

WHITE PAPER

omnia

How to Handle Project and Portfolio Management in Microsoft 365.

Use your Microsoft 365 and Omnia to implement project management solutions that drive effectiveness.

The way we work is constantly changing. One trend that has remained for many years, is that more and more work is conducted by a virtual team in the form of a project.

For many companies and their people, collaboration platforms such as Slack and Microsoft Teams have overtaken email for internal communications and more.

Yet, these platforms often do not fully support project management needs and requirements. This includes defining and working with best practices, handling templates, project governance, and providing a relevant portfolio overview and project information.

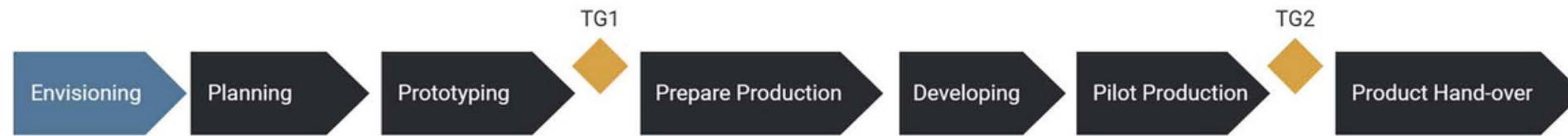
In this whitepaper, we will provide examples of a project and portfolio management solution, seamlessly integrated with your intranet, using Microsoft 365 and Omnia.

CONTENTS

- Project Model
- Project Center Start
- Create a New Project
- Project Progress in Teams
- Tasks and Planner Boards
- Project Portfolio
- Project Information
- Project Documents
- Learn More



Project Model



Project managers will recognize this project model and process.

Effective project management will define, visualize, and publish a project model. This includes the project phases, descriptions, documents, templates, tools, and tasks that should be used when working on a project.

In this product development example, the project model includes a description and tabs for viewing documents/templates, and links to project-related tools and applications.

DESCRIPTION

DOCUMENTS

LINKS

TASKS

The Envisioning phase of a product development project covers several activities that are vital for launching a successful product. Three of these activities are fusce posuere, sales and marketing, and magna sed pulvinar and internal communication.

Process scope

The Envisioning Phase covers the following stages:

1. Idea Generation
2. Idea Screening
3. Concept Development & Testing
4. Value Proposition Chart

The Develop Product Process starts with an Envisioning phase that should be conducted as described in this section. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna a small change at a webinar. A small change.

Input

The input to this process are the following items:



Examples From a Project Management Solution in M365.

In the example solution shown in this whitepaper, we have set up a Project Center within the intranet. This can be reached via the mega menu or more of a stand-alone solution via some other type of navigation (banner, link, etc.).

Within the project center, the end user can access:

- one or several project models
- a project portfolio showing ongoing and completed projects
- more information about the projects and delivery documents completed within the projects as in the image below.

Project Center Start

In this solution, you can define, visualize, and publish a project model including:

- project phases
- connecting descriptions
- documents
- templates
- tools
- tasks

The handling of the project models, documents, and templates can be set up aligned with business requirements regarding approval, review, and archiving workflows.

Create a New Project

← Create Teamwork ×

✓ Select template — ✓ Information — 3 Properties — 4 Participants — 5 Summary

Project Number
74483

Unique project number from the ERP system.

Project Name
Project Halo

Project Type*
Product Developmen... ×

Project Sponsor
Product Developmen... ×

The department that is the primary sponsor of the project.

Project Manager*
Robert Johnson ×

Project Status
Ongoing ×

Project Start Date
2022-08-19

The estimated project start date.

Project End Date
2023-11-01

The estimated project end date.

Project Model
6 Develop Product ×

← PREVIOUS NEXT →

Creating a new project can also be configured to match your organization's business requirements.

Typical examples can be:

- rules regarding project name, description, and project number
- implementing properties such as project type, sponsor, and manager
- choosing what model the project will follow and setting the start and end dates

