



Innovative-e

Effectively Leveraging Project 2010 with SharePoint 2010 for Project Management Success

Dux Raymond Sy, PMP



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Presentation Objectives

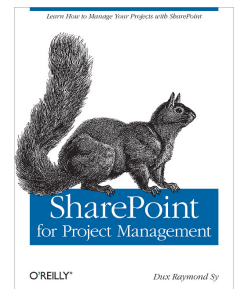
- In this presentation, you will learn how to
 - Effectively create a Microsoft Project Plan
 - Create a SharePoint-based Project Management Information System (PMIS)
 - Integrate Microsoft Project information with SharePoint
 - Empower a project team to collaboratively share relevant information
 - Build a project management dashboard in SharePoint



Dux Raymond Sy, PMP



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Twitter: @meetdux #msproject

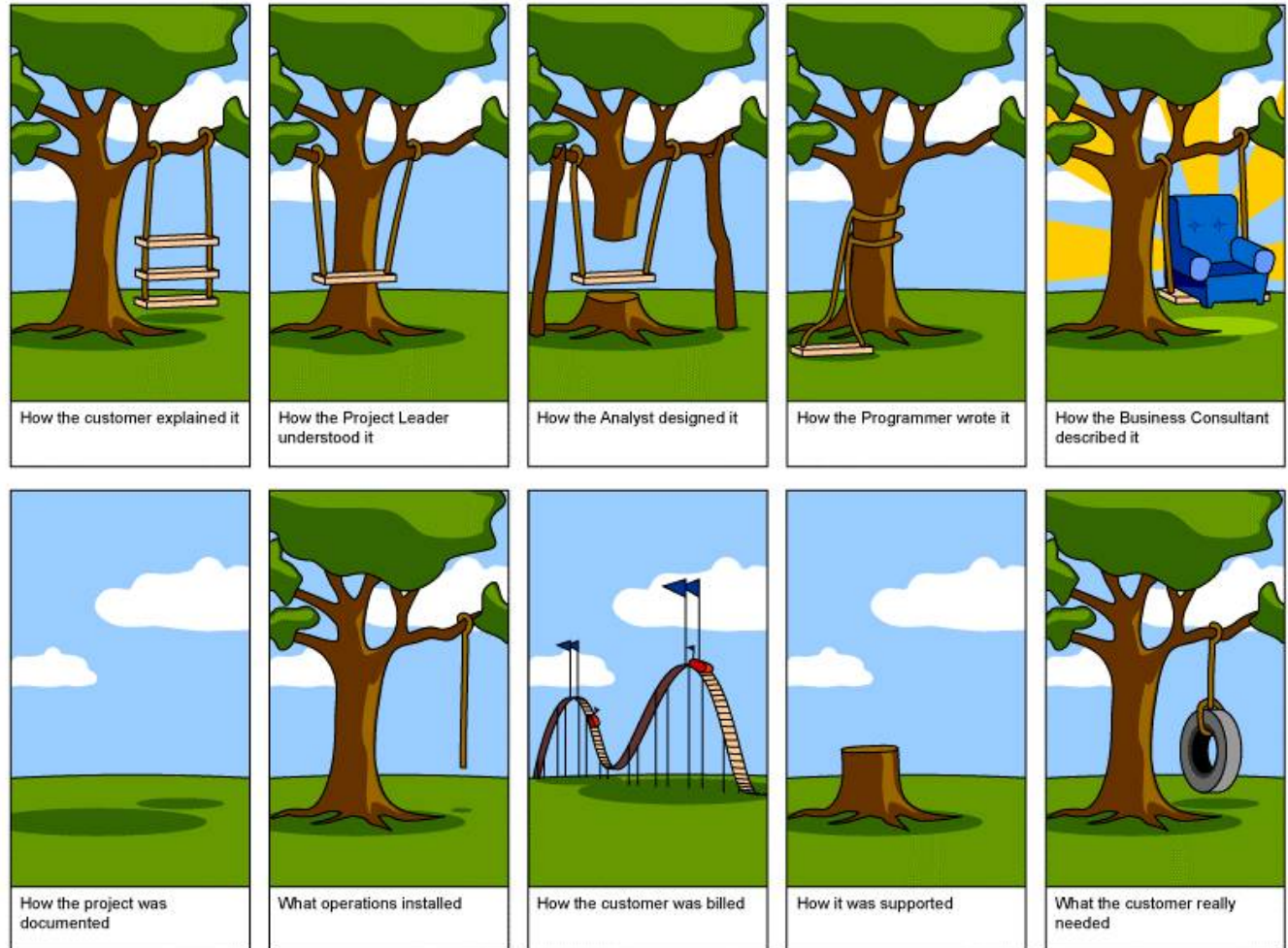


Agenda

- Is Microsoft Project with SharePoint the Silver Bullet?
- Effectively Initiating and Planning Projects
- Facilitating Efficient Team Collaboration
- Tracking and Reporting Relevant Project Status
- Questions and Answers



Look Familiar?



Courtesy of NicksTrafficTricks.com

Twitter: @meetdux #msproject





Let's Get Priorities in Order

