How to Update the MRP

SharePoint Site

Major Research Project – Big Data Analytics Program

Author: Brunilda Xhaferllari

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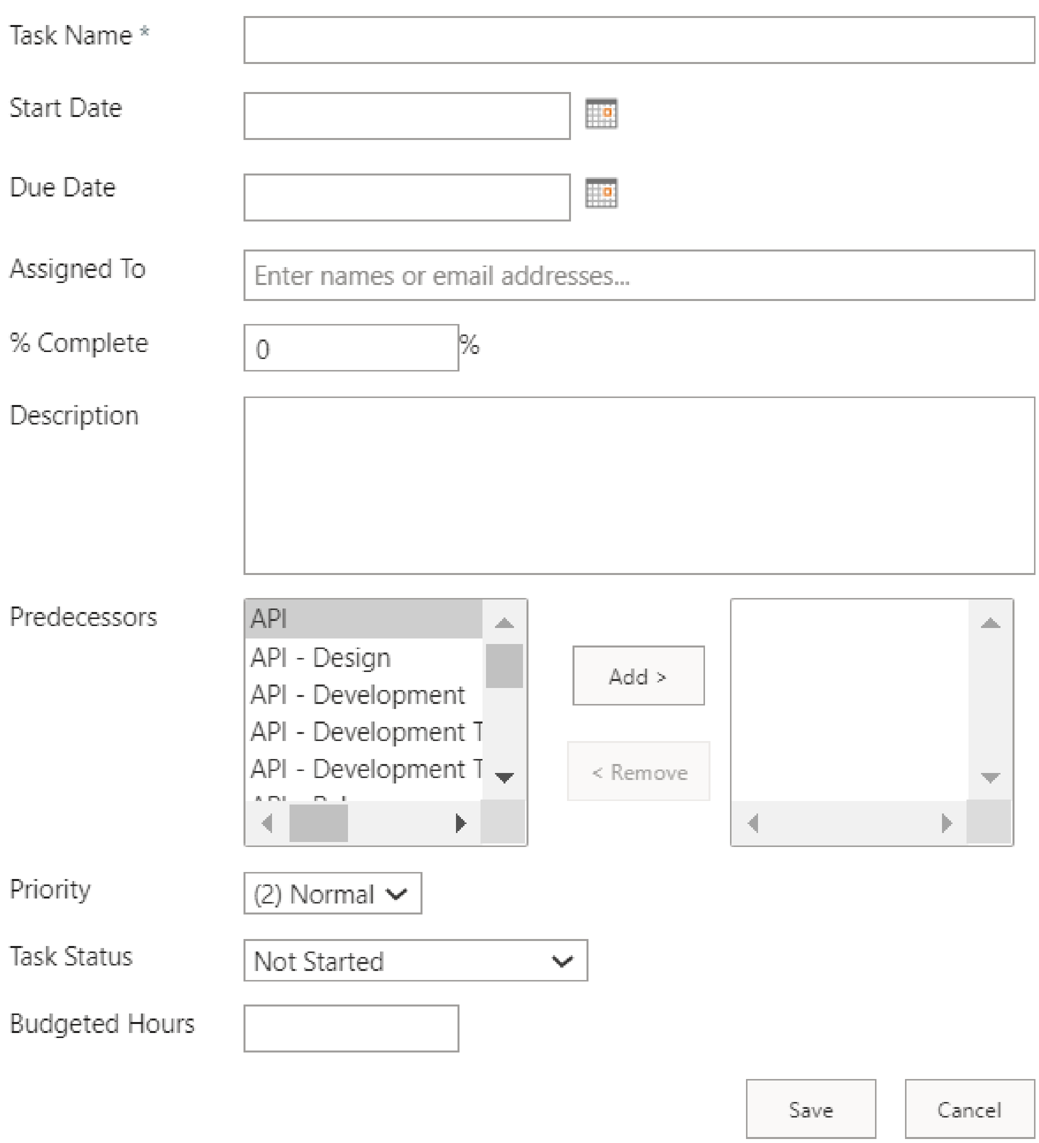
001 SharePoint High-Level Tasks

After approval of the project charter you should be able to create a list of tasks that your team has planned to follow during the entire project.

