

# SharePoint® 2010 for Effective Project Management

*A manual by **Advisicon**®*

*Helping You Build a Project Management Culture*



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## **The Purpose of This Book**

The purpose of this book is to assist teams in communicating and collaborating more efficiently with the use of the SharePoint technology. One of the immediate benefits of using SharePoint is that organizations can improve consistency in the standardization, optimization, creation and use of Sites and Workspaces in SharePoint. This book is designed to familiarize end users with the different capabilities, options, and ways to apply SharePoint (namely, SharePoint Foundation) in supporting teams.

This book is designed to assist team leaders, team members, management, executives and stakeholders in understanding how to best use the components of SharePoint in support of organizational initiatives. It includes industry best practices used by managers and team members to better manage and create results with technology leading to higher productivity and return on investment.

We have included a Glossary of terms at the end to familiarize you with terminology.

We hope that you enjoy this reference book. Please feel free to provide your comments or feedback to Advisicon, Inc. through our web site at [www.Advisicon.com](http://www.Advisicon.com).

# Identification and Notices

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## About Advisicon

Advisicon is a professional project and portfolio management consulting, training and custom application development company. Advisicon helps our clients leverage the best practices of project management methods and technologies to manage projects more effectively.



Advisicon is a Registered Education Provider (REP) of the Project Management Institute (PMI), giving clients the confidence that they have chosen an organization that is well qualified to provide the instruction they need as well as the convenience of receiving Professional Development Units (PDUs).



Advisicon is a Microsoft® Gold Certified Partner with Enterprise Project Management (EPM), Information Worker, and multiple other advanced certifications. Advisicon helps organizations use Microsoft Project, Microsoft Office Project Server and SharePoint Services to manage their projects more effectively through optimization, training in best practices, and process and template development. Advisicon's consultants deliver deep expertise to our clients to help them use MS Project more effectively to deliver sustained results.



### Our People



Advisicon's team of professionals includes Project Management Institute certified Project Management Professionals (PMPs), Microsoft Certified Professionals with specializations in Enterprise Project Management, Networking and Infrastructure Solutions, and Microsoft MVPs.

### Our Philosophy

Advisicon is about delivering: Optimization, Knowledge Transfer and Sustained Results.

### Our Services

- Microsoft Project and Project Server Deployments, Consulting and Training
- SharePoint Deployment, Custom WebPart Development, and Training
- Microsoft Access & SharePoint Application Development, Consulting and Training (see back of book for contact information or check our website, [www.Advisicon.com](http://www.Advisicon.com))
- Project Management Office Formation and Development
- Project and Portfolio Management Consulting and Training
- Project Management Maturity Assessments
- On-Site Project Management Support
- Custom Application and Database Development



## Our Team

- Project Management Institute-certified PMPs
- Microsoft® Certified Professionals (specializations in Enterprise Project Management, Networking and Infrastructure Solutions)

Advisicon serves clients in every type of industry including business, government, and non-profit. Our services span international companies in North, Central and South America as well as Europe and Asia Pacific.

Visit Advisicon's website to read case studies of how Advisicon has helped clients, or to learn more about our services and products, contact Advisicon at 1-866-36-ADVISE or visit us at [www.Advisicon.com](http://www.Advisicon.com).

## About the Authors



### Tim Runcie, MCTS, MCP, PMP, MVP, Advisicon President

Tim Runcie, the President of Advisicon, has over 20 years of experience in Information Systems and 12 years in Construction Management. Tim has been recognized by Microsoft as an MVP (Most Valuable Professional) for his outstanding excellence in Office and for his support to technical communities worldwide. He was first recognized as an Access MVP and has continued to gain recognition as a Project Portfolio Manager (PPM) in Enterprise Project, Program and Portfolio Management MVP for his expertise in MS Project, Project Server & SharePoint.



Tim has been assisting Project Management Offices and Organizations (PMOs) in leveraging technology like Access, Project, Project Server & SharePoint to meet their business intelligence and reporting needs. His experience covers all sectors of customer industries such as Government, Non-Profit, Private Business, Manufacturing, Construction, Banking, Healthcare and the Information Services or Information Technology industries.