- Tools don't run projects
 - Relevant project management process
 - Responsible and accountable people

- Realize that Microsoft Project and SharePoint are tools
 - Relevant project management process is necessary
 - Project definition and initial planning is needed prior to using these tools
 - Project Charter
 - High-level Scope
 - Work Breakdown Structure (WBS)



Project Management Maturity

Level 1: Initial



Level 2: Repeatable



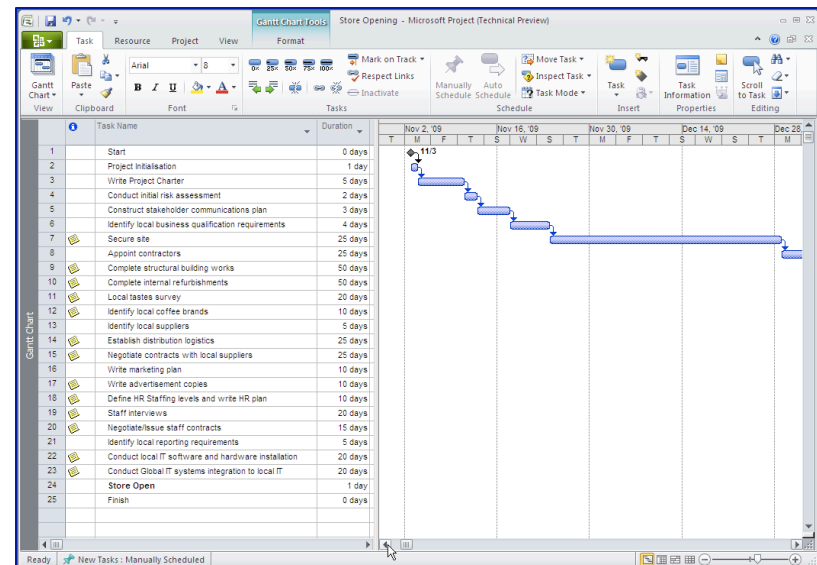
Level 3: Defined

	Level 1: Initial	Level 2: Repeatable	Level 3: Defined
PEOPLE	<ul style="list-style-type: none"> No PM background 	<ul style="list-style-type: none"> Basic PM training 	<ul style="list-style-type: none"> PM Certification
PROCESS	<ul style="list-style-type: none"> Ad-hoc 	<ul style="list-style-type: none"> PM Process Standardized 	<ul style="list-style-type: none"> Automated workflows , portfolio reporting
TOOLS	<ul style="list-style-type: none"> Paper, Word, Excel, Email 	<ul style="list-style-type: none"> Templates, Scheduling and Collaboration Tool 	<ul style="list-style-type: none"> EPM Tool