Create a new task by pressing the plus button below:

In the following screen you have all the fields needed to update for each task.



For each new task you need to create:

- The task name
- Start date of the task
- Due date of the task
- Assigned to that will identify who from your team member will complete this task
- Short description of this deliverable/task
- Assign the predecessors that will show the connection of this task with one or more previous task
- Define the priority (High, Normal, Low),
- The task status – chose one from the drop-down list
- Budgeted hours (see how to calculate it below)

You can create the tasks using Software Development Life Cycle but remember that underneath phases should have high level tasks that are the milestones of the project.

The summary tasks doesn't have a person assigned. They are tasks like proposal submission that doesn't have budgeted hours since is a milestone.

Project Initiation	March 15, 2021	April 16, 2021		0.0	4/11/2021	4/17/2021
Initiation Requirements	March 15, 2021	April 16, 2021		0.0	4/11/2021	4/17/2021
Proposal	March 15, 2021	April 2, 2021	Chris Dyck Gordon Dyck	20.0	3/28/2021	4/3/2021
Submit Proposal	April 2, 2021	April 2, 2021	Chris Dyck Gordon Dyck	0.0	3/28/2021	4/3/2021
Project Charter	April 5, 2021	April 16, 2021	Chris Dyck Gordon Dyck	20.0	4/11/2021	4/17/2021
Submit Project Charter	April 16, 2021	April 16, 2021	Chris Dyck Gordon Dyck	0.0	4/11/2021	4/17/2021
API	April 19, 2021	July 29, 2021		150.0	7/25/2021	7/31/2021
API - Requirements	April 19, 2021	April 30, 2021		18.8	4/25/2021	5/1/2021
Requirements Document	April 19, 2021	April 30, 2021	Chris Dyck Gordon Dyck	15.0	4/25/2021	5/1/2021
Environment Setup	April 19, 2021	April 21, 2021	Chris Dyck	3.0	4/18/2021	4/24/2021

Budgeted hours

When planning the hours for this project chose one of the following solutions:

1. For a team with 3 team members calculate from the kick-off meeting to project close out 15 hours per week.
2. 5 hours per team member per week for the timeline of the project
3. Your team's decision but remember that should be an amount of time that everyone will be engaged 5-8 hours per week.

The following table is an example that may help distribute wisely the project hours:

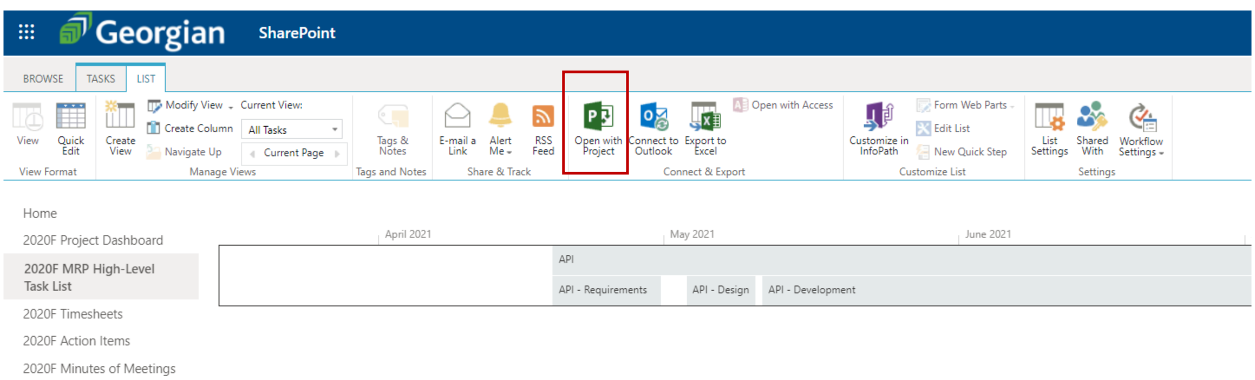
Project Phase	% of Total	Work Hours (Total Hours * %)	Weeks	Budget
Requirements	12.5%	22.5	1.5	$1125
Design	12.5%	22.5	1.5	$1125
Development	65%	117	7.8	$5850
Testing	7.5%	13.5	0.9	$675
Release	2.5%	4.5	0.3	$225
Totals	100.0%	180	12	$9000

During the weekly status update is important to show the actual work compared with the budgeted hours.