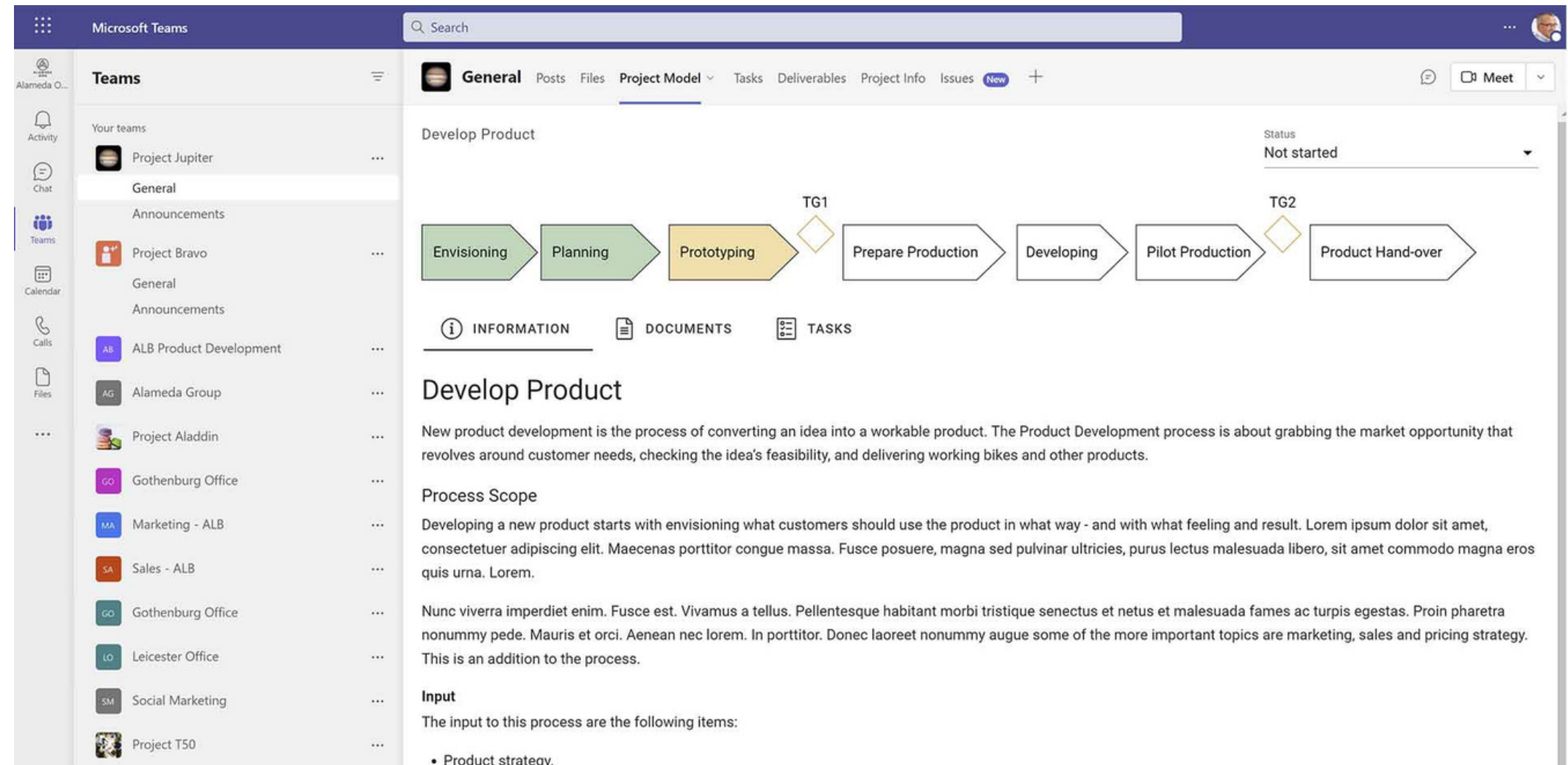
An example of the creation process is shown here.

Project Progress in Microsoft Teams

You can also use Omnia to orchestrate the various Microsoft 365 resources, and Omnia features that you want to make available for projects.

