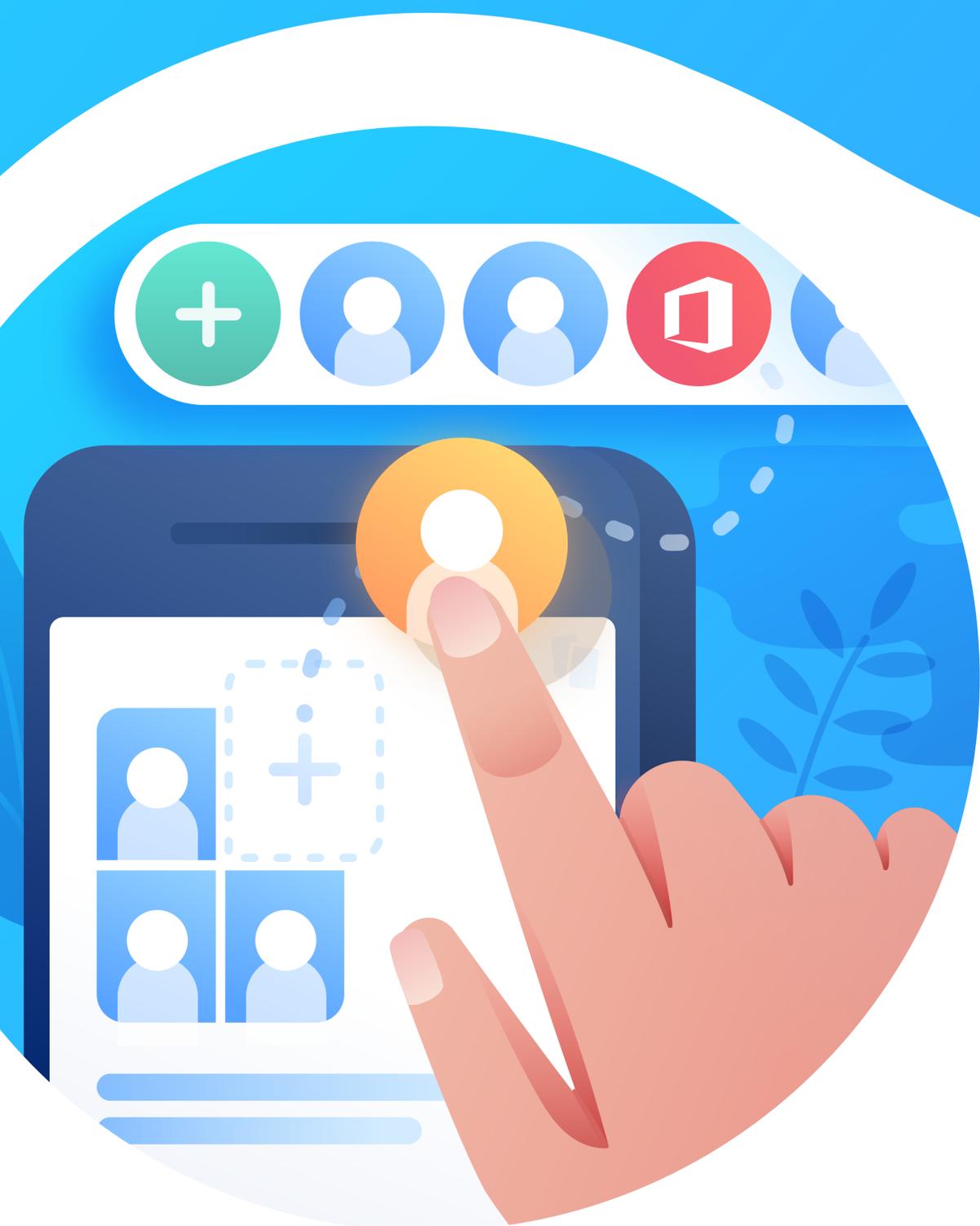


# The Must Have Guide to Office 365 Project Management



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## Overview

This comprehensive guide will help you navigate your way simply through the world of Office 365 project management tools and select the most relevant available software you should integrate with.

## About Project Central

Project Central is a simple, online project management tool for teams using Office 365. It's fast, beautiful and easy to use.

Sign up for free!