Who updates the High-level tasks: Business Analyst/Team leader and only at the beginner of the project. The team should follow the plan that is approved by the client.

002 SharePoint Microsoft Project

After setting up the SharePoint site the Microsoft Project will be automatically updated every time changes are made on High level tasks. Is accessible in High level task site content under list as shown below:

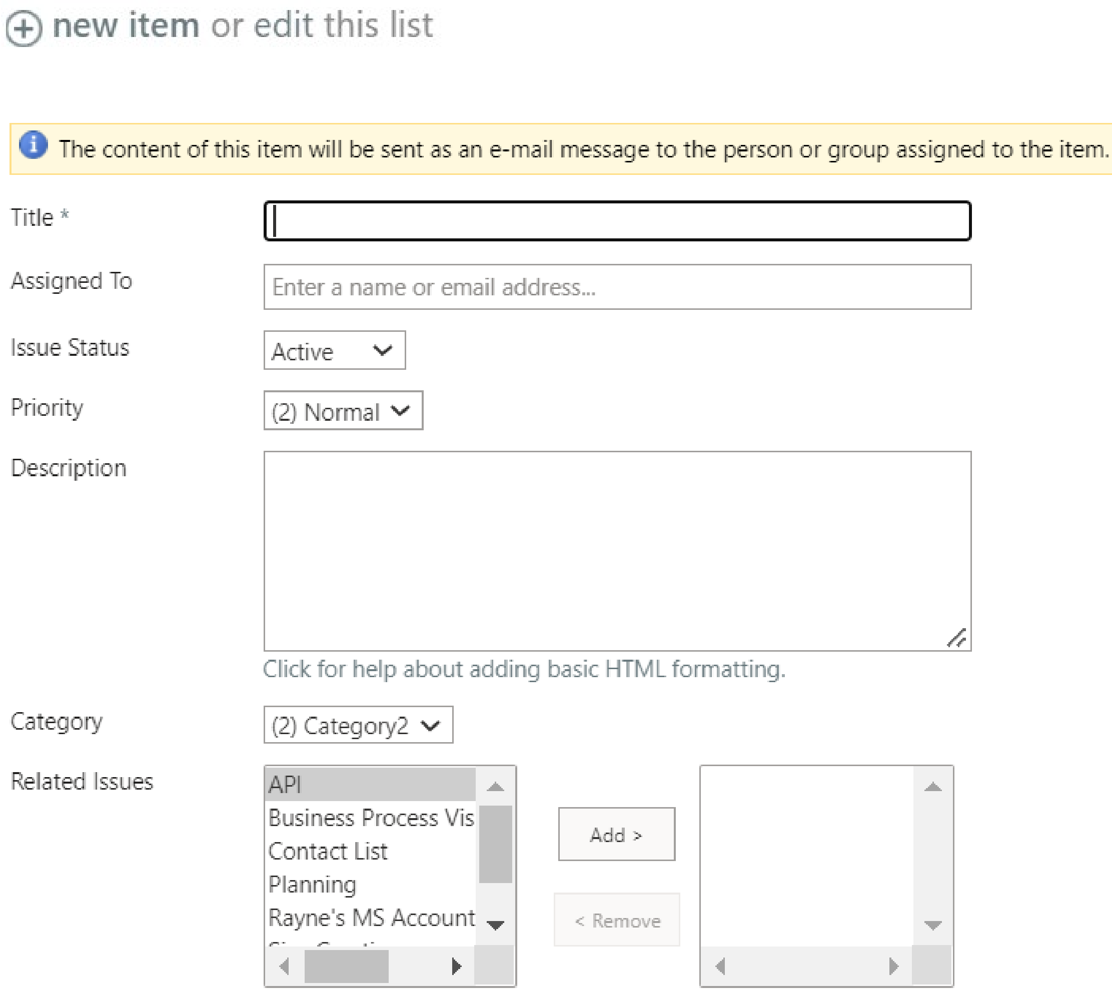


The Microsoft Project has some great reports to use for project updates that will be explored at your discretion

