

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 customise a SharePoint site for effective project collaboration
- Monitor and analyse the project schedule and milestones in a SharePoint site
- Generate on-demand project status reports
- Synchronise 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 organisations 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. You use project management best practices to create and utilise 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 customising a SharePoint PMIS
- Creating a SharePoint communication plan
- Generating lists and document libraries
- Utilising SharePoint collaboration tools
- Monitoring and updating project tasks
- Enabling change control with the three-state workflow
- Customising 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 organisational processes
- Setting up sites with new and existing templates
- Configuring basic PMIS features
- Performing initial site administrative tasks

Adding users and setting permissions

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

Customising the PMIS structure and standards

- Planning the information architecture
- Generating issue, contact, calendar, project tracking and custom lists
- Centralising 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
- Utilising 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

Analysing 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 three-state workflow
- Re-evaluating 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

- Centralising 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

- Exporting Microsoft Excel spreadsheet data to SharePoint lists
- Importing a SharePoint Task List into Microsoft Project

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