

Microsoft Office 365 for Construction Project Management?



Does your business use Microsoft Office 365? Let's begin by clarifying what Office 365 is. Some think of Office 365 as Word, Excel, PowerPoint, and Outlook applications. Others recognize the name because it came with the PC they purchased. Some organizations use Office 365 because their IT professional told them to move to Microsoft's hosted email platform.

Office 365 is a Cloud-based business platform managed by Microsoft for hosted email, file sharing, online meetings, calendaring, and much more. But what does this mean for you, and how does it help improve your business? For the past 20 years, we've worked with customers from various industries and business types—but they all share a common theme: project management.

We want to help you learn about the tools and features that are available from Microsoft and show you how you can use them to improve your business. There are many companies that have moved, or are planning to move, to Microsoft's Cloud platform. But a large majority of those companies only know about a tiny sliver of Office 365's capabilities.

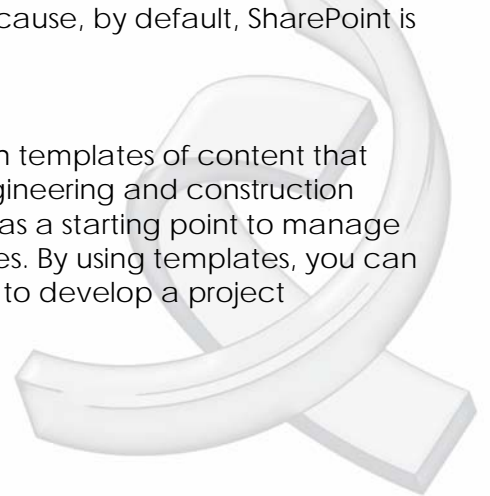
Let's look at the apps that are available with a standard subscription of Office 365. There are traditional apps for email like Mail, Calendar, and People. There are apps for online versions of Microsoft Office apps like Word, Excel, PowerPoint, and OneNote. And there are so many more apps that are valuable, but only if you know what they are and how to use them. We help customers leverage these tools as project management tools. Many of the Office 365 apps and features can help with project management, adding to the value that they can bring to your business. If you're using Office 365 today, then you may have access to these tools without even knowing it!

SharePoint App

SharePoint is an enterprise content management system typically used to develop a company's corporate intranet or secure employee website. People don't know where to start with SharePoint, and often the team members who help set up Office 365 are network specialists, not business analysts. It can be very intimidating to try and figure out where to start with SharePoint because, by default, SharePoint is installed as a blank site without any content.

Templates

When we work with clients to set up and configure SharePoint, we establish templates of content that can be reused within the company. For example, our customers in the engineering and construction industries often use construction project management apps such as VPO, as a starting point to manage bidding, design reviews, RFIs, Submittals, Change Orders, and other features. By using templates, you can get your next project off the ground quickly without the need to wait for IT to develop a project



management system for you. We also use templates to help businesses set up sites for departments like accounting and marketing.

Workflows

SharePoint is a powerful tool for managing business workflows. A workflow is a process of submitting information for review and approval. There are different types of workflows—serial and dynamic. A serial workflow sends an approval to multiple parties, and each party must approve in a specific order. A dynamic workflow allows an individual to pick whom to send the approval to, and the assignment can change at any time, as needed. A typical workflow in the construction industry is a Request for Information (RFI) and utilizes a dynamic workflow setup. In the VPO template, there is a standard form that collects information that a Contractor would submit to an Architect for clarification. The Contractor can ask the question digitally, and an email notification is automatically sent to the Architect, notifying him or her of the Contractor's question. The Architect can reply with the answer, and another email is then sent back automatically to the Contractor. Alternatively, they could send it on to the Owner to get their input. We call the ownership of the workflow, the Ball-In-Court. This way, you always know who is holding on to the document for approval. You also have a list of RFIs that are visible to anyone within the project, providing transparency and an audit trail of anyone who has touched the RFI.

SharePoint can be used to create any workflow in a company. For instance, you can set up a workflow to allow employees to submit a timesheet for review and approval to their Manager, or an expense report and purchase requisition. The trick is to create the form that collects the information, and then train your team members on the process.

File Sharing

Office 365 is a powerful tool for managing company documents in the Cloud. With Office 365, there are two apps dedicated to file sharing; SharePoint and OneDrive. SharePoint should be used to store, and share, company-related documents. OneDrive should be used to store your own documents that aren't yet ready for sharing. Think of it this way: if you're going to save a document that you're drafting, but you're not yet ready to share it with coworkers, then you typically save it to your Documents folder on your PC. However, this location is not necessarily being backed up, so if your PC crashes, then you'll have lost your documents. If, instead, you save that type of document to OneDrive, then it will be saved both on your PC and online, in the Microsoft Cloud where it's being backed up.