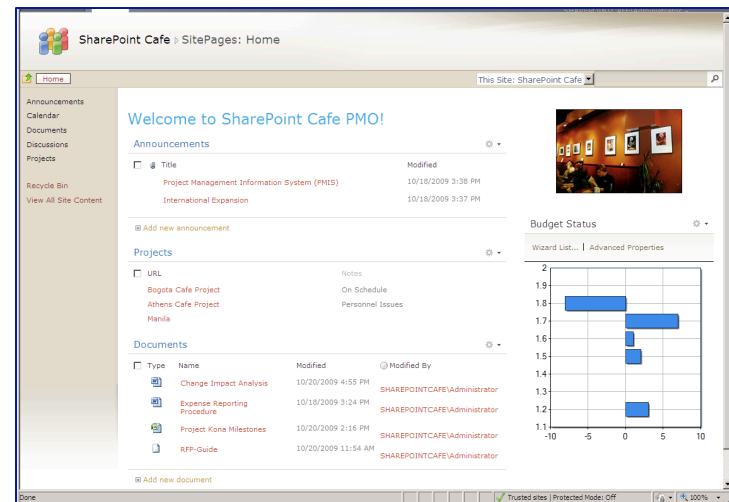
What is Microsoft Project 2010?

- A project management tool that supports
 - Project Schedule development and management
 - Planning
 - Tracking
 - Resource Management
 - Project Reporting
- It assumes that you are familiar with a project management process



What is Microsoft SharePoint 2010?

- The business collaboration platform for the enterprise and the web
- Provides collaborative project management tools to
 - Centralize project artifacts
 - Streamline communication
 - Generate relevant reports
 - Interact with other Microsoft tools





What's a PMIS?

- A Project Management Information System (PMIS) is 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 and maintenance of project artifacts
 - Facilitate communication and feedback
 - Monitor project activities
 - Control project changes
 - Analyze and forecast project performance
- Contains real-time information essential for initiating, planning, executing, controlling, and closing a project





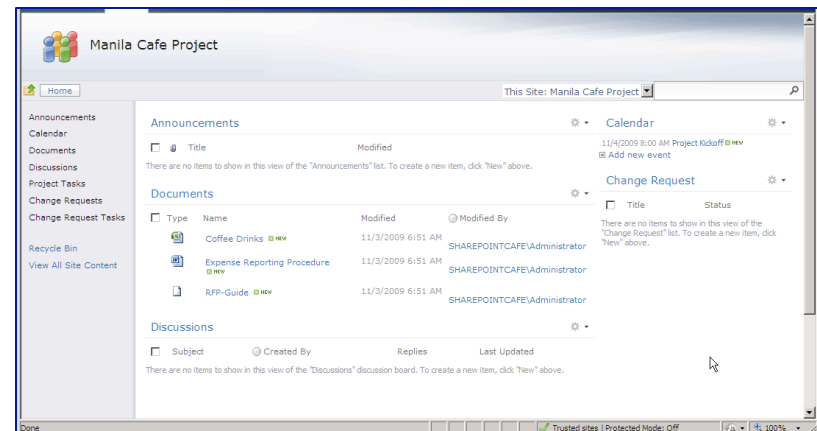
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Create PMIS Upon Project Definition

- Project definition specifies the five w's of the project and success criteria
- As soon as a project is defined, create a SharePoint site to serve as the PMIS
 - Central repository for relevant project artifacts
 - Controlled access to stakeholders
- Ideally, a SharePoint PMIS site template is utilized



How to Get Started with Project Planning

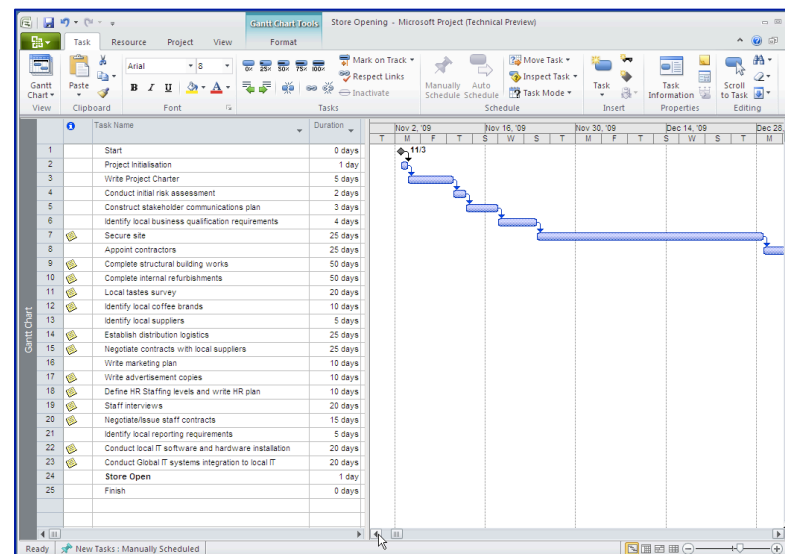
- The initial Work Breakdown Structure (WBS) has to be developed prior to utilizing Microsoft Project
- A WBS is a deliverable based grouping of project tasks
 - An effective way to define and organize all of the work required to complete a project