[www.projectcentral.com](http://www.projectcentral.com)

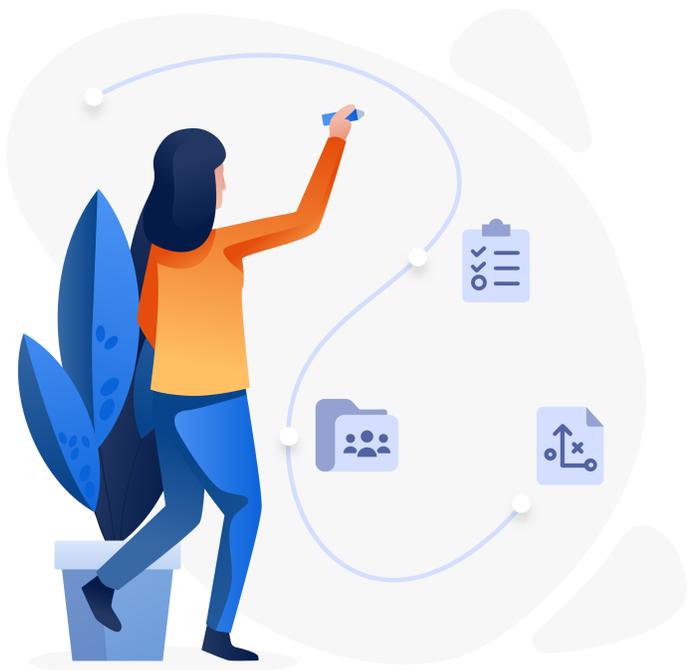


## Are We All Projects Managers Today?

Not all of us are project managers, but that doesn't mean we don't have to manage projects on the daily. Let's think about our job descriptions. Chances are, we have teams that juggle a vast number of tasks, and we're the ones helping them organize, meet deadlines, all of which should result in an improved bottom line by the end of the year.

This definition doesn't change even if we're small business owners, either. There's a lot to keep track of, and we find ourselves filling project managers' shoes to help our teams do the best they can. And our jobs are changing, too, meaning that higher-ups want us to get new skills but we can't micromanage or write down to-do lists. We need professional help.

We need software that'll help us. In this guide, we'll show you how you can help your team perform better by managing projects with Office 365. And if you're wondering how to use Office 365 for project management along with the best tools to integrate with Office 365, we'll cover that, too.



## Task Management vs Project Management vs Process Management

Before we get into the details of managing projects with Office 365, it's crucial to understand the new demands of our jobs. Terms “task management,” “project management,” and “process management” are often thrown around. Now, those are pretty hard to distinguish if all we want to do is perform our jobs to the best of our abilities and get results at the end of the day, but they play a significant role in choosing a project management software for our team.

### **Let's imagine our team's project is getting to the North Pole**

Tasks are the individual steps we have to take to get there. They're tiny objectives, items on a to-do list that's titled “Project North Pole.” If getting there is the project, it's the title of the to-do list, and tasks are items on it.

Project management means making sure that everything is going according to the schedule, and breaking up that immense feat into a number of tasks.

With project management, we'll get to the North Pole. But only if our task management is on par for the course, as well.

And that's where project tracking comes into play.

There's bound to be obstacles on our way to the North Pole (or your way to improving the results of your department), which is why we use project tracking.

Project tracking helps us identify issues on time and take action that's going to set us straight again. This means we have to measure performance, handle different files, and manage people. That, as we all know, isn't such an easy task.

Simple project management software like Office 365 makes all of that easier. It's designed with different projects in mind, so Office 365 makes project managers' jobs much, much easier.

With this software, our team for the North Pole expedition may contain thousands of tasks (or just ten) and hundreds of people (or just five), and we'll still be able to efficiently manage the project.

## **What about process management with Office 365?**

Now we're getting to the thick of it. Let's imagine our team successfully got to the North Pole. We've checked off all the tasks on the list, the project is completed, but now we're ambitious.

Now we want to go to the South Pole. We've obviously done something right with our expedition to the North Pole. But what?

**Without process management, it's impossible to replicate the success we've achieved with previous projects.** We know we ticked off the tasks and action items, but *how* did we do it?

Process management ties it all together. Especially if you have a tool that integrates with Office 365 that visualizes the information that brought you the success, and helps you replicate it. Again and again.

## **Which Software Do You Need for Project Management?**

Just like there's a difference between the three key terms: project management, task management, and process management, there are differences between software you can use for them.

