


7 Ways to Leverage SharePoint for Project Management Success

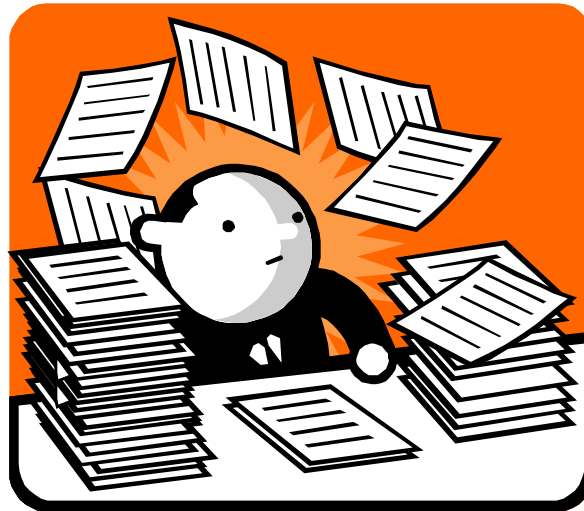
Dux Raymond Sy, PMP
Presenter

Activity: The Reality of Managing Project Information

- **On a sheet of paper, identify three challenges in managing project information**
- **For example:**
 - Multiple tools used
 - Cannot keep track of document versions
 - Cannot define access control

Debrief: The Reality of Managing Project Information

 If you were told to summarize the feedback of the entire group and present it in a chart, how easy would it be? How long would it take you to do?



Presentation Objectives

- **After completing this presentation, you will be able to describe the benefits of utilizing SharePoint as a Project Management Information System (PMIS)**
- **In addition, you will be able to comprehend SharePoint's capabilities to**
 - Easily create a Project Management Information System (PMIS)
 - Enable efficient document management
 - Integrate common project management tools
 - Facilitate team collaboration
 - Automate project processes
 - Generate relevant project reports
 - Allow mobile PMIS access

Featured Speaker: Dux Raymond Sy, PMP

- **Managing Partner, Innovative-E, Inc.**
 - Provides IT and project management consulting services to diverse global clients: Fortune 500, government agencies, non-profit institutions
 - Among the leading experts in leveraging technology to enhance project management
- **Contract Author and Instructor for Learning Tree International**
 - Course 538: Comprehensive Introduction to SharePoint, Author
 - Course 919: SharePoint for Project Management, Author
 - Teaches various training courses worldwide
- **Author of “SharePoint for Project Management”, by O’Reilly Media**
- **For more information, visit Dux’s blog <http://www.meetdux.com>**
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7 Ways to Leverage SharePoint for Project Management Success

► Why SharePoint?

7 Ways to Utilize SharePoint

Questions and Answers

Introduction to Microsoft SharePoint

- **Allows *individuals in an organization to easily create and manage their own collaborative Web sites***
 - Simplifies how people find and share information across boundaries, and enabling better informed decisions
 - Seamlessly integrates with Windows and Microsoft Office
- **Does not refer to a specific product or technology**
 - Using the word “Microsoft SharePoint” is like using the word “Microsoft Office”
 - Refers to several aspects of Web-based collaborative solutions
- **Major components**
 - Windows SharePoint Services 3.0
 - Microsoft Office SharePoint Server 2007

What is a Project Management Information System (PMIS)?

- **A standardized set of automated project management tools available within the organization and integrated into a system**
- **Used by the project management team to**
 - Support the generation of project charter, schedule, and budget
 - Facilitate communication and feedback
 - Monitor project activities
 - Control project changes
 - Analyze and forecast project performance
 - Disseminate project status to relevant stakeholders
- **Contains real-time information essential for initiating, planning, executing, controlling, and closing a project**

 **In a project life cycle, when is a PMIS used?**

Available PMIS Solutions

- **Microsoft SharePoint**
- **Microsoft Project Server**
- **Clarity**
- **Primavera**
- **Web-based**
 - Google Team Site
 - Basecamp
 - Zoho

SharePoint as a PMIS

- **Individual projects can have a collaborative web site**
- **Access can be limited to the project team and appropriate stakeholders**
- **Project artifacts can be centrally stored and maintained**
- **Project communications can be streamlined**
- **Relatively easy to use**
 - IT intervention is minimal
 - Based on familiar tools and technologies: Web, Windows, Microsoft Office