Project Planning 101: <http://go.meetdux.com/v3qx>

Create Microsoft Project Plan

- Once the WBS is created, create Microsoft Project Plan



Watch: Effectively Planning, Tracking & Controlling Projects with Microsoft Project 2010 <http://bit.ly/aB9vEi>

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Project Collaboration

- What are typical collaborative activities project team members engage in?

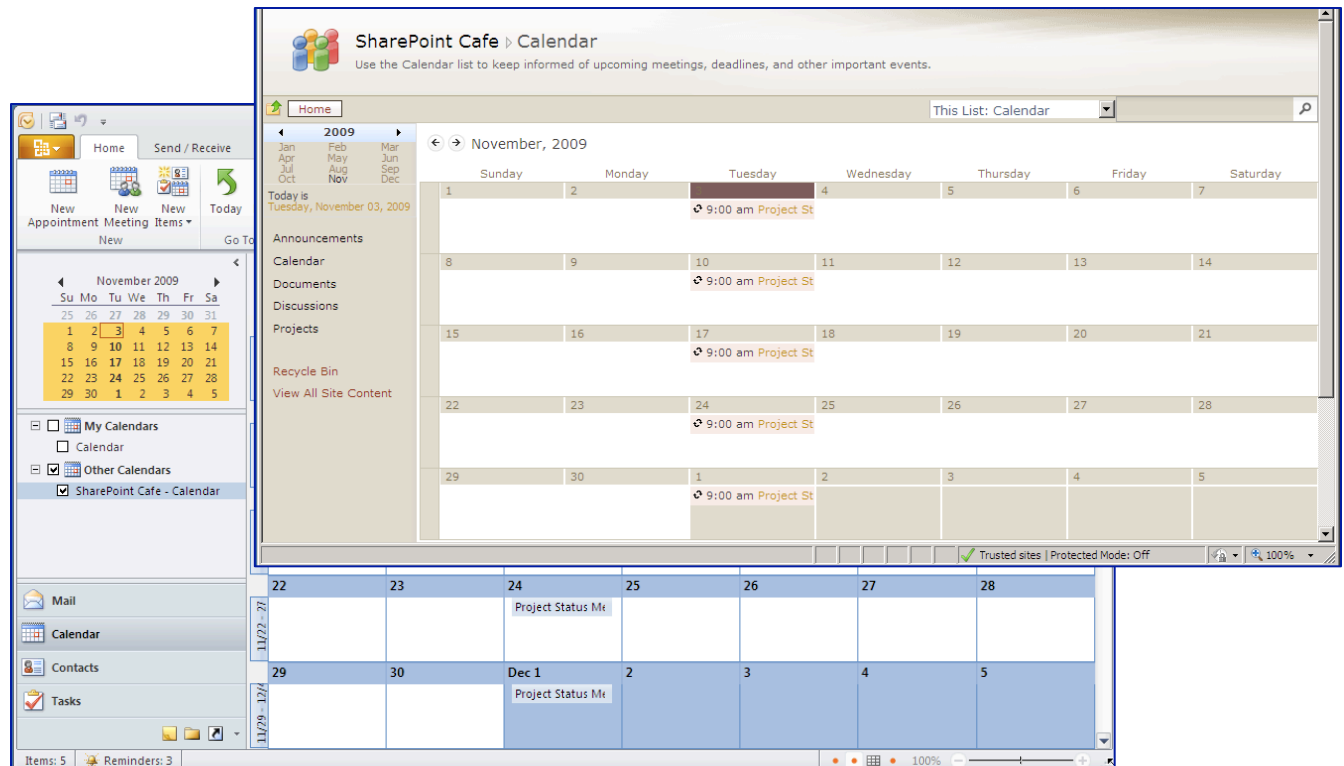


SharePoint Provides Collaboration Tools

- Information Management
 - Centralized Storage
 - Version Control
 - Check-in / Check-out
- Project Activities
 - Requirements Gathering
 - Meetings
 - Documenting Lessons Learned
- Microsoft Office Integration