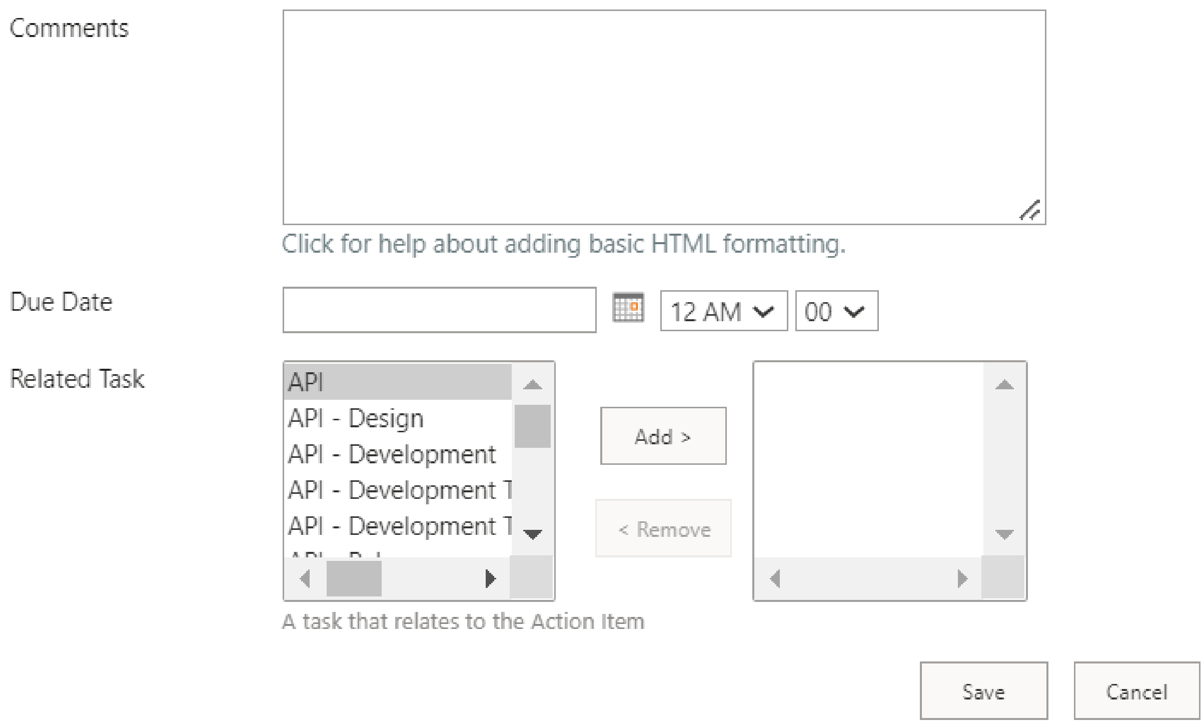
003 SharePoint Action Items

After conducting a meeting with the team or project sponsor you will have some small tasks to complete in a shorter time that may be a week or two.

Use the new item button to create the action item and fill the information as showed below:



- Title – fill with the task name
- Assign To only one person that is accountable to complete this task
- Chose the issue status if is active that means is not completed yet, resolved if completed and closed if there is not changes required anymore. After completing is the person assigned to responsibility to update it.
- Define the priority (High, Normal, Low) of this task according to your expertise
- In the description section include any important information regarding this action item
- Choose all the related issues (previous item) on the left side and press add. The item will appear on the right box.