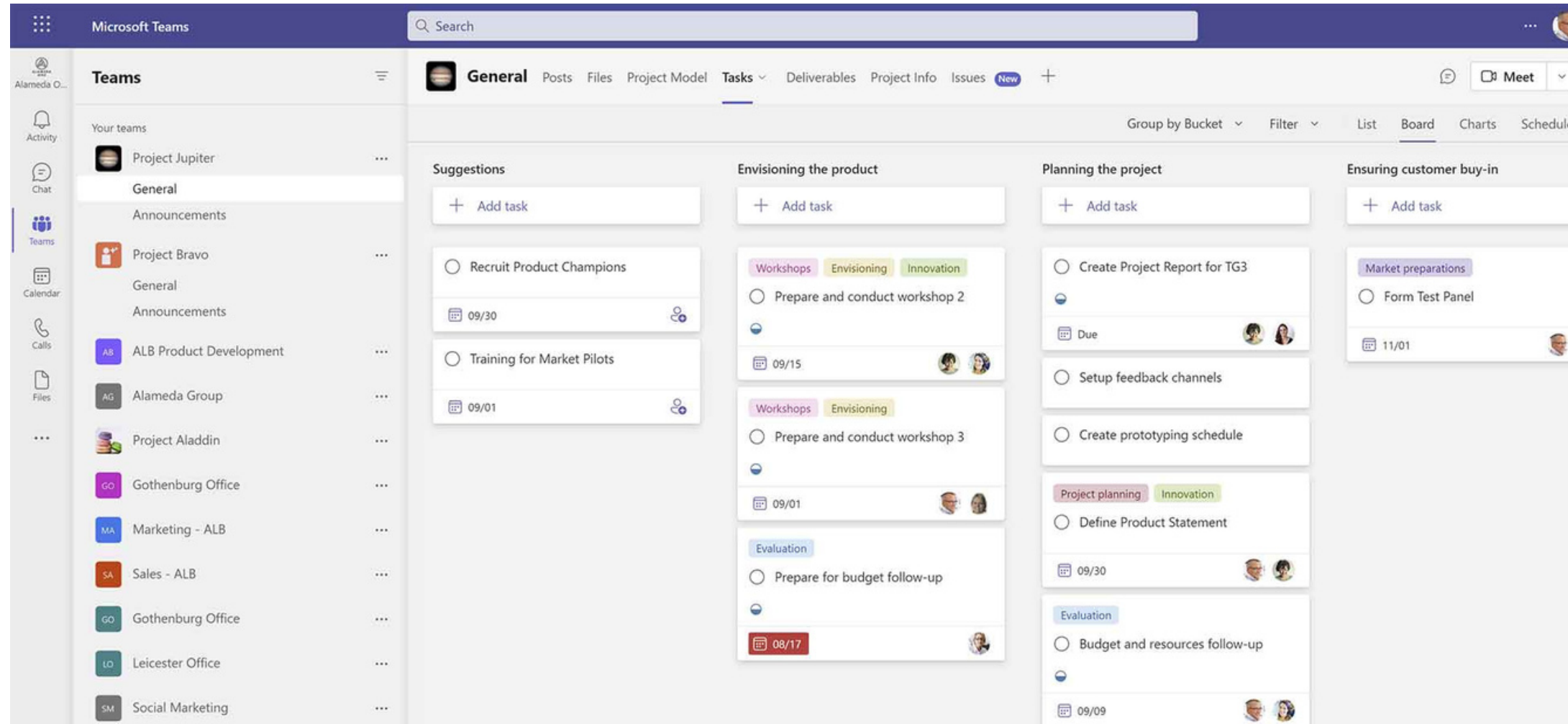
The most common need within this area is to set up the project for collaboration in Microsoft Teams. This is done with conversations and file sharing.

Or you can add other tabs during the creation process to align the collaboration area with business requirements.



Each project should hold an instance of the project model. This allows for easy access to information about best practices and for showing project progress. Project phases set as not started, ongoing, completed, and more can be reflected using color coding as shown above.

Tasks and Planner Boards



In this example, we have also included delivery documents and project information as tabs in the project template in Teams.

The former is used for handling controlled and important business documents.