Example: SharePoint Calendar in Outlook



The screenshot shows the Outlook interface with a SharePoint calendar integrated. The calendar is titled "SharePoint Cafe - Calendar" and displays events for November 2009. The events are "Project St" meetings, each occurring on a Tuesday at 9:00 am. The interface includes a navigation pane on the left with "SharePoint Cafe - Calendar" selected, and a main view showing a monthly calendar grid. The status bar at the bottom indicates "Items: 5" and "Reminders: 3".





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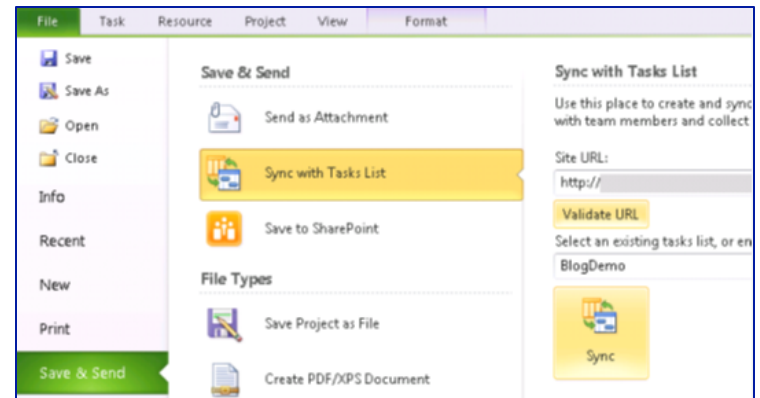
What are you tracking?

- Typical areas that are tracked
 - Schedule
 - Budget
 - Change
- Project tracking entails
 - Monitoring
 - Analyzing
 - Correcting



Leveraging Microsoft Project with SharePoint?

- With Microsoft Project 2010
 - Schedule can be synched with a SharePoint project task list
 - Custom fields can be synchronized as well
- This means that
 - Project resources can enter updates in SharePoint
 - Project managers can synchronize updates with Project
 - Custom field information can be used to generate reports