- Add comment if you think there is relevant information regarding the item
- The due date of completing this action item
- Assign the related task/tasks related to the action item by clicking on the left box and press add button.

After saving the information the person assigned the task will receive an email regarding the task.

This is how should look like the list of action items:

2020F Action Items

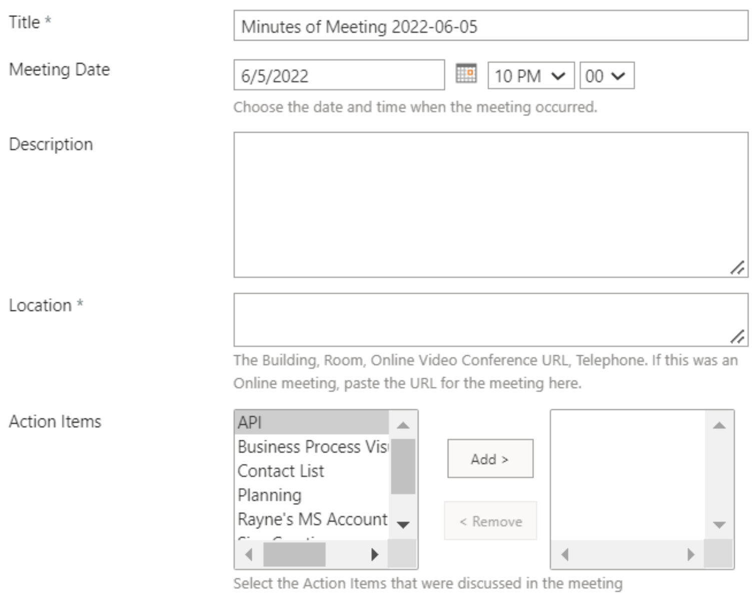
Issue ID	Title	Assigned To	Issue Status	Priority	Due Date	Related Task	+ Add column
1	API	Chris Dyck	Closed	(1) High	9/17/2020 12:00 AM	API - Development Task 2 Design Screen Mock-ups	
2	Test 2		Closed	(2) Normal			
3	Rayne's MS Account	Bruno Andrade Pinto Simc	Closed	(2) Normal	9/16/2020 12:00 AM		
4	Contact List		Active	(3) Low	10/13/2020 5:00 PM		
5	Siva Creative	Shivam Masaon	Active	(2) Normal		Requirements Document	
6	Business Process Visual for MRP	Caio Gasparine	Active	(1) High	12/23/2020 10:00 AM		
7	Planning		Closed	(2) Normal			

Who updates the Action Items: Business Analyst/Team leader

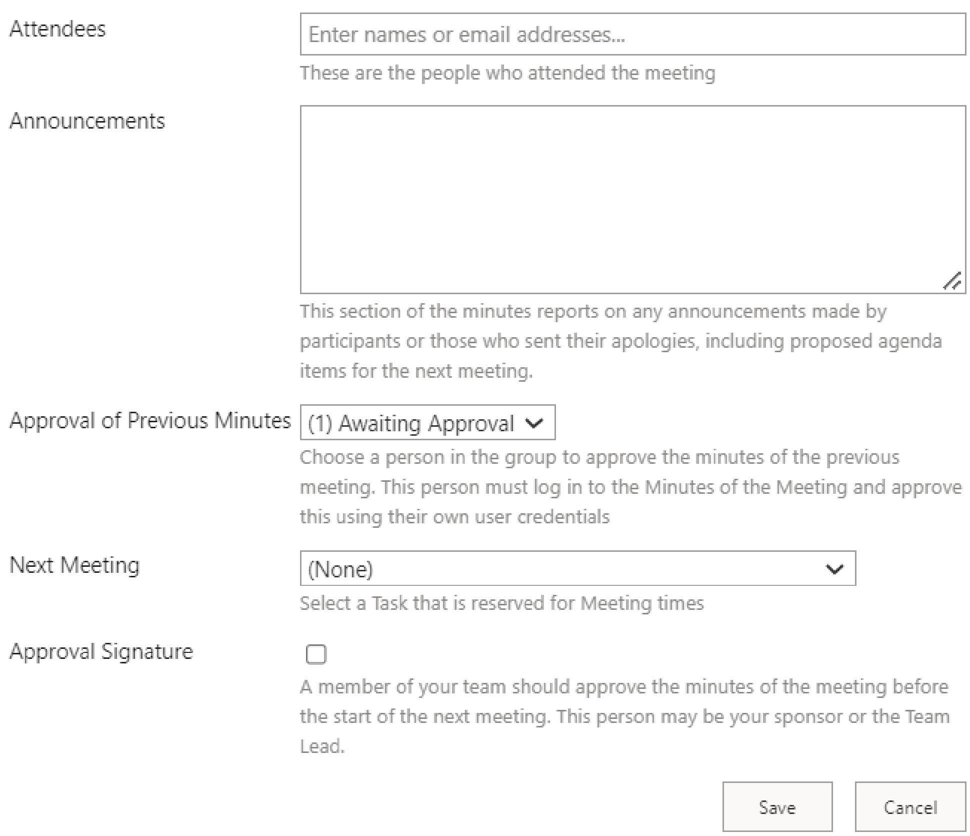
004 SharePoint Minutes of Meeting (MOM)

