



Building a Project Management Portal with SharePoint

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Introduction

Allen Ruddock

Director and co-founder of Transformis Consulting Ltd

- *project and programme management specialists*

- *In the 6 years since launching Transformis Allen has been working with clients to establish and develop their project and programme management capabilities. Through its consultancy and training offerings, and its range of experienced associates Transformis is ideally suited to support clients seeking to build their delivery capabilities in these areas. Prior to that he spent over 20 years working for a number of blue-chip organisations and has been part of, or led a number of initiatives to build an organisational project management capability.*

The consequences?

- Lack of standardisation
- Inability to resource plan across projects
- Reporting headaches
 - Export/import at best
 - Manual re-keying the norm
- Documentation fragmented and hard to find
- Risks and issues dispersed
- Little or no knowledge sharing

Is there a better way?

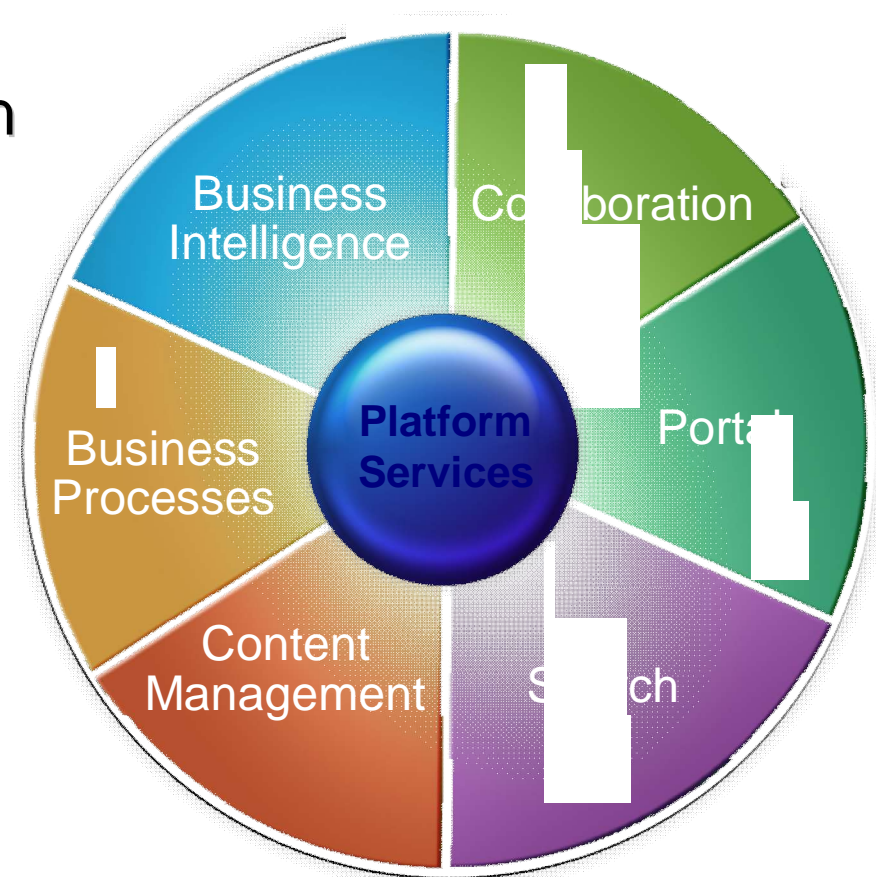
We've seen the problems with EPM

- Failure to understand the requirement
 - Must be business need driven, not feature driven
 - Must support processes, not add to them
- Lack of focussed training
 - Product driven training rather than how to use it here
- Over ambitious launch
 - Too much, too soon
- Lack of executive sponsorship
 - No support to change how things are done
- Over-engineered solutions
 - Too elaborate and expensive - KISS
- Lack of on-going support and training
 - Projects are dynamic – resources change

SharePoint for Project Management

- A collection of tools built on a foundation of Platform Services to facilitate:

- Collaboration
- Content Management
- Business Intelligence
- Search
- Business processes
- Portal delivery



SharePoint versions

- **Windows SharePoint Services 3.0**
 - Core platform, collaboration, document management, basic workflow, search and project management
- **Microsoft Office SharePoint Server – Standard**
 - More workflow, policy and records management, site personalisation, enterprise and people search
- **Microsoft Office SharePoint Server – Enterprise**
 - Business data integration and search, forms processing, Excel services, dashboarding

What do you want from a PM site?

- Announcements
- Calendar
- Contacts
- Document store
- Tasks
- Issues
- Risks
- Dependencies
- Change requests
- Holiday approval & tracking
- Cost tracking
- Expenses approval

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PM Portal *SharePoint*

Also see.....

- TCL's SharePoint Project Management Portal
- TCL's Effective Enterprise Project Management solutions with Microsoft EPM

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Any questions?