Tasks are by nature smaller chunks of a project, so task management software focuses on:

- Speed
- Dates of start and completion
- Delegation

Task management software has very little process management capabilities, as it is oriented towards getting to the goal as soon as possible.

Process management software, on the other hand, focuses on aspects such as:

- Metrics
- Systems
- People
- Files

The goal here is replicating the success, so process management software feeds on data. However, it may be too much data to handle, especially if you're not a process or a project manager. It's easy to lose track of what really matters.

Finally, project management software can be an all-encompassing solution. It handles data such as:

- Project plans
- Schedules
- Budgets
- Collaboration

Project management software is great for project managers who go from projects such as launching cars into space to creating new user experience for visitors of an ecommerce store.

However, **most of us just need an efficient way to manage our teams.** And none of the available software works the way it should. It either gives us too few features, or too many.

How's a manager (and an unwilling project manager) to keep track without losing their mind?



## Task Management Using Office 365

When we compare all the pros and cons, project management software definitely wins the battle between different software. So the next question is natural:

**What's the best suite of project management tools? Office 365.**



As a project management tool, Office 365 offers both task management and project tracking, giving us everything we need to understand the processes that led to the successes of our teams.

Office 365 task management perks include:

# 1. Visual task management

We process visual stimuli differently; 60,000x faster than text. This is especially helpful for teams that process a huge amount of data. Just naming the documents and not understanding the correlation of data at a first glance isn't going to be very effective.

Presenting it visually, on the other hand, makes things a lot easier. That (and a few other neat things) is what Microsoft understood with Office 365 project management app, Microsoft Planner.

## What is Microsoft Planner?

Planner is an app that helps teams create boards where tasks are organized into buckets.



If you're wondering how to use Microsoft Planner, it's simple: team members can quite literally take tasks and drop them into corresponding buckets.

Managers can delegate tasks between team members.

It's also very easy to keep track of project progress, too. Especially with an app that integrates with Office 365 like Project Central that shows you a broader scope of your project with visual dashboards.

## 2. Task Completion

There can be a lot of tasks within a single project, so it's important to see how our teams are performing and if there's something we can help them with.

Again, Microsoft Planner uses task management features such as: task completion, charts, and milestones. We can mark tasks as not started, in progress or completed. We can even add task details and checklists to help us get there faster.

With a tool like Project Central, you can get even more functionality from features such as: project health, completion and project status.

## 3. Collaboration

Office 365's motto is: "Work together without chaos," and that's exactly what it provides. Microsoft Planner has supreme transparency features, meaning that team members know exactly who's working on what.

Team members can attach files, images or links to every task in Planner. This is especially useful if we have the Office 365 suite with SharePoint.

We can also leave comments and discuss tasks with other team members, meaning that information sharing is streamlined and much, much easier than with clunky software that half of our team doesn't even need to know how to use.

## 4. Stakeholder Reporting

Stakeholders or external associates who aren't required to access the project 24/7 can be granted Guest Access in Office 365. This feature is especially useful for managers who need to report to stakeholders as Office 365 makes results and progress visible.

## 5. Tracking Progress

Process management is incredibly important, and it can be easily done within Microsoft Planner. We can see charts of our plan's progress according to factors such as:

- Due date
- Workload

The workload charts are especially useful when it comes to delegating tasks. It's easy to keep a project on track if we know who's overloaded, and who can take on new tasks.

## How Can I Use Microsoft Planner for Task and Project Management?

It only takes 5 steps to set up Microsoft Planner and help our teams succeed:

1. Sign in or sign up for Microsoft Planner or Office 365.
2. Create a plan (e.g. UX redesign)
3. Add tasks and mark them with dates and/or labels
4. Create buckets and sort tasks into them (e.g. visual branding, wireframes)
5. Assign team members to tasks

If you need more functionality and a more advanced dashboard that'll clearly show you your team's results, take a look at Project Central. Our Office 365 integration makes project management even easier.

## **Should My Team Use Microsoft Planner for Task Management?**

While most teams can use Microsoft Planner due to its agility and flexibility, best use cases include:

### **1. Issue Management**

Buckets can be set for new issues, pending issues, resolved issues, etc. Due to its flexibility, Planner is great for cross-functional tasks where one team member needs more help from other team members.