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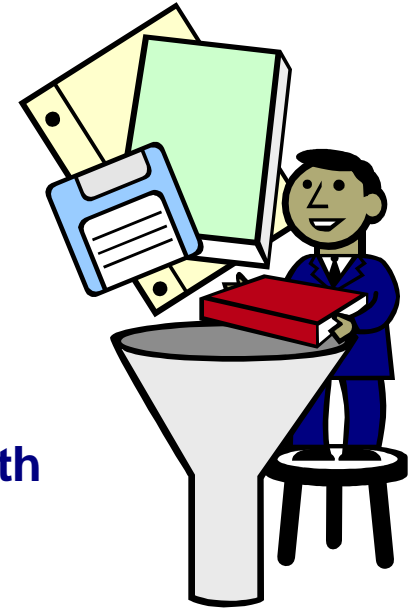
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Questions and Answers

#1 Easily Create a PMIS

- **Technical skill requirement is minimal**
 - Microsoft Windows
 - Microsoft Office
 - Familiar with web browsing
- **Easily define stakeholder access**
 - Based on project communication needs
- **If deployed appropriately, IT does not have to deal with**
 - Updating content
 - Defining account privileges
 - Maintaining a document repository



#2 Efficiently Manage Project Information

- **SharePoint provides various tools to effectively centralize and manage project information**
 - Project Schedule
 - Project Documents
 - Change Request
 - Risk/Issue Log
 - Resource Pool
 - Calendars
 - Contacts
 - Forms, Templates, Checklists
- **Document management features**
 - Information storage
 - Check-in/check-out
 - Version control
 - Content approval





Project Manager Creates a SharePoint PMIS

#3 Facilitate Project Collaboration

- **Document Collaboration**

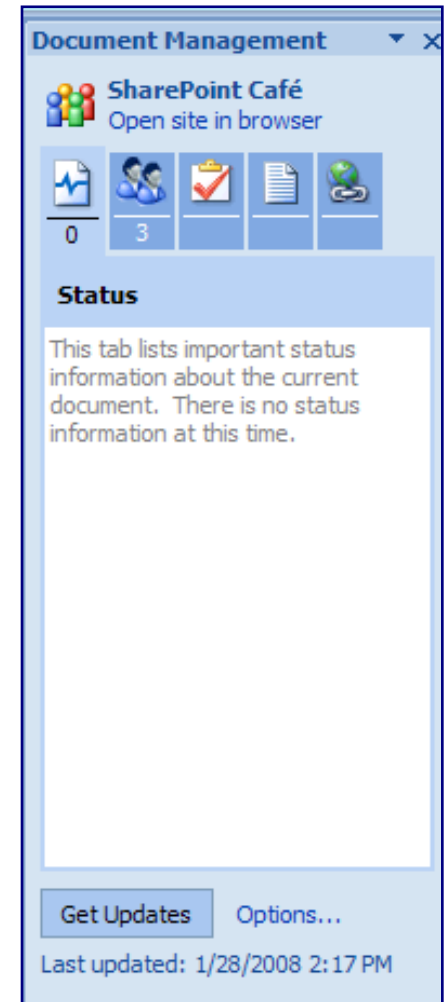
- Document Workspaces can be used to jointly develop requirements document, reports, templates, etc.

- **Team Collaboration**

- Wikis to document lessons learned
- Discussion boards for offline communication
- Meeting Workspaces to support project meetings

#4 Seamlessly Integrate Existing PM Tools

- **Traditionally, Microsoft focused on improving the feature set of Office**
 - With Office 2003/2007, Microsoft has changed its focus from features to collaboration
- **Allows teams to work together more effectively**
 - Fully integrated in all Office 2003/2007 products
- **Fundamental features: check-out/check-in and version control available directly from the File menu**
- **Document management pane allows direct interaction with SharePoint**
- **Integration with Microsoft Project possible**
 - Microsoft Project Server
 - Third Party tools: Project Publisher from EPM Live

