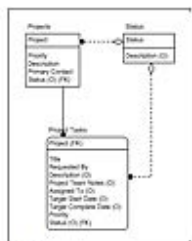


Figure 1

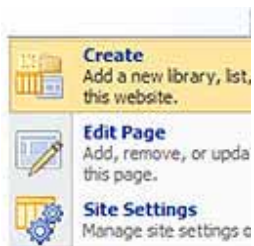
The diagram indicates that each project may have zero or more associated tasks; and each status code may have zero or more associated projects or tasks.

CREATING THE REQUIRED LISTS

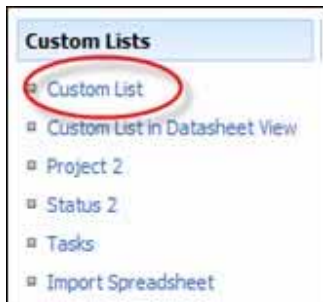
In the steps that follow I will walk you through creating the three required lists to communicate the status of a project. If you have not created a SharePoint list before, you will find this article comprehensive in providing all that you need. If you are already familiar with the process of creating lists in SharePoint, you can simply skim this section for the fields to add to each of the three lists.

Step 1: Create a list of status codes

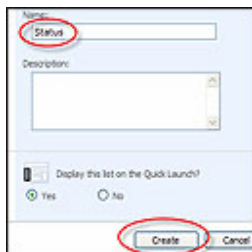
To create the "Status" list, navigate to a SharePoint Web site for which you have at least "Design" permissions. Once there, click on the "Site Actions/Create" option in the upper-right corner of the page, as shown in Figure 2, below.



Next, click on the "Custom List" option under the "Custom Lists" heading, as shown in Figure 3, below.



Name your list "Status" and enter an optional description if desired, then click the "Create" button, as shown in Figure 4, below.



SharePoint will create the new list for you, using the standard custom list template, and then display the list's "All Items" view. The "Status" list isn't quite done yet; you will need to rename the "Title" field to "Status" and add a "Description" field. To do so, select the "Settings/List Settings" menu option, as shown in Figure 5, below.



Now click on the "Title" link in the "Columns" section. This displays the "Change Column" page where you can rename "Title" to "Status." Once you've made the change click the OK button to save it, as shown in Figure 6, below.



Next, add a "Description" field to the list. To do so, click on the "Create column" link in the "Columns" section of

the "Customize Status" page. Name the new field "Description" and click OK. To return to the "All Items" view of your status list click on the "Status" link in the upper-left of your page, as shown in Figure 7, below.



All that's left to do now is to add some status codes to your list. Use the "New" link on the menu bar to enter the following status codes:

Code	Meaning
1.0 Needs More Definition	Not sufficiently defined for project team to begin work
2.0 Pending	Defined, but not yet assigned for work, or task has been removed from In Process status due to changing priorities
3.0 In Process	Work is proceeding
4.0 Complete	Project team believes task is complete, but stakeholder has not reviewed and accepted (or rejected) the task deliverable(s)
5.0 Accepted	Stakeholder has reviewed the task deliverable(s) and accepted it as complete
6.0 Rejected	Stakeholder has reviewed the task deliverable(s), but determined that they do not meet requirements. Note -- if task is still relevant to the project its status should be reset to Pending -- only use Rejected if task deliverable(s) no longer required
Parking Lot	An interesting idea or deliverable that the project team wants to keep for future reference, but not something that the team wants to focus on at this time
Cancelled	At one time considered relevant to the project, but no longer needed

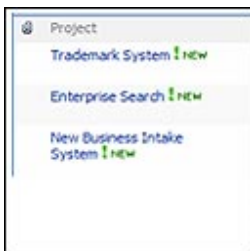
You're now ready to create a list of projects.

Step 2: Create a list of projects

This list will contain one item for each project you want to track. While it is possible to create a multivalued field in your task list to hold your project names, placing them in a separate list is a better practice. Using this approach you can easily add new projects as they arise without the need to edit the task list definition. The mechanics of defining this list are similar to those described in the preceding step, so I won't repeat them here. One difference of note, however, is the "Status" field, which you will define as a "Lookup" field, and direct SharePoint to retrieve its values from the "Status" list you created in the previous step as shown in Figure 8, below.



Once the "Projects" list is defined, you're ready to enter one or more projects, as shown in Figure 9, below.



Moving on, the next task is to create a list of tasks.

