Essential SharePoint for Project Managers

Audience

Project Managers, Program Managers, SharePoint Admins, PMO Staff

Features

- Hands on learning
- PMP® certified instructors
- A Complete system for using SharePoint on your Projects
- Flash drive with templates, checklists, and other resources
- One on one coaching

Overview

This hands-on workshop focuses on using Microsoft® SharePoint to increase team efficiency and success rates with your projects, programs, and portfolios.

Participants will learn and apply best practices using SharePoint for project collaboration, tracking, process automation, KPI dashboards, document management, and reporting.

Participants will utilize their own full SharePoint environment (MOSS 2007) working through labs that include:

- Defining Governance for your SharePoint environment
- Configuring your PMO and project SharePoint sites, adding site members,
- Setting permissions
- Integrating SharePoint with Microsoft® Project and Excel
- Publishing reports to SharePoint using Excel Services
- Creating custom lists for risk management, issue tracking, team information, tasks, and milestones
- Synchronizing shared calendars, tasks lists, and discussions with Outlook
- Using KPIs to track project health, and creating dashboards
- Creating online forms for issue management, project change requests, and other templates
- Automating project processes with SharePoint Workflows
- Having resources enter updates online and synchronizing with MS Project
- Using meeting and document workspaces
- Archiving your project data and using SharePoint Surveys for capturing lessons learned

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Day 1	Day 2

❖ **Overview of SharePoint Governance**
  ➢ What is Governance?
  ➢ Defining the SharePoint Taxonomy
  ➢ Communication and documenting requirements
  ➢ Roles and responsibilities
❖ Overview of Collaborative PM using SharePoint
  ➢ Collaborative Project Management
  ➢ How SharePoint can help
❖ Microsoft SharePoint Environment
  ➢ SharePoint Site Collections
  ➢ SharePoint Primary Capabilities
  ➢ WSS 3.0 vs MOSS Standard vs. MOSS Enterprise
❖ SharePoint as a Project Management Tool
  ➢ Planning your SharePoint implementation
  ➢ Creating your SharePoint sites
  ➢ Working with templates
  ➢ Importing a task list from MS Project
❖ Adding Site Members
  ➢ Working with stakeholders and their requirements
  ➢ Granting access to site members / permissions
  ➢ Site personalization
  ➢ Creating SharePoint Groups
  ➢ Managing permissions for a list or document library
❖ Adding site members / external stakeholders
  ➢ Working with Documents
  ➢ Document Libraries
  ➢ Document protection - permissions & security
  ➢ Version control / document histories
  ➢ Creating a content management system
  ➢ Customizing Columns
❖ Bringing it all Together
  ➢ Three key functions of your PMIS
  ➢ SharePoint Lists
  ➢ Risk Management best practices with SharePoint
  ➢ Creating a custom list
  ➢ Using email alerts and RSS features
❖ Collaborating with SharePoint
  ➢ Creating Meeting Workspaces
  ➢ Using Meeting Workspaces effectively for meetings
  ➢ Working with Document Workspaces
	❖ Tracking Project Progress
	  ➢ Updating progress / Requesting updates
	  ➢ Creating and automating project change requests
	  ➢ Tracking milestones and project health
	  ➢ Customizing status reports
	❖ Using Microsoft Project with SharePoint
	  ➢ Creating WBS in MS Project - sending to SharePoint
	  ➢ Synchronizing to SharePoint without Project Server
	  ➢ Putting MS Project reports online with SharePoint
	  ➢ Resourcing MS Project plans with SharePoint users
	❖ Using Excel with SharePoint
	  ➢ Excel Services
	  ➢ Publishing reports to SharePoint using Excel
	  ➢ Synchronizing Excel spreadsheets with SharePoint
	❖ Using Outlook with SharePoint
	  ➢ Using Shared Calendars
	  ➢ Synchronizing Task lists with Outlook
	  ➢ Using RSS and Alert Me features
	❖ Automating Processes with Workflows
	  ➢ Workflow templates
	  ➢ Using Workflows for change requests, issues, project notifications and processes
	  ➢ Creating custom workflows with SharePoint Designer
	❖ Creating Online Forms
	  ➢ Using InfoPath to create forms
	  ➢ Customizing forms and publishing with SharePoint
	  ➢ Assigning a Workflow to a finished form
	❖ Project Reporting with SharePoint
	  ➢ Status Reports
	  ➢ Using the Report Center
	  ➢ Publishing reports with Excel Services
	  ➢ Building a portfolio management dashboard
	  ➢ Using KPIs
	❖ Closing out your project
	  ➢ Capturing lessons learned
	  ➢ Conducting surveys with SharePoint
	  ➢ Archiving your project site and data
	  ➢ Saving your site as a template

Course Schedule and Information
Registration: Please contact Tom Mattus at 877-390-3057, **all major credit cards accepted**.

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