### **2. Review Management**

Planner can be very useful for publications, as well, who can sort submissions according to: New submissions, pending submissions, accepted, rejected.

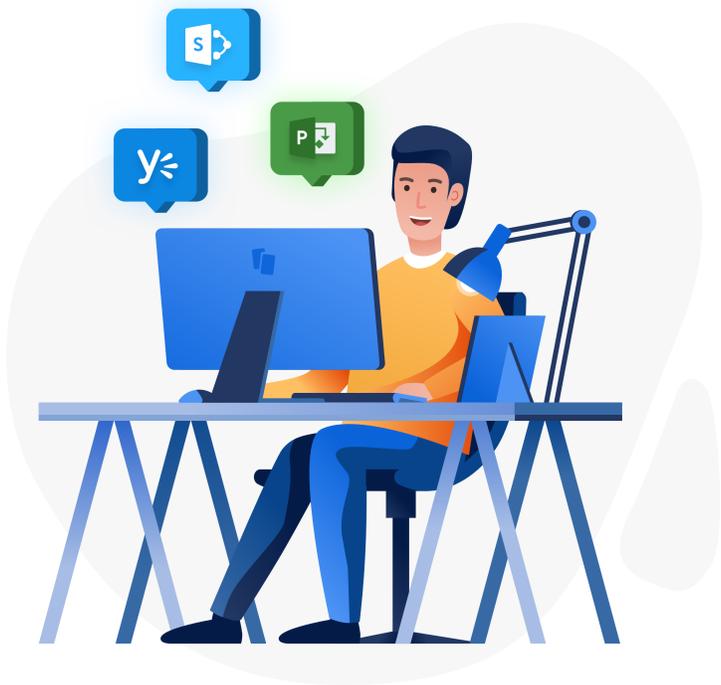
### **3. Communication Management**

Finally, Microsoft Teams and the Office 365 suite has been very useful for businesses who wanted to consolidate different tools, reduce email noise, and keep track of tasks and correspondence.

After migrating to Teams for project management and using Planner among other tools Microsoft offers, they've noticed:

- Instead of emailing meeting agendas, they could add them to Planner or share a message with everyone on the team and reduce email noise.
- Instead of emailing Excel attachments and asking every team member to add their numbers, they could @mention relevant people and use one sheet to consolidate results and collaborate. This reduced the need for version control.
- Instead of creating to-do lists and manually sending them to relevant people, they started adding tasks to the Planner and assigning them. This made it easier for team members and managers to keep track of assigned tasks.

Planner may be a lightweight solution, but as a Microsoft Office 365 project management tool, it certainly does the trick – at whichever scale you need it to.



## Using Office 365 Project Management Tools

In addition to its task management capabilities, Office 365 is very effective at project management. Especially when its core functionality is empowered with Project Central.

Office 365 Project Online perks include:

### 1. Project planning and scheduling

The most robust tool for Office 365 project portfolio management is definitely Project Online.

## What is Project Online for Office 365?

Project Online is the best tool for project management using Office 365. It's a tool built by the pros for the pros, and those who need more advanced project management software features. We'll cover all the advantages of Project Online to help you decide if it's the right tool for you.

It does require some skill, but if we decide to dive in, it'll be worth our while. Project Online offers multiple timelines view if you need project portfolio management from Office 365.

Even though projects can get complex at times, Project Online simplifies them so they're easy to understand.

Office 365 project management software Project Online also offers Gantt charts for scheduling. They're a pretty common tool so Microsoft isn't reinventing anything – it's just making it better.

Visualization is present with this tool, as well. Gantt charts are used for task path highlighting to understand task dependencies and which tasks will get us towards our finish line fastest.

## **2. Automation and optimization**

Automation is particularly useful if we're managing a big project (or multiple projects) with a lot of team members. Automation helps fill out start and end dates based on dependencies, so once we set up our project, we can let the software calculate the dates for us.

Additionally, Project Online also has the Task Inspector feature. This feature allows us to reallocate tasks and resources. And since we know project management can require a lot of check-in points for rearranging resources and re-delegating tasks, this is a breath of fresh air that gives us all the flexibility we need.

### **3. If worse comes to worst...**

Office 365 really is at the forefront of daily project management revolution, so it has features helping us imagine and resolve the worst-case scenarios in the blink of an eye.

