

**Course Name: SharePoint for Project Management**

Area of Study	Classroom Hours:
Project Management <b>Software</b>	14

**Description:**

Microsoft SharePoint is perfect for project management, but most companies don't understand it's power. This hands-on class demonstrates how SharePoint can help you organize and manage complex projects -- a decidedly more productive way to use this popular collaboration software.

You'll learn how to apply common and practical project management concepts in SharePoint, and build a Project Management Information System (PMIS) that can efficiently coordinate communication and collaboration among team members.

Instructor-led classroom with technical labs

If you are a project manager looking for a technology-based, easily implemented, and usable solution for project communications, document management, and general project organization, this class is for you.

- Project Kickoff
  - What Is a PMIS?
  - Deciding to Use a PMIS
  - What Is SharePoint?
  - Our Case Study: SharePoint Dojo, Inc.
  - Setting Up the PMIS How Will You Organize Your PMIS?
  - Using Site Templates
- Creating a SharePoint Site
  - Workshop 2.1: Establishing the SharePoint PMIS Foundation
  - Customizing the PMIS
  - Workshop 2.2: Refining Your PMIS
  - Adding PMIS Components Using SharePoint Lists
- Creating SharePoint Lists
  - Workshop 3.1: Creating and Populating Lists
  - Using Libraries
  - Creating a Document Library
  - Populating a Document Library
  - Workshop 3.2: Creating and Populating a Document Library
  - Organizing Project Information
- Adding Stakeholders to the PMIS Project Communications Plan
  - Site Access in SharePoint
  - Creating SharePoint Groups
  - Adding Site Members
  - Customizing Permissions
  - Workshop 4.1: Adding Site Members
- Supporting Team Collaboration Enabling Document Management Solutions
  - Workshop 5.1: Updating a Project Document
  - Facilitating Team Collaboration
  - Workshop 5.2: Creating a Document Workspace

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## SharePoint Project Management (continued)

### Description (continued):

- Project Tracking
  - Tracking Project Tasks
  - Tracking Risks
  - Workshop 6.1: Updating the Schedule and Tracking Risks
  - Controlling Changes with Workflow
  - Workshop 6.2: Creating a Change Control System with Three-State Workflow
- Project Reporting
  - Custom Views
  - Workshop 7.1: Creating a Custom View
  - Using Web Parts for Interactive Reporting
  - Workshop 7.2: Maximizing Project Reporting with Web Parts
  - Subscribing to Alerts
  - Using Meeting Workspaces
  - Workshop 7.3: Creating a Meeting Workspace
  - Integrating PM Tools Integrating Microsoft Project into SharePoint
- Using Microsoft Office and SharePoint
  - Workshop 8.1: Using Microsoft Project
  - Workshop 8.2: Synchronizing Excel with SharePoint
- Project Closing
  - Creating a PMIS Template
  - Archiving the PMIS
  - Workshop 9.1: Create a PMIS Site Template

### Students enrolled for this course should have the following:

Students should feel comfortable in Internet browsers and a Windows based environment. Have a solid understanding of PM concepts.

### Upon successful completion of this course, students will be able to:

- Learn to apply key project management techniques by leveraging SharePoint as a PMIS
- Track a case study that illustrates the circumstances and processes of an effective SharePoint PMIS
- Appropriately define access permissions for project stakeholders and team members
- Centralize project documents and keep track of document history with version control
- Automate project reporting mechanisms and generate on-demand status reports
- Track project schedules, control changes, and manage project risks
- Integrate project management tools such as Excel, Microsoft Project, PowerPoint, and Outlook