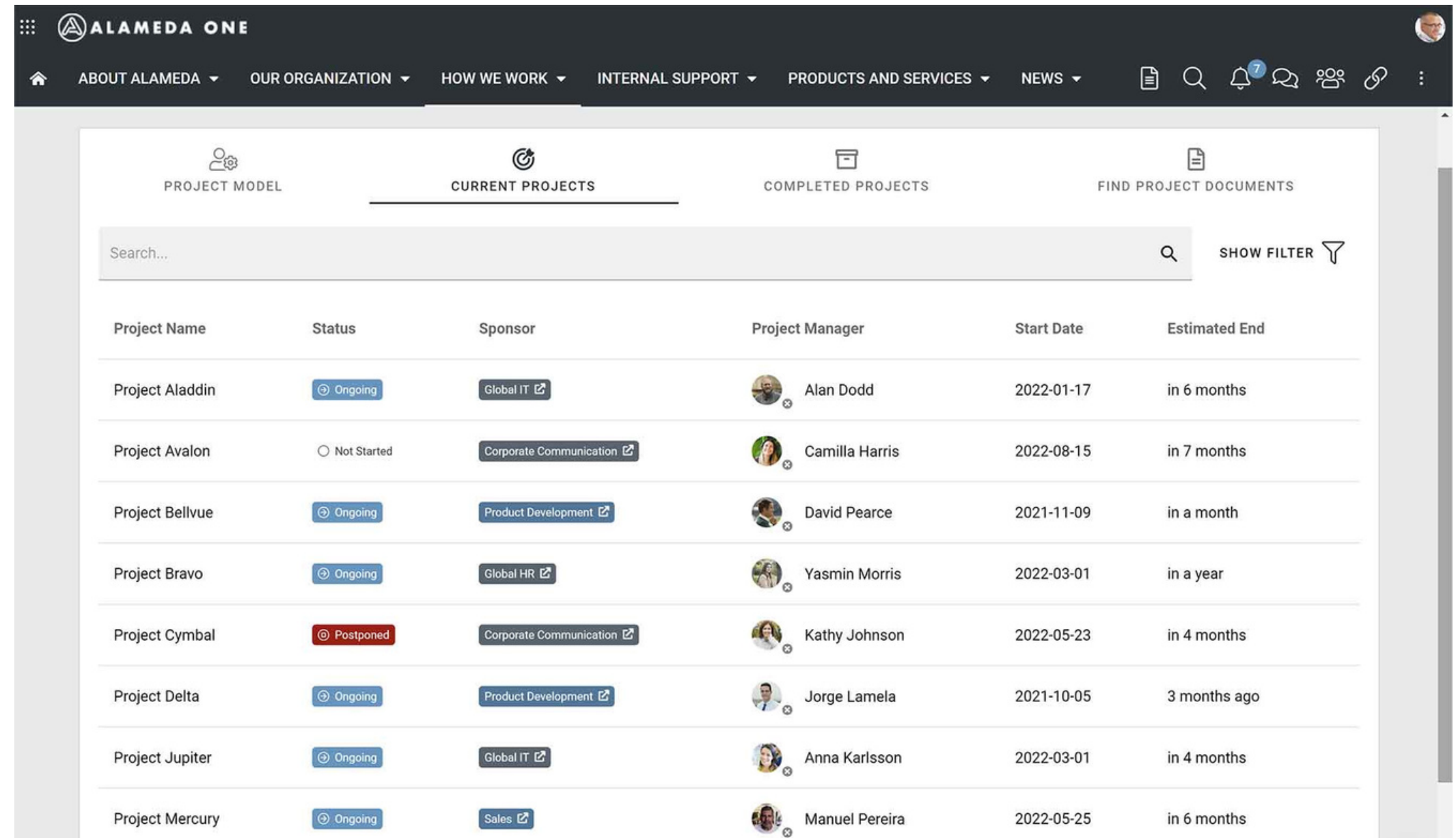
At the same time, the latter is a page providing information about the project to any (internal) end-user.

Another popular integration between the project model and Teams is that any project tasks can be imported to a Planner Board displayed as a tab.

Project Portfolio

We can now navigate back to the Project Center to discover the portfolio view of all ongoing and/or completed projects.

The portfolio view can be configured to match any properties or aspects important to your organization.



The screenshot displays the 'ALAMEDA ONE' Project Center interface. The 'CURRENT PROJECTS' tab is selected, showing a table of projects. The table includes columns for Project Name, Status, Sponsor, Project Manager, Start Date, and Estimated End. The projects listed are Project Aladdin, Project Avalon, Project Bellvue, Project Bravo, Project Cymbal, Project Delta, Project Jupiter, and Project Mercury.

Project Name	Status	Sponsor	Project Manager	Start Date	Estimated End
Project Aladdin	Ongoing	Global IT	Alan Dodd	2022-01-17	in 6 months
Project Avalon	Not Started	Corporate Communication	Camilla Harris	2022-08-15	in 7 months
Project Bellvue	Ongoing	Product Development	David Pearce	2021-11-09	in a month
Project Bravo	Ongoing	Global HR	Yasmin Morris	2022-03-01	in a year
Project Cymbal	Postponed	Corporate Communication	Kathy Johnson	2022-05-23	in 4 months
Project Delta	Ongoing	Product Development	Jorge Lamela	2021-10-05	3 months ago
Project Jupiter	Ongoing	Global IT	Anna Karlsson	2022-03-01	in 4 months
Project Mercury	Ongoing	Sales	Manuel Pereira	2022-05-25	in 6 months