Project Online calls this feature What-if planning. Tasks can be set to “inactive,” and we can run what-if scenarios to determine the best fit reassignments, and allocate resources accordingly. Without having to start all over again.

When it comes to identifying and resolving potential issues with resources, Team Planner helps find pain points within our project and solve them with better resource allocation.

### **4. What about reporting?**

Even though Project Online is a great tool, you'll need an integration for simple reporting. Project Online is best used by project managers, although its features make it useful even for those of us who've no intention of becoming professionals.

This is where integrations come in: Project Central integrates with Office 365 in a simple and secure way, and creates an omni-channel dashboard so you can keep track of all your projects and manage the process efficiently.

## **How Can I Use Project Online for Project Management?**

Project Online can be accessed through one of three distinct plans. We can choose between cloud services and on-premise solutions. The plans start at \$7/user/month.

## **Should My Team Use Project Online for Project Management?**

Project Online is a great tool (although not without its disadvantages), but best use cases of this Office 365 project management software include:

### **1. Efficiently scaling projects**

Devollo is a big company that's been using Microsoft Excel spreadsheets to manage their projects.

With their growth and an increasing emphasis put on project management within various departments of their company, they needed a more centralized and comprehensive solution.

In addition to that, they also wanted to understand the big picture behind their project(s) and allocate human resources and workloads better.

## **Devolvo felt the following Office 365 project management benefits:**

- Communication, productivity and travel cost benefits. There was no need for emails, pop-up notifications and other forms of communication. Relevant parties could access necessary information within Project Online and communicate with one another.
- Project Online helped them identify and plan for each project's requirements, which helped them avoid over-engineering costs.
- Hilti's employees increased productivity and spent less time searching for information.
- As a growing company, Devolo experienced resource management benefits due to using Project Online. It was easy to set up standardized project templates, accurately allocate resources, and scale it as necessary.

## **2. Increasing management visibility**

Arup is an engineering company whose stakeholders wanted to be included in the projects and be able to observe progress as it takes place. They needed a better solution for giving relevant parties an insight into project health, as well as brainstorming ideas and collaborating on high-level projects.

Additionally, Arup's IT department relied on Excel and Word project status reporting.

This meant a lot of diverse reporting styles, and a version control process that caused a lot of headaches for contributors, managers, and stakeholders.

## **Once Arup implemented Project Online as a part of their Office 365 project management tools, they noted benefits such as:**

- Instant insight into global project status. Arup's team no longer has to spend 40 hours a month manually creating reports to keep everyone up to date on project progress. They're avoiding duplication of effort and increasing productivity by using Project Online.
- Project Online supports their project delivery framework. Managers are able to understand complex projects at a glance, and make sure everything is delivered on time. They can forecast problems before they've occurred and allocate resources and workload more efficiently.
- Arup uses Project Online as an ideation platform. Project contributors create the project, and the details are sent to management through the software for review and approval. This saves a lot of time, while providing stakeholders with the transparency they need.
- It's a one-stop-shop solution. Arup's teams can select, create, launch, manage and track projects from one platform.

Project Online is an advanced solution, but it's a great one for teams managing multiple projects. If your team is growing and you need a scalable solution that provides all relevant parties (contributors, managers and stakeholders) with information and insight into various projects, Project Online is a great Office 365 project management tool for you. There is a learning curve but with integrations like Project Central, project management with Office 365 becomes a piece of cake.

# SharePoint for Office 365 Project Management

Planner is simple, Project Online is advanced, and we may be needing a project management solution that's somewhere in the middle.

And there lies the brilliance of SharePoint Online for project management, teams who need to get the work done, and managers who'll have way less headaches from now on.

## What is SharePoint for Office 365?

SharePoint is a web collaboration and document management tool from Office 365's range of products. It's highly customizable and can adapt to the way diverse teams work.

SharePoint project management perks include:

### 1. Sharing and Collaboration

Where we thought Project Online may be just a tad too much, and Planner too little, SharePoint meets us in the middle. SharePoint allows us to create intranets and places where team members can share news, updates, and collaborate on content.

### 2. Connecting

We can share resources necessary for teamwork such as files and applications with team members, and share updates.

### **3. Automation**

SharePoint is also a good process management software, as it allows us to automate the way we work with workflows and alerts.

