SharePoint 2010 for Project Management
Course SP03; 3 Days, Instructor-led

Course Description
Leverage Microsoft SharePoint to increase the success rate of your projects and meetings in this SharePoint Project Management training course.

Course Objectives
- Enterprise-class project management with SharePoint
- Real-world configurations & customized project sites
- How to make SharePoint your ultimate PMIS
- Running tight version control using SharePoint tools
- Workflow & process automation, calendars, Gantt charts, & more
- Integrate project work & Microsoft Office & Project 2010
- Reporting with SharePoint's Excel Services
- Forecasts, KPIs, Business Intelligence, & more
- New business intelligence features for informative reporting & digital dashboards
- Content management for easy web site creation
- Use new real-time collaborative technologies in SharePoint and Office 2010
- Design "tell-all" dashboards for complete view of projects
- Use SharePoint BI features to graphically display project data

Audience
- Project Managers
- Business Analysts
- Operation Managers
- Team Leads
- Product Managers
- SharePoint Power Users
- Marketing Managers
- IT Managers
- Data Analysts
- PMO Managers/Directors

Course Outline
SharePoint as a Project Management Information System
A. What is a PMIS?
B. Why SharePoint?
C. SharePoint’s Collaboration Features
**Hands-On Lab:**
- Prepare the proper configurations for using SharePoint in your organization

**Creating a PMIS System**
A. Creating the SharePoint PMIS
   1. Presenting a project management methodology
   2. Identifying relevant organizational processes
   3. Setting up sites with new and existing templates
   4. Configuring basic PMIS features
   5. Performing initial site administrative tasks
B. Managing Users and Permissions
   1. Defining an organizational structure
   2. Determining project stakeholders and communications requirements
   3. Building a communication plan
   4. Assigning site memberships
C. Customizing the PMIS Structure
   1. Planning the information architecture
   2. Classifying content
   3. Generating custom lists for the PMIS
      a. Issue Lists
      b. Contacts
      c. Calendars
      d. Project Tracking
      e. Custom Lists
   4. Supporting multiple document types
D. Publishing a Microsoft Project Schedule to SharePoint

**Hands-On Labs:**
- Create a SharePoint project site
- Configure site options
- Configure permissions, assign team members to the site
- Customize the PMIS structure
- Integrate Microsoft Project with SharePoint
- Contacts
  — Generating custom lists for the PMIS
  — Calendars
  — To Do Lists
  — Issues Lists
  — Configuring Document Libraries

**Enabling Team Collaboration with SharePoint**
A. The challenges facing collaborative efforts
   1. Real-Time Collaboration
   2. Collaboration with remote users
   3. Support for offline collaboration
   4. Performing a needs assessment
   5. Selecting and designing the appropriate solution
B. Implementing SharePoint’s Collaboration Features
1. Content Management Features
   a. Enabling version control
   b. Document check-in/check-out
   c. Content Approval
2. Polling the team with surveys
3. Discussion Forums
4. Utilizing Wikis
5. Document Workspaces

**Hands-On Labs:**
- Enabling and configuring content mgmt features
- Create discussion forums, surveys, and wikis
- Create document workspaces

**Tracking Projects with SharePoint**
A. Monitoring the Project
   1. Establishing Project Tracking Guidelines
   2. Documenting a Risk Management Process
   3. Keeping up-to-date with Automated Alerts and RSS
B. Tracking Project Progress
   1. Assigning project tasks with the Project Task List
   2. Updating the Issues List
   3. Locating Specific Project Information with Search
C. Dealing with Deviations
   1. Determining Change Control procedures
   2. Understanding the three-state workflow
   3. Re-evaluating the Project Schedule

**Hands-On Labs:**
- Set up automated alerts for project status
- Subscribing to RSS updates
- Working with project task lists
- Updating the issues list
- Searching your project for vital information

**Working with Business Intelligence**
A. Distributing Project Status to Stakeholders
   1. Forecasting with KPIs (Key Performance Indicators)
   2. Filtering Project information with Custom Views
B. Creating Management Dashboards with SharePoint WebParts
C. Working with Microsoft Excel Spreadsheets
   1. Importing data from Excel Spreadsheets
   2. Exporting data to an Excel Spreadsheet

**Hands-On Labs:**
- Distributing project status to stakeholders
- Lab forecasting with KPIs
- Create custom views for information
Creating a Mgmt Dashboard with SharePoint WebParts
Import and Export data using Microsoft Excel

Establishing Processes and Standards with SharePoint
A. Business Process Management
   1. Optimize processes and services with SharePoint
   2. Automate processes and services with SharePoint

Hands-On Lab:
   • Build business process automation using a three state workflow

Managing Meetings with Meeting Workspaces
A. Understanding Meeting Workspaces and their Components
   1. Meeting Agendas
   2. Documents
   3. Action Items
   4. Schedules
   5. Contacts and Stakeholders
B. Integrating Microsoft Outlook with SharePoint

Hands-On Labs:
   • Develop meeting workspaces
   • Utilize a meeting workspace with Outlook

Working with Microsoft Access
A. Why Microsoft Access?
B. Converting and publishing existing Access databases
C. Creating new Access databases

Hands-On Labs:
   • Migrate existing Microsoft Access projects and expose them through SharePoint's web-based user interface.

Creating a PMO View
A. Rolling-Up Project Information
B. Customizing Information and Views
C. Creating a master project calendar
D. Designing a Project Manager dashboard

Hands-On Labs:
   • Use existing capabilities to "roll-up" data form your projects and create a dashboard for project managers, sponsors and stakeholders.
   • Create a dashboard that allows users to follow and manage their project tasks from a single page, without having to jump from project to project.
**Concluding a Project**
A. Transferring Lessons Learned
B. Archiving the SharePoint PMIS
C. Creating Templates for Future Projects