After each meeting conducted with the team or with the client the Business Analyst/Team need to complete the Minutes of meeting.

Create a new item on the site content:



- Title is automatically set up with the date and is important to have the meeting date.
- Meeting Date and time when the meeting occurred
- Description – details of the meeting
- Location – define the meeting channel or location details
- Action Items - after finishing the meeting and updating the Action Items you need to chose all the Action Items that are discusses/added/resolved



- Define all the attendees
- Announcements section reports any announcements made by participants or those who sent their apologies, including proposed agenda items for the next meeting
- Approval of Previous Minutes should be ‘Awaiting Approval’ and a person in the group can be accountable to approve the minutes of the previous meeting.
- In the Next meeting section select the task that is reserved for meeting times
- Approval Signature will be used from a team member that will approve the minutes of meeting before the start of next meeting. Usually this person may be your Team Lead.

Save the meeting and use the option to edit if you need to correct or update information.

Below find the view how should look like the MOM in the SharePoint site:

2020F Minutes of Meetings ☆

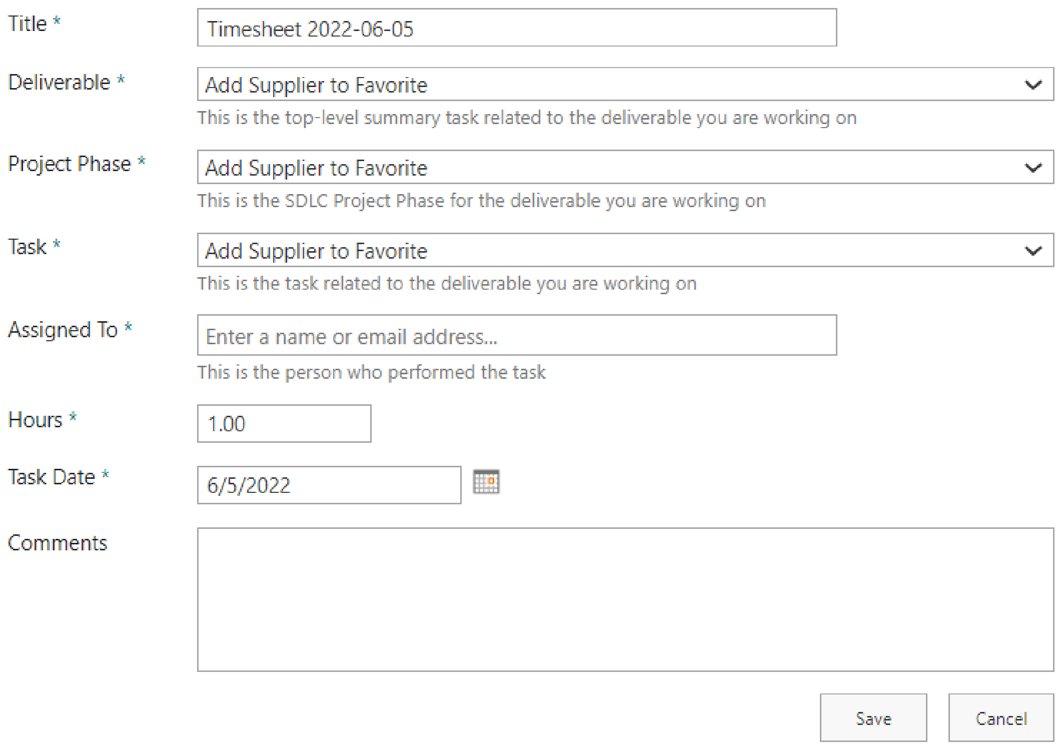
Title	Meeting Date	Action Items	Approval of Pre...	Approval Signa...	+ Add column
Minutes of Meeting 2020-09-15	9/15/2020 4:00 PM	API Test 2	(3) Approved	✓	
Minutes of Meeting 2020-09-22	9/22/2020 4:00 PM	Test 2	(3) Approved	✓	
