

## SharePoint® for Project Management - 3 Days

### Course 919 Overview

#### You Will Learn How To

- Exploit SharePoint Technologies to manage successful projects
- Build a SharePoint Project Management Information System (PMIS)
- Create and customize a SharePoint site for effective project collaboration
- Monitor and analyze the project schedule and milestones in a SharePoint site
- Generate on-demand project status reports
- Synchronize common project management tools with SharePoint

#### Course Benefits

Inefficient communication among stakeholders, poor document management practices and undefined project collaboration standards can compromise project success. SharePoint provides a web-based framework that can empower organizations to create a standards-based PMIS with formal project management methodology. In this course, you acquire the knowledge and skills to more effectively manage projects using SharePoint.

#### Who Should Attend

Project managers and project teams who want to leverage SharePoint to manage projects more effectively. Course 296, "Project Management: Skills for Success," or equivalent knowledge is assumed. Prior experience with SharePoint is helpful but not required.

#### RealityPlus™

Through a multimedia-enhanced three-day simulation, you manage a comprehensive project with SharePoint 2010. You use project management best practices to create and utilize a SharePoint PMIS that allows you to actively plan, control and close the project. Experiential activities include:

- Taking advantage of relevant project management standards and processes
- Building and customizing a SharePoint PMIS
- Creating a SharePoint communication plan
- Generating lists and document libraries
- Utilizing SharePoint collaboration tools
- Monitoring and updating project tasks
- Enabling change control with the SharePoint workflow
- Customizing management dashboards with Web Parts
- Updating a lessons learned wiki

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### Course 919 Outline

#### Overview of a SharePoint PMIS

- What is a Project Management Information System (PMIS)?
- Leveraging industry best practices, tools and techniques to achieve project success
- Benefiting from SharePoint collaboration features
- Tailoring SharePoint as a standards-based PMIS

#### Establishing the PMIS Platform

##### Creating the SharePoint PMIS

- Presenting a project management methodology
- Identifying relevant organizational processes
- Setting up sites with new and existing templates
- Configuring basic PMIS features
- Performing initial site administrative tasks

#### Adding users and setting permissions

- Defining organizational structure
- Determining stakeholders and communication requirements
- Building a SharePoint communication plan
- Assigning site memberships
- Customizing permissions for specific site components

#### Customizing the PMIS structure and standards

- Planning the information architecture
- Generating issue, contact, calendar, project tracking and custom lists
- Centralizing documents in libraries
- Supporting various document types: PDF, Word documents and Excel spreadsheets

#### Fostering Team Collaboration

##### Identifying project coordination challenges

- Real time
- Remote
- Offline
- Performing a needs assessment
- Selecting the appropriate SharePoint solution

##### Employing SharePoint collaboration features

- Enabling version control, check-in/check-out and content approval for document management

- Allowing for offline communication with discussion boards
- Utilizing wikis for efficient content management
- Linking Microsoft Office to SharePoint through a document workspace

#### Tracking Projects with SharePoint

##### Monitoring the project schedule

- Establishing project tracking guidelines
- Documenting a risk management process
- Subscribing to automated alerts

##### Analyzing project progress

- Comparing planned vs. actual task performance
- Assigning tasks to team members with the Project Task List
- Updating the Issues List

##### Correcting project deviation

- Determining change control procedures
- Approving changes with the SharePoint workflow
- Reevaluating the project schedule

#### Disseminating Project Reports

##### Informing project status to stakeholders

- Filtering project information with custom views
- Creating management dashboards with Web Parts

##### Establishing a Meeting Workspace

- Centralizing meeting agendas, documents, action items, schedules and contacts
- Linking Microsoft Outlook with SharePoint
- Locating project information with the built-in search tool

#### Integrating Project Management Tools

##### Leveraging existing project tracking documents

- Employing Microsoft Office 2010 integration with SharePoint Server
- Exporting Microsoft Excel spreadsheet data to SharePoint lists
- Synchronizing a Microsoft Project plan with a project task list

##### Presenting project status data

- Editing a Microsoft PowerPoint presentation from a SharePoint PMIS

- Considering third-party products and application compatibility with SharePoint

#### Successfully Closing the Project

- Transferring project and personal lessons learned
- Archiving the SharePoint PMIS