

SharePoint 2010 for Project Managers – 1 Day Advanced

This one-day course is designed to equip Project Managers with the knowledge of customizing SharePoint to use as a project management system using SharePoint Server and Microsoft Project. Along with the other Microsoft Office suite of products, attendees will develop skills to design, implement, and deploy sites and projects.

Audience and Prerequisites:

Students should meet the following prerequisites:

- A working knowledge of SharePoint 2010 sites, lists, and libraries.
- A general knowledge of managed business processes.
- A basic understanding of project management fundamentals.
- Solid working knowledge of Microsoft Project.

Course Outline

Chapter 1: Setting Up the Project Management System

- Site Design
- Site Templates
 - Exercise 1.1: Creating the Fund Raiser Project Site
- Interface Elements
 - Exercise 1.2: Navigating through the Fund Raiser Project Site
- Modifying Default Settings
 - Exercise 1.3: Modifying Default Settings
- Adding Stakeholders
- SharePoint Default Groups
- Creating New Groups
- Permissions
- Changing Permission Inheritance for a Site
 - Exercise 1.4: Customizing Permissions and Groups

Chapter 2: Adding Components to the Project Management System

- Working with Lists
- Sorting and Filtering Lists
- List Views
 - Exercise 3.2: Using Views
- Creating Lists
 - Exercise 3.3: Creating the Contacts, Project Tasks, Resources, and Risks lists for the Project Management System

- Customizing Lists
- Customizing Columns in a List
- Customizing List Views
 - Exercise 3.3: Customizing Lists for the Project Management System

Chapter 3: Project Collaboration

- Collaboration Options
- Document Management Solutions
- Versioning
- Check in/Check Out
- Alerts
- Send To
 - Exercise 3.1: Configuring Document Management Settings
- Blogs
- Creating a Blog Site
 - Exercise 3.2: Creating a Meeting Minutes Blog Site
- Customizing Blog Categories
- Creating a Blog Post
 - Exercise 3.3: Creating a Meeting Blog Post
- Wikis
- Creating a Wiki Library
- Editing a Wiki Page
- Adding a New Wiki Page
 - Exercise 3.4: Creating a Frequently Asked Questions Wiki
- Discussion Boards
- Creating a Discussion Board
- Adding a Discussion Topic
- Editing a Discussion Topic
- Responding to a Discussion Topic
 - Exercise 3.5: Creating a Discussion Board

Chapter 4: Creating Automation through Workflows

- Workflow Lists
- Three-State Workflow
- Configuring a Workflow
 - Exercise 4.1: Automating the Risks workflow
- Executing a Workflow
 - Exercise 4.2: Executing the Risks workflow
- Reviewing Workflow Details
 - Exercise 4.3: Reviewing the Risks workflow
- Terminating a Workflow
- Removing a List Workflow

Chapter 5: Integrating Other Tools

- Microsoft Outlook
 - Exercise 5.1: Connecting SharePoint Lists to Outlook

- Microsoft Excel
 - Exercise 5.2: Importing a Microsoft Excel File into a SharePoint List
 - Exercise 5.3: Synchronizing a Microsoft Excel File with a SharePoint List
- Microsoft Project
 - Exercise 5.4: Synchronizing Microsoft Project with the Project Management System