Minutes of Meeting 2020-09-14	9/14/2020 12:30 PM	Rayne's MS Account	(1) Awaiting Approval	✓	
Minutes of Meeting 2020-09-24	9/24/2020 9:30 AM	API Test 2	(3) Approved		
Minutes of Meeting 2020-10-06	10/6/2020 5:00 PM	Contact List API	(1) Awaiting Approval	✓	
Minutes of Meeting 2020-10-13	10/13/2020 10:00 AM	API Rayne's MS Account Siva Creative	(1) Awaiting Approval	✓	
Minutes of Meeting 2020-12-16	12/16/2020 11:00 AM	Business Process Visual fo API Contact List Siva Creative	(1) Awaiting Approval		

Who updates the Minutes of Meeting: Business Analyst/Team leader after each meeting (internal & client)

005 SharePoint Timesheets

Timesheets are the work done in the project. After an internal/client meeting, completing a action item is each team member responsibility to update the Timesheets.

⊕ new item or edit this list



- You can use the conventional name for the timesheets title or change it as needed.
- Chose as deliverable the high level task related to your work.
- Project Phase – the Software Development life cycle phase for the deliverable you are working
- Task - the task related to the deliverable you are working
- The person who performed the task
- The about of hours spent on this task
- The date when worked on the task
- Any relevant comment regarding the timesheet

For the same task, they can be multiple timesheets with the same or different dates and times.

Below is shown how should look like the timesheets:

new item or edit this list

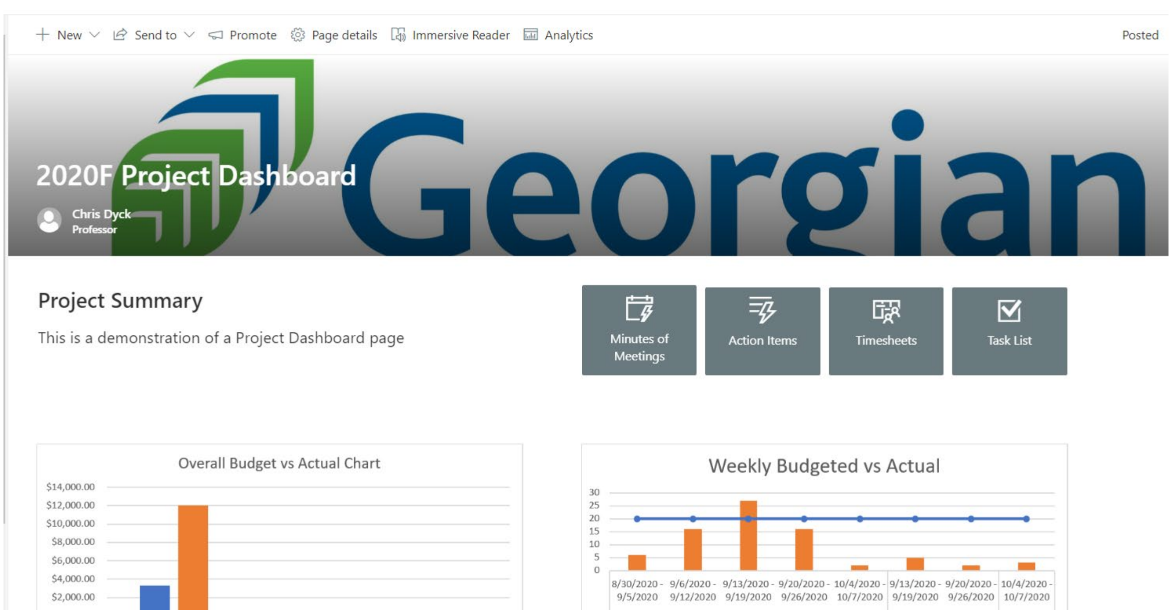
All Items   GANTT   Grouped By Assigned To   ...   Find an item

