

SharePoint 4 Project Management

Bay of Plenty SharePoint User Group
Tauranga

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Presented by Debbie Spring



Agenda

Background

- Various Methodologies
- Business Processes
- Standards
- Challenges

Demonstration

- Project Initiation Tasks
- Execution
- Team Collaboration

Implementation

- Lessons Learnt
- Future Considerations
- Limitations of SharePoint
- Different Approaches



Background

- Need for Project Management
- Challenges
 - Managing Tasks
 - Issues Management - Vendor
 - Sharing Documents
 - Versions
 - Review of documents
 - Visibility of Team
 - Meetings



Demonstration

Project Overview

- System Upgrade – 1st in 17 years
- Project Team
 - internal staff (IT), Trainers, Project Champions
 - Multiple external vendors, (many systems downstream)
- Multiple locations
- Multiple Work streams
- Stakeholders
- 600 users



Project Management Site

Initiate/Plan

Resource Management

Risk Management

Stakeholder Analysis

Communication Plan

Milestones, Phases

Execute

Task Management

Issues Tracking

Team Meeting Site

Document Management

Team Collaboration

Implement

Training Booking

Go Live Help Desk

Post Implementation Review

Other Surveys



SharePoint Design Elements

- Some out of the box functionality
- Customisation has been to lists, and adding project methodology
- Template entire site, with lists, headings, instructions for future projects
- Close out project, and move relevant lists, documents to records management system, as required
- Use of Microsoft Project
- Permissions and Access



Limitations Of SharePoint

- Surveys
 - Output needs Manipulation
- Roll UP across sites, and lists
- Printing direct from lists
- Reporting
- GANTT chart, Dependencies, Critical Path



Future Considerations

- Reporting From existing Site information
- Roll ups Across multiple projects/lists/sites
- Email Management
- Automatic Creation of new sites based on SIZE
- Scanning and Automatic Uploads
- Integration with other systems
 - Issues and Risk Management with Enterprise Reporting
 - Cost Management with Financial Systems
 - Customer Relationship Management

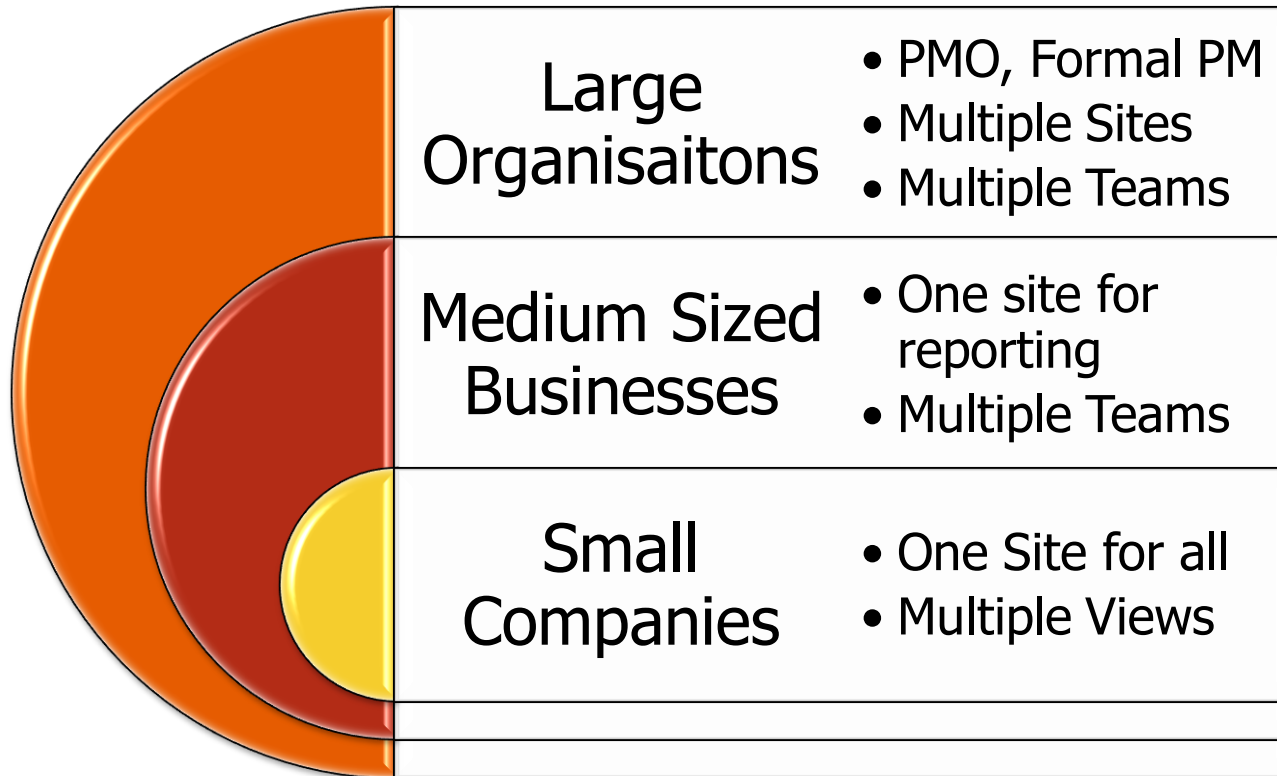


Lessons Learnt

- People
 - Buy in from Project Team, Champions
 - Training
- Process
 - Change in way we worked as a team
 - Email, Documents, Visibility
- Infrastructure
 - Enabling Projects
 - Layout and Design



Different Approaches



SharePoint for Project Management

- Control standards and storage
- Centrally manage and access documents
- Streamline Business Processes

Manage Content and Processes

- Critical data in ONE place
- Quickly Connect People with information
- Reduce Risk

Improve Business Insight

- Microsoft Office
- In House Apps
- Empower users

Single Integrated Platform

- Knowledge
- Information
- Communication
- Connect People

Share Amongst Teams