### **4. Task Lists**

SharePoint Task Lists are one of the main project management features of this Office 365 product. Users can create lists comprised of tasks and subtasks, and display them on a project timeline. For most teams, this is enough to properly manage a project.

Additionally, Task Lists also have features that allow users to assign resources, get various project views (late tasks, Gantt charts, etc.).

However, the limits are clear: reporting is pretty hard to automate without additional tools or integrations. It's also very hard for most teams with very little IT-proclivity to customize SharePoint and add multiple project timelines.

### **5. Project Sites**

For those of us who are more ambitious, SharePoint project sites may be a better solution. Each SharePoint project site is the central hub for our projects. Users can add task lists for to-do items, deadlines, and calendars to stay on track. Different team members can collaborate on the documents, and SharePoint project sites can also be integrated with Project Online.

One big perk is the Office 365 SharePoint project management template.

This allows users to integrate the project site with their website's homepage. Each user can choose from premade templates or create their own to use for future projects, as well.

## **How Can I Use SharePoint for Project Management?**

If you're already using Office 365, chances are you may already have free access to it. However, you can compare your plans here.

The main disadvantage of SharePoint for project management is its lack of reporting features (which is consistent across Office 365 platforms), but it's still one of the most flexible solutions – regardless of your project management needs.

That's why it's good to look into integrations. Project Central syncs seamlessly with your SharePoint account and creates visual dashboards you can use to track the success of your project.

You can even use it for reporting to stakeholders as the data is presented in a clear and understandable manner.

## **Should My Team Use SharePoint for Project Management?**

SharePoint is a great option for teams that want to keep everything under one roof.

## **Should My Team Use SharePoint for Project Management?**

The project sites are a great and simple addition to company websites users may be using on the daily as it is, so if that's the case, using SharePoint for project management doesn't even require tech culture changes.

However, a developer may be needed to fully integrated SharePoint with the company website.

### **The best use cases for project management with Office 365 SharePoint include:**

#### **1. Teams requiring flexibility**

There's no better software than SharePoint for teams who need flexible project management. Since it's already included in the Office 365 plan, it's widely available to most companies (and it's used by most of them).

It's easy to customize and the learning curve can be avoided because it adapts to the team's needs.

#### **2. Companies who need a corporate intranet**

If a team needs to be able to manage a project efficiently, but also has higher-ups to report to, SharePoint is a great software.

For example, Campana & Schott use SharePoint to manage their entire business. When they first undertook their project management redesign, they needed a solution that would be easy to implement and even easier to manage.

After integrating this Office 365 project management solution, C & S noted benefits such as:

- Visible information is tailored according to permissions. Contributors view information relevant to them, and stakeholders view information relevant to them. There's no information overload, and everyone's able to find the information they're looking for in less time than before.
- Emails are stored onto the SharePoint site, meaning that everyone can be on the same page – even if some things were discussed through email, and not company or project-wide.
- Risk and issue logs are created and updated through SharePoint. This avoids confusion with version control – everyone stays up to date, and has the latest information.
- Dynamic search helps team members find relevant documents in SharePoint. Word docs are automatically stored in it and there's no need for complicated categorizations.
- Forms for uploading relevant data – from project requests to project reports. Individuals still had the freedom to choose tools they saw fit, but all reports were stored in a central hub that the SharePoint project site became.

While robust, SharePoint is a good tool to add-on to. It can follow the way teams and their project management tools develop and just like other Office 365 project management tools, it has a variety of useful integrations.

For more functionality, managers who want to manage projects without becoming full-fledged project managers can also consider Office 365 integrations that make the technicality of SharePoint simple and sleek to navigate.

## **Yammer for Project Management**

One of the common questions we get is: can Yammer be used for project management?



A daughter company of Microsoft, it's free with Office 365, and it's modeled after social networks rather than project management software (unlike the rest of Office 365 tools).

The answer is: yes, but...

Yammer is very neat, its UI is sleek and it looks like something a lot of project managers at startups would use.

However, it's not a very scalable solution so unless we're exclusively looking for collaborative features, it can't be compared to solutions like Project Online or SharePoint.