Title	Deliverable	Project Phase	Task	Task:Budgeted Hours	Assigned To	Hours	Task Date	Comments
Timesheet 2020-09-09	API	API - Requirements	Requirements Document	15.0	Chris Dyck	5.00	9/8/2020	View Entries
Timesheet 2020-09-09	API	API - Design	Design Screen Mock-ups	8.0	Chris Dyck	10.00	9/9/2020	View Entries
Timesheet 2020-09-09	API	API - Requirements	Requirements Document	15.0	Chris Dyck	5.00	8/31/2020	View Entries
Timesheet 2020-09-12	API	API - Design	Design Screen Mock-ups	8.0	Chris Dyck	1.00	9/3/2020	View Entries
Timesheet 2020-09-13	API	API - Requirements	Requirements Document	15.0	Chris Dyck	1.00	9/11/2020	View Entries
Timesheet 2020-09-14	Database	Database - Design	Design Screen Mock-ups	8.0	Gordon Dyck	5.00	9/14/2020	View Entries
Timesheet 2020-09-20	API	API - Development	API - Development Task 1	65.0	Chris Dyck	10.00	9/15/2020	View Entries
Timesheet 2020-09-20	API	API - Development	API - Development Task 2	15.0	Chris Dyck	5.00	9/16/2020	View Entries
Timesheet 2020-09-20	API	API - Development	API - Development Task 2	15.0	Chris Dyck	12.00	9/16/2020	View Entries
Timesheet 2020-09-20	API	API - Requirements	Requirements Document	15.0	Chris Dyck	10.00	9/20/2020	View Entries
Timesheet 2020-09-20	API	API - Development	API - Development Task 2	15.0	Chris Dyck	6.00	9/20/2020	View Entries
Timesheet 2020-09-24	Database	Database - Requirements	Requirements Documents	11.0	Chris Dyck	2.00	9/24/2020	View Entries
Timesheet 2020-10-06	API	API - Design	Design thing 2	7.0	Chris Dyck	2.00	10/5/2020	View Entries
Timesheet 2020-10-06		Requirements	Class Meeting 1	3.0	Chris Dyck	3.00	10/6/2020	View Entries

Who updates the Timesheets: Each team member is responsible to complete the timesheets and the Business analyst/Team leader can reach them to make sure that everyone updates the timesheets.

006 SharePoint Project Dashboard

In order to have the graphs updated is important to remind to open the file excel, update the connection with the SharePoint site and then save it. The team can add more graphs or visualization that will show the project’s progress and will facilitate the work for the weekly status update.



Who updates the Dashboard: Business Analyst/Team Leader.

007 SharePoint Documents

Under documents, they are folders that need to be updated with materials for each phase of the project. For example, once completed the Design Phase the team should save all the wireframes, entity relationship diagram, draws, etc.