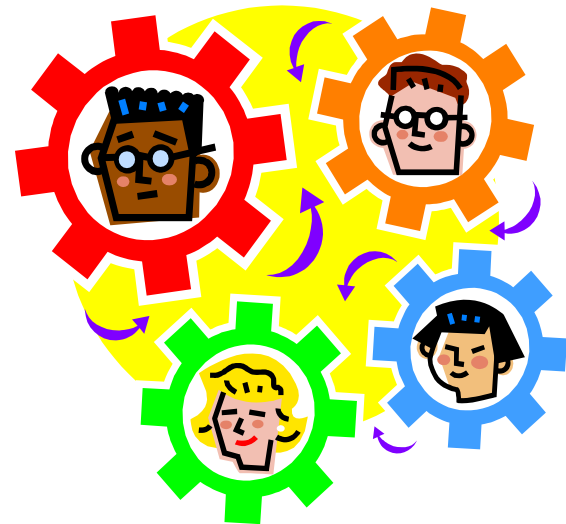




Synchronizing Excel and SharePoint

#5 Automate Project Processes

- **Effective project management depend on processes or human workflows**
 - The most important processes in many organizations depend on people
 - Automating interactions among the people who participate in a process can improve how that process functions, increasing its efficiency and lowering its error rate
- **SharePoint supports the automation of workflows, for example:**
 - Expense Reimbursement
 - Vacation Request
 - Purchase Order
 - Change Control
 - _____
 - _____