He has focused in consulting, mentoring and training organizations to successfully complete their projects using scarce resources, fixed budgets and interconnected schedules, while leveraging technologies to automate and create powerful visual reports. Tim combines industry best practices, a passion for knowledge transfer, and tools development to optimize Project and Project Portfolio Management processes and to successfully integrate Project Management best practices into organizations' culture.

Tim loves teaching. When not leading or mentoring organizations, he is teaching classes centered on the disciplines and technologies of Project Management. To every project he brings a personal passion for education and a commitment to providing Advisicon's customers with a full set of skills and tools to achieve optimum success.



### A. Lynn Jesus, MCTS, Project+, PMP

Lynn is an Education Advisor with Advisicon, Inc. She brings 15+ years of experience in managing projects and sharpened skills that are transferable to a multitude of environments. She also holds the prestigious Project Management Institute (PMI) Project Management Professional (PMP) credential, as well as an MCTS (Microsoft Certified Technology Specialist) in Project, MOS (Microsoft Office Specialist) in SharePoint 2010, and the Project+ (CompTIA) certifications.

Lynn has developed curriculum and taught project management and technology best practices, and PMI certification exam prep for the CAPM (Certified Associate of Project Management) and PMP exams. She has also contributed to industry white papers, blogs, vlogs and book content focused on the Microsoft Enterprise Project Management (EPM) solution.

Lynn is an active presenter and contributor to communities of practice. She has presented to several professional groups such as PMI, SharePoint User Groups, Project Management Groups, as well as SharePoint Saturday Bend. A true believer in knowledge transfer, Lynn strives to bring her zeal for these technologies and applications to

audiences. She loves teaching and is passionate in blending her extensive experience and knowledge in client consulting and training engagements to customers and students, so they can continue to build upon their own skill set.



## Stowe St. Pierre, MCTS

Stowe is a Senior Solutions Architect with Advisicon, Inc. He brings over 10 years of experience in SharePoint development and Information Technology. He also holds the prestigious Microsoft Certified Technology Specialist (MCTS) certification.

Stowe is creative and innovative with strong problem solving skills. He possesses an outstanding customer-focused reputation. He is dedicated to meeting expectations and requirements of internal and external customers with exceptional communication skills. His extensive experience allows him to work well with all levels within an organization from operations staff to senior level management.

Stowe strives to provide his clients with the best technical experience available, while leaving them educated and prepared to manage future projects.



## Cindy M. Lewis, MCTS, MCITP, MCT, PMP, PMI-SP

Cindy is a Senior Project Advisor at Advisicon, Inc. She brings 17 years of experience in training and managing large projects. As a professional project manager, Cindy has focused her career on Information Technology projects specializing in company-wide system implementations spanning industries such as financial, manufacturing, medical, education and high tech. Cindy has in-depth expertise in lifecycle management, organizational project/portfolio process development and management, and customized curriculum development and execution.

Cindy has been a sought-after consultant called on to help numerous companies both locally and across North America to assist and rescue failed Project Server implementations in Project Server 2002, 2003, and 2007. In Project Server 2010 Cindy has captured complex business requirements and delivered a best in case solution recommending features that derive value for the business and provided consultative training to apply these features immediately. She has deployed Project Server 2010, deployed Proof-of-Concept instances and has directed Project Server 2007 to Project Server 2010 upgrades.

Cindy also enjoys leading large groups and has provided extensive training on Microsoft Project via both live and virtual classrooms. In addition to teaching, she has taken a role as the lead author on courseware development for new courses on Microsoft Project and Project Server.



## Comments & Feedback

We are interested in your feedback about this publication. It is our goal to continually improve our books and resources and to enhance your learning experience. Please email us at [info@Advisicon.com](mailto:info@Advisicon.com), and let us know your thoughts.

We look forward to hearing from you. Happy learning!





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## Legend of Icons in this Book

### PMBOK reference



The PMBOK icon and call-out box refers you to where you can find a concept or term in the Project Management Institute's Project Management Body of Knowledge – The PMBOK.

### Note



The Note icon and call-out box indicates a key fact or insight to help participants better understand helpful background information, quirks, explanations for the way things work, answers to Frequently Asked Questions (FAQs), and helpful things to remember.

### Tip



The Tip, Trick and Shortcut icon and call-out box presents quick ways to do things faster and impress colleagues.

### Warning



The Warning icon and call-out box will draw your attention to important risks, pitfalls, potential issues, and alternate concepts that may assist you with managing your project processes.