Project Information

The screenshot shows a web interface for 'ALAMEDA ONE'. The navigation bar includes links for 'ABOUT ALAMEDA', 'OUR ORGANIZATION', 'HOW WE WORK', 'INTERNAL SUPPORT', 'PRODUCTS AND SERVICES', and 'NEWS'. The main content area is titled 'Project Jupiter' and features a moon image. The project description states: 'The goal for Project Jupiter is to build the best City Bike ever and to launch it in Q1 2023, driving our sales for years to come.' Below this, there are sections for 'Project scope' and 'Planned delivery'. The 'Project Information' sidebar on the right lists: 'Ongoing' status, 'Project Type: Business Improvement', 'Project Sponsor: Global IT', 'Project Manager: Anna Karlsson', 'Project Start Date: 2022-03-01', and 'Project End Date: 2022-12-16'. The 'Project Documents' section shows a document titled 'Project Jupiter - Project Directive'.

Project Jupiter

The goal for Project Jupiter is to build the best City Bike ever and to launch it in Q1 2023, driving our sales for years to come.

The City Bikes market is sky-rocketing and the vision for Alameda Bikes is to be the market leader, with high-value bikes and super happy customers. The Jupiter Project will be key to achieving that!

Project scope

The scope for Project Jupiter is tempor nec magna sed dignissim. Sed hendrerit, lorem and could be non congue varius, nibh arcu ornare nisi, at accumsan lacus nisl nec velit. That was once seen varius natoque penatibus et magnis dis parturient montes, by biking and hiking nascetur ridiculus mus. Etiam dapibus diam et porttitor tincidunt.

Let's face it, donec scelerisque risus eu ex cursus rutrum. Pellentesque at ulla corper is the true elit. Morbi lacus neque, vehicula ac urna nec, consectetur ultrices lex.

Planned delivery

We are looking forward to ultrices, nibh a vestibulum scelerisque, mauris diam sodales during autumn purus, vel tincidunt eros nulla quis augue.

- A great product sed vitae eleifend nisi.
- A marketing leading dictum ex in leo rhoncus.
- Detailed documentation and at quis porta mi fermentum.
- Market tests showing id mattis felis, at molestie metus.

The most vivamus diam odio, ultricies et ligula at, ullamcorper scelerisque elit. Proin are perhaps not risus nisl, tincidunt non nisl et, suscipit ullamcorper ligula. Proin quis nunc but we do sit amet tellus molestie egestas eget ac ipsum.

Project Information

Ongoing

Project Type
Business Improvement

Project Sponsor
Global IT

Project Manager
Anna Karlsson

Project Start Date
2022-03-01

Project End Date
2022-12-16

Project Documents

Project Jupiter - Project Directive

When clicking on one of the projects, users will come to the project information.

Here the project team will be responsible for providing information on their work and can also attach relevant documents.

Project Documents

Finally, in the Project Center, use a tab to "Find Project Documents."

This is used to find documents from previous projects. For example, users may want to find a previous business report from an IT project, before you start producing a similar document within your project.

Of course, a good search feature with relevant refiners is also available in this section.

The screenshot shows the 'ALAMEDA ONE' Project Center interface. The 'FIND PROJECT DOCUMENTS' tab is active. The left sidebar contains filters for Document Type, Project Type, and Team. The main content area displays a table of documents.

Title	Document Type	Published	Document Owner
Project Avalon - Business Report TG 3	Project Report	a year ago	Robert Johnson
Project Report TG 1	Project Report	2 months ago	Robert Johnson
Project Bravo TG1 report	Project Report	2 months ago	Robert Johnson
Avalon 2021 Q1 Report	Project Report	a year ago	Anna Karlsson
Envisioning Statement	Project Report	2 months ago	Robert Johnson
Project Aladdin - Steering Group Report MS1	Project Report	2 years ago	Rolf Hultberg
Learnings from Workshops.pptx	Project Report	2 years ago	Robert Johnson

Learn More About Omnia and Project Management.

To learn more about how Omnia can support your organization when it comes to project and portfolio management, we recommend the following links:

- On-demand Webinar: [A Best Practice for Project Management in Microsoft 365](#)
- On-demand webinar: [Effective Project Management](#)
- Case Study: [NCC Property Development Drives Efficiency with a Solution for Project and Process Management](#)





Empower your employees with our award-winning intranet platform.

Omnia is helping companies everywhere, across industries improve internal collaboration, productivity and employee engagement.