Step 3: Create a list of tasks

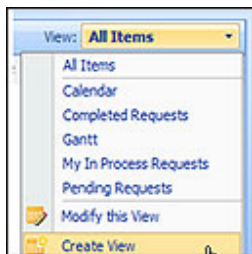
This list is where you will spend most of your time. It will contain one item for each task on each project that you want to track. The fields you'll need are:

Field	Purpose	Type
Project	The project that this task is a part of -- from project list defined above	Lookup
Title	A short descriptive phrase describing the task	Text
Requested by	Individual stakeholder requesting deliverable(s)	Person
Description	One or more sentences describing the task and deliverable(s)	Multiple lines of text
Project Team Notes	Technical and other notes for use by the project team	Multiple lines of text
Assigned To	Individual with primary responsibility for completing this task	Person
Status	The current status of this task -- from the status list defined above	Lookup
Priority	A value from 0 to 100 defining the relative business value of this task's deliverable(s)	Number from 0 to 100
Target Start Date	Optional -- date when project team expects to begin work	Date/Time
Target Complete Date	Optional -- date when project team expects to complete work	Date/Time

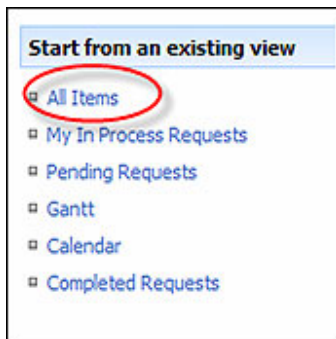
Finally, it is time to create custom views.

Step 4: Create a few custom views

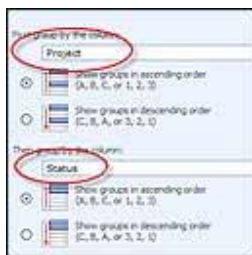
The ability to communicate project and task assignments and status is as important as capturing the information in the first place. SharePoint allows you to easily create a wide variety of views (including both "public" views that everyone can see and "private" views that are visible only to you). Here I'll show you how to create a view that groups tasks by project and within project by status. To create the view, select the "View/Create View" option, as shown in Figure 10, below.



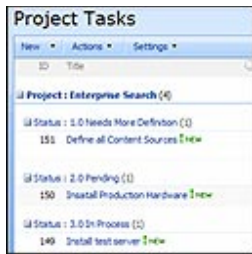
To save time, we'll base the new view on the existing "All Items" view by clicking on the link of that name in the "Start from an existing view" section of the page, as shown in Figure 11, below.



Name the new view "By Project, Status," then scroll down to the "Group By" section of the view "Create View" page, where you will set the first-level group to "Project" and the second-level to "Status," as shown in Figure 12, below.



Save your new view by clicking the OK button. Figure 13 shows the "By Project, Status" view after a few tasks have been entered:



Other views that you might find useful include a "Gantt" chart (new to SharePoint 2007) that provides a graphical time line of your tasks, as shown in Figure 14, below.



In addition, you can add a "Calendar" view, which provides daily, weekly or monthly snapshots of tasks based on target start/complete dates, as shown in Figure 15, below.



PUTTING YOUR PROJECT MANAGEMENT LIST TO WORK

Congratulations! Your SharePoint project management tool is now ready for use. Assuming you've already entered one or more projects in the "Projects" list, you're ready to begin entering tasks.

How you use the task list will depend on your project methodology. At my firm we have adopted the SCRUM Agile methodology, in which we typically meet with project stakeholders every other week to review completed work, identify new tasks and reprioritize the pending items. During these meetings the "Project Tasks" list is edited in real time, using project-specific views of items in "Pending" and "Complete" states. Between these biweekly meetings the project team will meet three to five times per week to review "In Process" tasks. For projects with direct client involvement we host the list on our extranet so that our clients may view, edit and add to the tasks as well.

Of course project management is really about people, not technology, and what we've created here is simply a tool to help record, review and communicate project and task status. But unlike many commercial project management applications, this SharePoint tool is easy for all stakeholders to understand and work with. You may find, as I have at my firm, that this SharePoint project management tool provides the best balance of functionality, flexibility and simplicity for many of your projects.

Mark Gerow has more than 20 years of experience in IT, professional services and software product development and has provided consulting services to hundreds of companies throughout the San Francisco Bay Area and Northern California. He currently works for Fenwick & West, where he leads the application development team and is responsible for defining and implementing the firm's intranet and extranet strategies using SharePoint technologies. He can be reached at mgerow@fenwick.com.