If you're working on a sales proposal—a company document—then you should save the document in SharePoint, in the Sales department site. You can work collaboratively with others on the document, and using the Cloud ensures that it's being backed up. You can sync SharePoint documents with your local device so that you can edit them locally, but they are being synced online and backed up in the Microsoft Cloud.

There are many advantages to storing your documents in the Microsoft Cloud, in SharePoint and OneDrive.

- You can access the documents from anywhere; no VPN connection needed.
- You can sync documents, work offline, and then automatically re-sync online.
- Version history is turned on by default, capturing an instance of every document changed by any user.
- Searching for documents is fast and intuitive; you can use keywords to search not only the title of the document but also the contents of a document.

Task Management

In dealing with customers in the engineering and construction industry for decades, we've learned well that their business success relies heavily on critical-path schedules that can be used for long-term forecasting. Some businesses don't need such a robust planning tool; they need a simple project management tool for communicating goals and deadlines to coworkers, and for getting periodic feedback on the status of those goals.

SharePoint allows you to manage a set of tasks that may belong to a project, a business initiative, or a department. You create the task list as you would in an Excel spreadsheet—which is what many people do. However, it's not easy to see tasks in an Excel spreadsheet. You must open a document to see the tasks, and only one person at a time can edit the task document. When creating a SharePoint task list, you create each task, provide a title, a longer description, a start date, an end date, and whom it's assigned to. It can be as simple as that. Optionally, you can automatically send an email alert to the individual assigned any task. There's no real logic between the tasks; each one can be completed independently of others, keeping it simple to set up. And you can have multiple users editing tasks at the same time. You can also add tasks to a timeline so that others can see a graphical view of the tasks.

You can indent tasks to create summary tasks, and any tasks that are late will automatically change to the color red. It's simple to manage, easy to understand, and transparent for everyone in your organization. There are even apps such as "My Tasks", that's a personal view of tasks assigned to you from all task lists. A great way to keep on top of your assignments across any task list.

Project Online App

Many people don't realize that Microsoft offers a Project Portfolio Management (PPM) system in Office 365. A PPM system allows you to manage your company's projects in a single database. With a PPM system, you can see your company's projects in one view. It's great for team members in management, because they need a bird's eye view of projects' status. This way they can see if a project has an issue, and drill down into the detail of the project plan.

In Office 365, you can subscribe to Project Online, and it will provide the enterprise project infrastructure you need to manage your projects. You don't have to purchase expensive perpetual licenses; you can simply subscribe and pay a monthly fee depending on the type of functionality needed. You can even bundle the desktop version Microsoft Project into your subscription. The advantage is that there's nothing to install in your organization; Microsoft manages the infrastructure in the Cloud for you, and you're always using the latest versions of the software. With Project Online in Office 365, you can manage your projects using a web browser, without having any software installed on your desktop. You have anywhere access to the project data.

If you prefer to use a desktop version of Microsoft Project, you can check out the project from Project Online, modify it, and then check the project back in and publish it to all other users. With Project Online, you can define templates that include a standard Work Breakdown Structure (WBS), tasks with durations and logic, and assigned resources, so that when you need to create a new project, you're not starting with a blank page. You can build intelligence into your project templates, and use them as a starting point, and the solution will build consistencies into your company's project plans no matter who is developing them.

Skype for Business App

A few years ago, Microsoft purchased Skype, a video conferencing leader, and now Microsoft offers Skype for Business as an application within Office 365 as a subscription-based tool. It's included with other apps as a bundle. Not everybody realizes how powerful and useful Skype can be for project management.

First, Skype can be used to host and join web meetings. The pricing model of Skype makes it more reasonable to give to every employee within your office access to host a meeting, rather than a select few like you would with GoToMeeting. This allows for people to connect with team members no matter where they're working from. Skype can also be used as a video feed to share live information from anywhere. Some customers running construction projects use it in the field. The Project Manager and Field Superintendent can use the Skype mobile app on their smartphone or tablet and show a live video feed of a problem at the job site to someone sitting in an office.

Shared Mailbox

Today there are so many email messages that go back and forth on a project. It's difficult to track down correspondence, and once you do, it's hard to be confident that you're reading the latest thread in the conversation or opening the latest attachment. In Office 365, there is a feature called a Shared Mailbox that allows you to set up an email address that's unique for your project. When sending an email message to your project team, you can simply Cc the project email address, and the correspondence is automatically collected in the project's mailbox. You can also forward to that address any email related to the project. You can assign team members to the mailbox who can see the project mailbox in Outlook, next to their own mailbox. You can search for any correspondence just like you can with your Outlook inbox.

Office 365 is a great project management tool for any business. Since so many are already using Office 365 it makes great business sense to leverage your investment in Office 365 by taking advantage of all the available tools and apps. *If you need help or would like to discuss any of these project workflows you can reach out to our team at Computer Dimensions (520) 743-7554 today.*