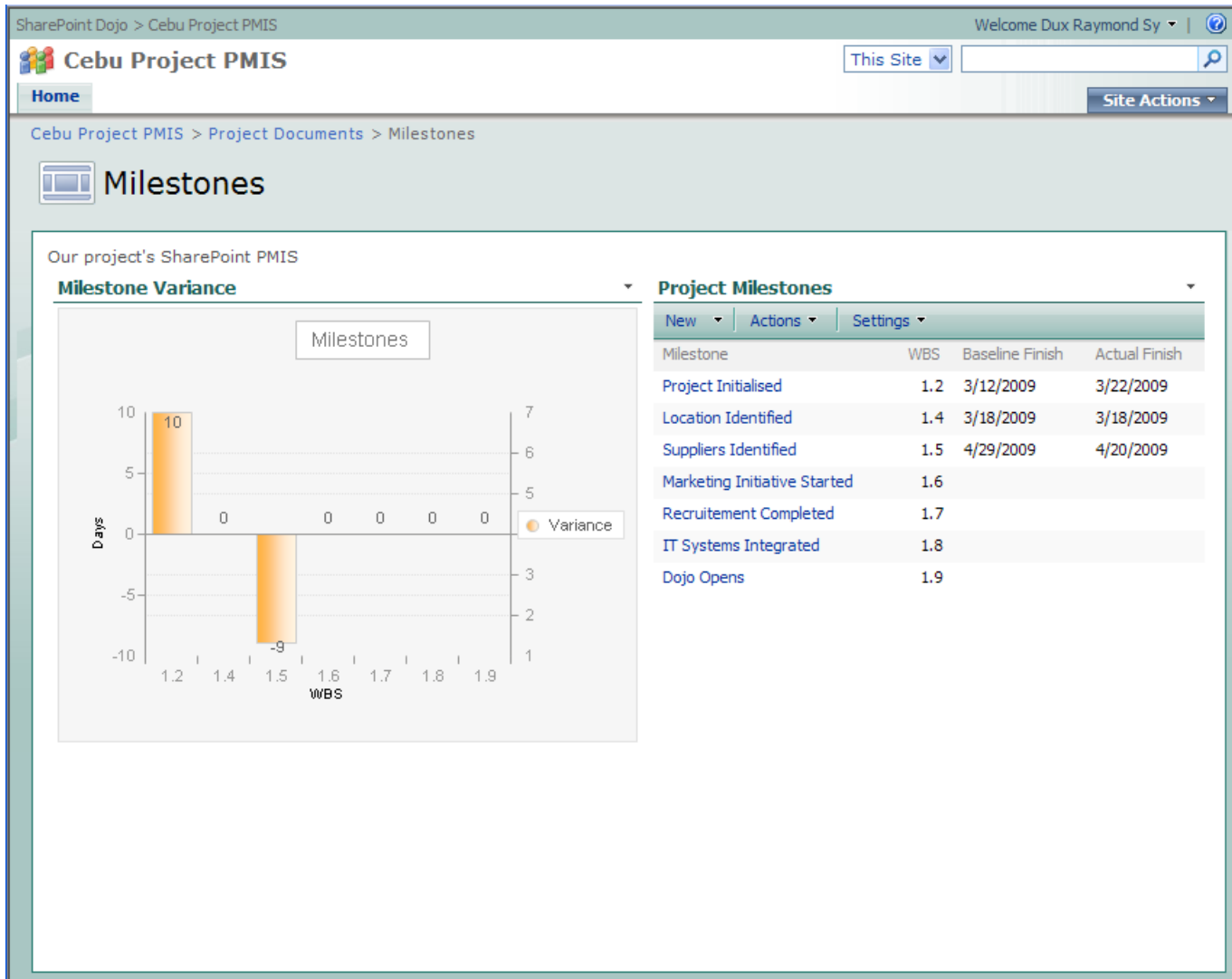


#6 Generate Relevant Project Reports

- **SharePoint can be used to generate relevant**
 - Interactive summary of a project
 - Project tasks information
 - Automated alerts
- **In SharePoint, dashboards can be created and displayed using Web Parts**
 - Red, Amber, Green (RAG) Status
 - Key Performance Indicators (KPI)
 - Charts
- **Various Web Parts available**
 - Out of the Box
 - Third Party Tools: PM Web Parts from Bamboo Solutions

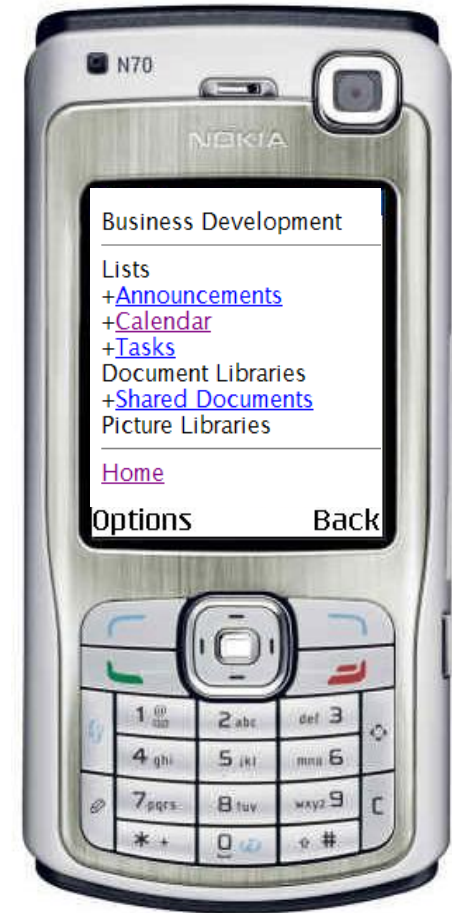


Milestones Dashboard



#7 Enable Mobile Access

- **If enabled, it is accessible via the Web**
 - Industry standard web browser
 - No special software needed
- **A mobile version of a SharePoint site is created automatically upon creation of a site**
 - Accessed via the subdirectory /m/
 - <http://sharepointcafe/m/>
 - Web pages are optimized and formatted for a mobile browser
- **In addition, e-mail can be used to interact with a SharePoint PMIS**



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Any Questions?



Where Do I Go From Here?

- **SharePoint for Project Management published by O'Reilly Media**
- **Course 919: Leveraging SharePoint for Project Management**
 - **Duration:** 3 Days
 - **Who Should Attend:** Project managers and project teams who want to leverage SharePoint to manage projects more effectively. Prior experience with SharePoint is not required
 - <http://www.learningtree.com/919>
- **Course 538: SharePoint Technologies: A Comprehensive Introduction**
 - **Duration:** 4 Days
 - **Who Should Attend:** Those managing, developing or working in a collaborative environment who want to benefit from Microsoft SharePoint technologies. Familiarity with Windows, Office and the Web is assumed.
 - <http://www.learningtree.com/538>

Where Do I Go From Here? (Continued)

- **For other questions, feel free and contact Dux**
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Thank You !

Presentation Summary

- **You are now able to describe the benefits of utilizing SharePoint as a Project Management Information System (PMIS)**
- **In addition, you are able to comprehend SharePoint's capabilities to**
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