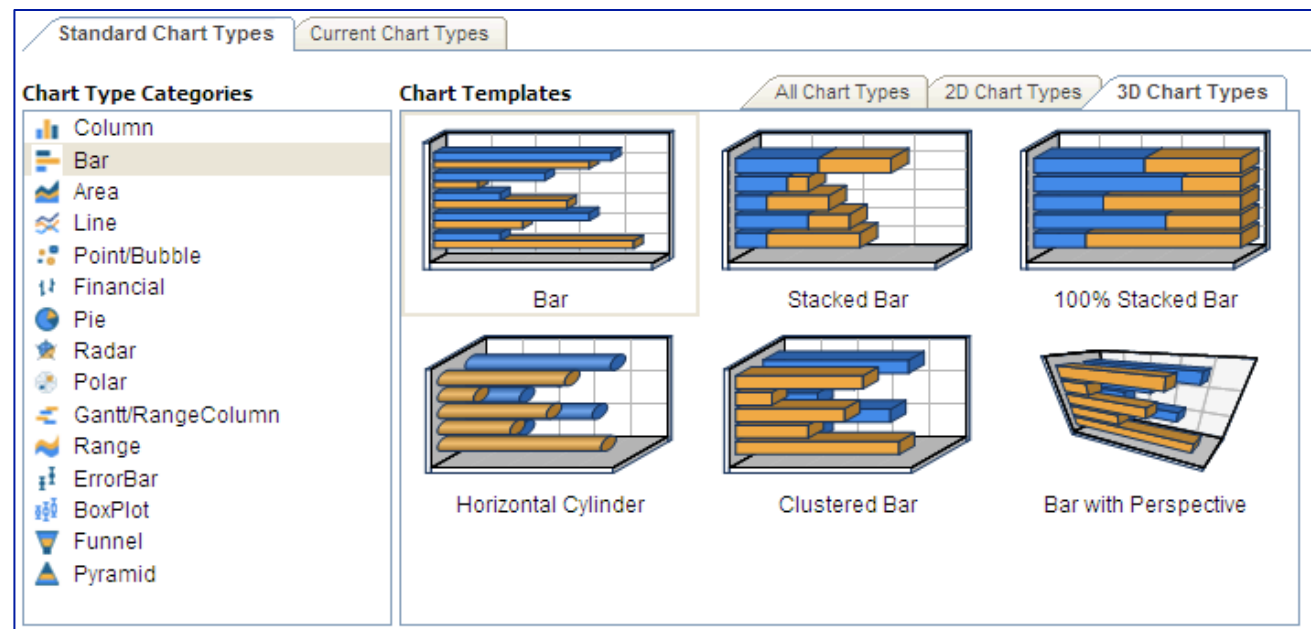


Project 2010 Sync with SharePoint:
<http://bit.ly/YJthK>



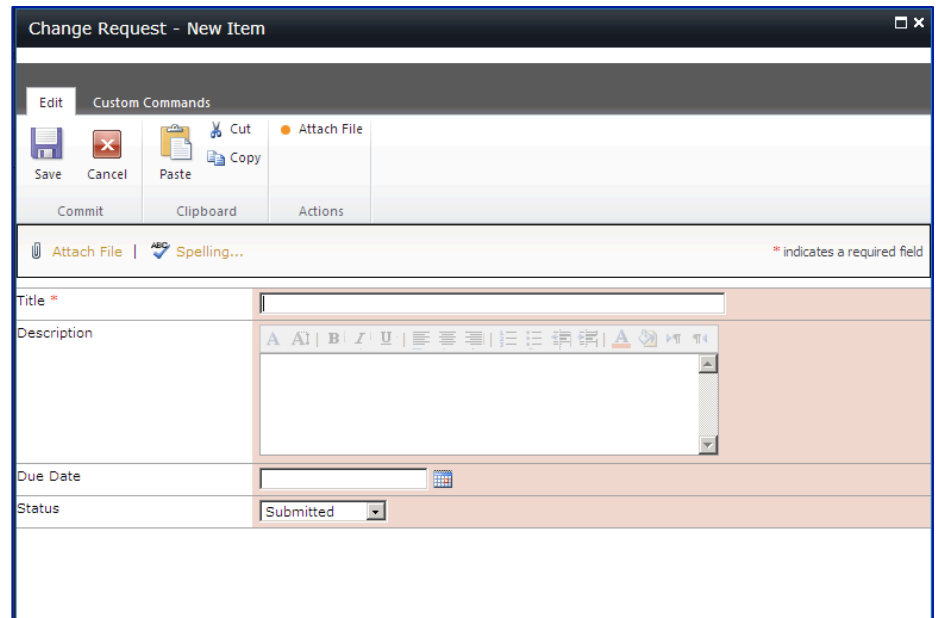
Creating Reports or Dashboards

- Information from the project task list can be displayed in a dashboard through web parts
 - SharePoint 2010 comes with out of the box charting web parts



Controlling Changes with Workflow

- Change request forms can be created with custom lists
- Workflows can be leveraged to facilitate the change control process



The screenshot shows a SharePoint 'Change Request - New Item' form. The form has a title bar 'Change Request - New Item' and a ribbon with 'Edit' and 'Custom Commands' tabs. The ribbon includes buttons for 'Save', 'Cancel', 'Paste', 'Copy', 'Attach File', 'Commit', 'Clipboard', and 'Actions'. Below the ribbon, there are links for 'Attach File' and 'Spelling...'. The form fields include: 'Title *' (required), 'Description' (with a rich text editor), 'Due Date' (with a calendar icon), and 'Status' (a dropdown menu set to 'Submitted'). A note '* Indicates a required field' is visible in the top right corner of the form area.





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Questions?




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