## **Key Yammer features that can be used for project management include:**

- Collaboration across the organization
- Visual presentation
- Adding documents and images to projects

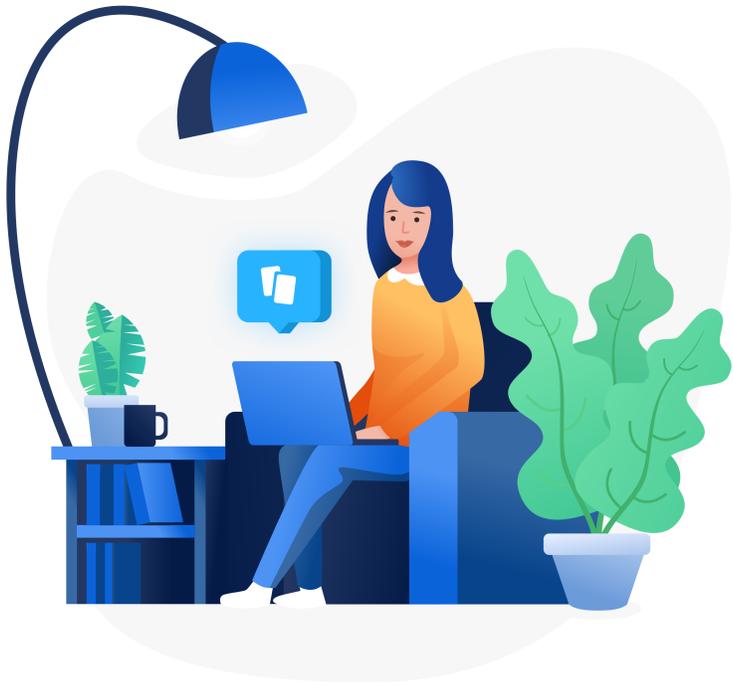
Since it's free, it may be a good starting point for organizations who are prone to solutions which aren't just agile – but look the part. When integrated with other Office 365 tools, Yammer may have a project management potential from a purely human standpoint: its interface is similar to Facebook's. Our team members may just feel right at home.

## **What about Other Office 365 Project Management Software?**

There are a lot of options if you want to manage projects with Office 365. They include a lot of great tools like simple To-Do lists, and even Microsoft Flow for automation.

However, it's important to remember that you should work together with your team to find the perfect fit. Additionally, keep your future needs in mind – not just your current ones. Microsoft is constantly expanding its Office 365 offer, so it's not surprising that a growing number of teams needing to manage projects turn to Office 365 before even considering other solutions.

To put it simply, Microsoft understands what users need out of it, and it provides consistently. However, Office 365 has its limits when it comes to project management.



## Redefining the Role of Project Management with Office 365 Integrations

When we're talking about Microsoft Office 365 project management, we can't forget about data. After all, it's what fuels our old allegory: our expedition to the North Pole. We need to know how many miles we'll walk, and how much food we'll need.

And then we need to be able to replicate it again.

That's the situation with project management today. We may not be project managers hopping from one project to another, but there are micro-projects we're running at our companies every day.

And to be able to understand our success and craft better project management solutions for the future, we need access to data at scale. That's what Microsoft Graph Data Connect does.

Most Microsoft integrations have been made with Azure – the platform for developers. Azure is safe and secure, making it the perfect platform for us to develop Project Central with.

**We've used (and we swear by) Office 365, but we've had to face the facts: it's not good enough on its own.**

And to be able to provide you with better solutions in the future, all the while keeping your company data exclusive to you (and only you), we've developed Project Central.

Our Office 365 integration gives you more control over your projects and performance. Project Central tells you exactly how many miles you've walked to the North Pole, and then helps you do it again. You can monitor the status of your project(s) across multiple tasks, reach your goals and visualize your initiatives.

If something is a risk and requires you to address it, Project Central will be the first to tell you:

Hey, if things don't change, we may not reach the North Pole any time soon.

You get all the information you need, thanks to our collaboration with the best of Office 365 project management and Microsoft Azure security.

**Your data stays in your hands, and you can use it at a scale that'll help you improve in the future.**

You can keep working with the Office 365 tools you love, but you can make use of Project Central's full functionality – from assigning tasks to reallocating resources and keeping an eye on the progress.

No matter the size of your project or your organization, project management is necessary. But it doesn't have to be complicated.

Just plug into Project Central and watch the magic happen.



If you use Office 365 in your company, Project Central is the integrated solution for managing your projects with Office 365.

[Sign Up For a Free Trial Today!](#)





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