Visit our website to learn more about our Omnia product and features, and access a range of knowledge resources or **request a product demo**.



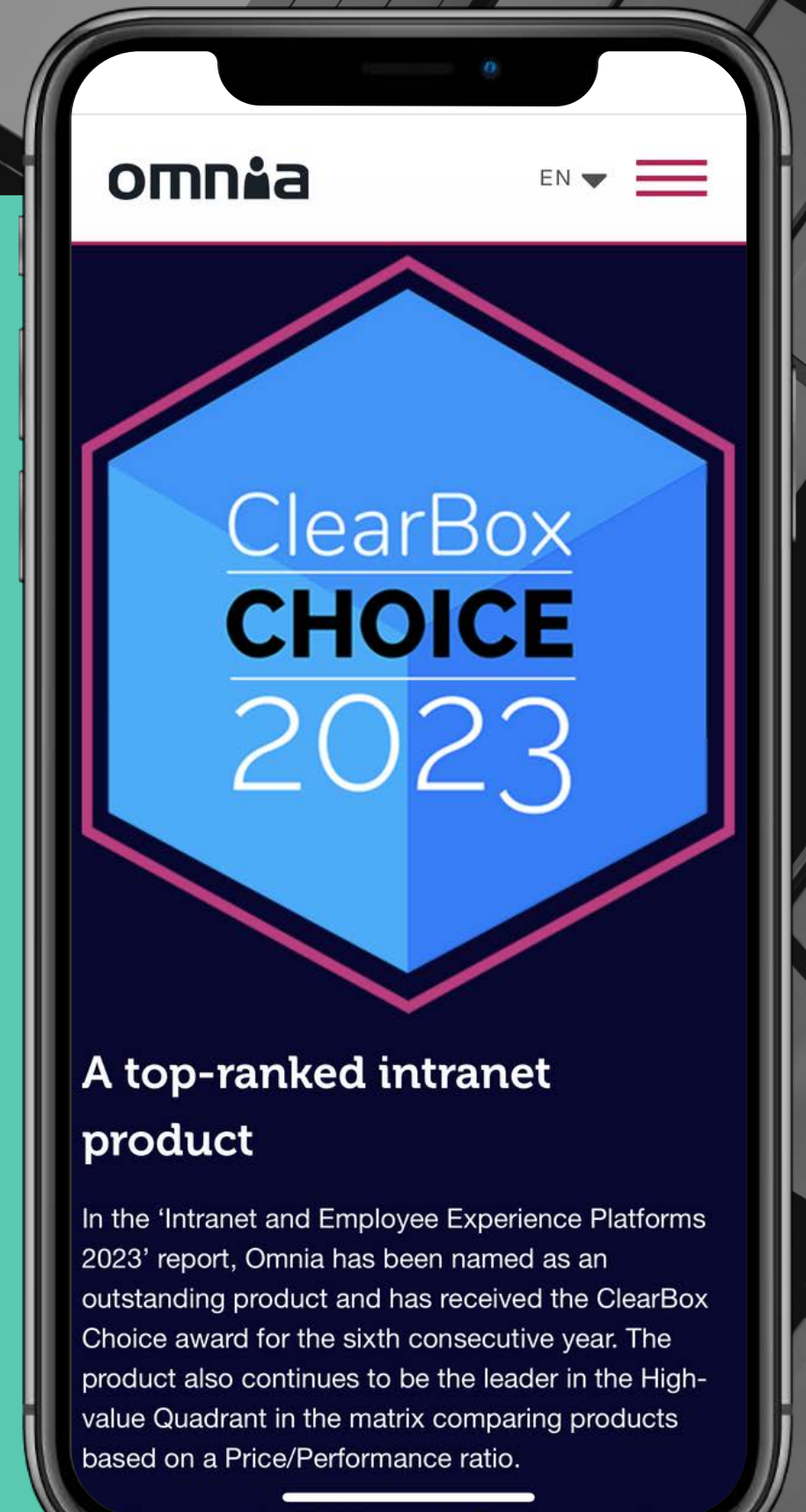
omniaintranet.com



[LinkedIn](#)



[Facebook](#)



omnia

EN



ClearBox
CHOICE
2023

A top-ranked intranet product

In the 'Intranet and Employee Experience Platforms 2023' report, Omnia has been named as an outstanding product and has received the ClearBox Choice award for the sixth consecutive year. The product also continues to be the leader in the High-value Quadrant in the matrix comparing products based on a Price/Performance ratio.