

Project Management Hints for **Training Specialists**



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Microsoft Project is a wonderful tool for training managers, developers, human resource specialists and others who manage complex projects, such as creating content for training or developing an e-learning course. However, long gone are the days of one person driving a project from start to finish. Often times it requires input from a variety of highly skilled experts that involve teamwork, co-operation and a systemic workflow.

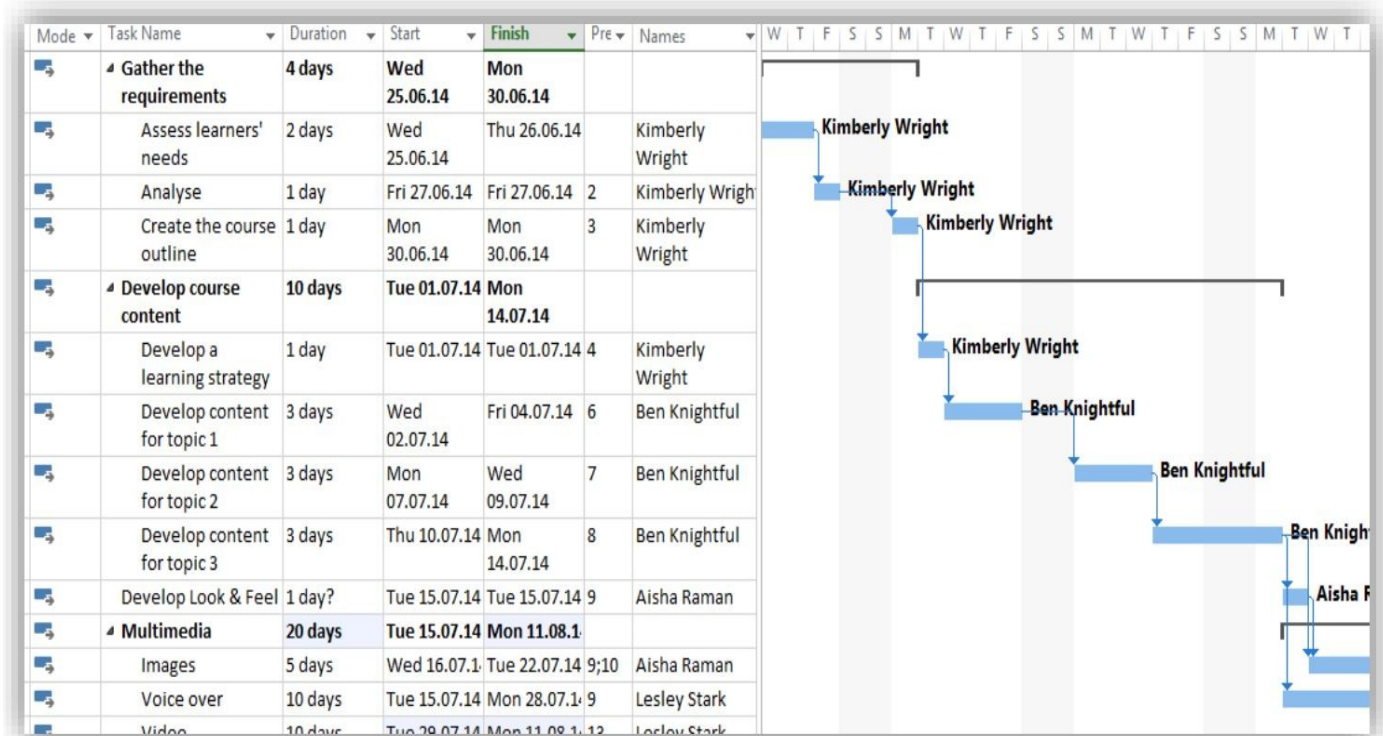
Making sure you and your team members have all the latest project information can be a challenge. This white paper will address how project managers can keep their teams better connected and centralize their project information and communications with task lists.

Getting in Sync

Whenever multiple people are working together on a joint project or initiative you need some way of effectively communicating what everyone is supposed to do. You also need to track what everyone has (or has not) done in order to manage the project properly to deliver on time. As a project manager, it's often frustrating and takes a lot of time and effort to build and update a work plan. Processing updates into the work plan is a manual effort and limits a project manager's ability to focus on other areas of their responsibility.

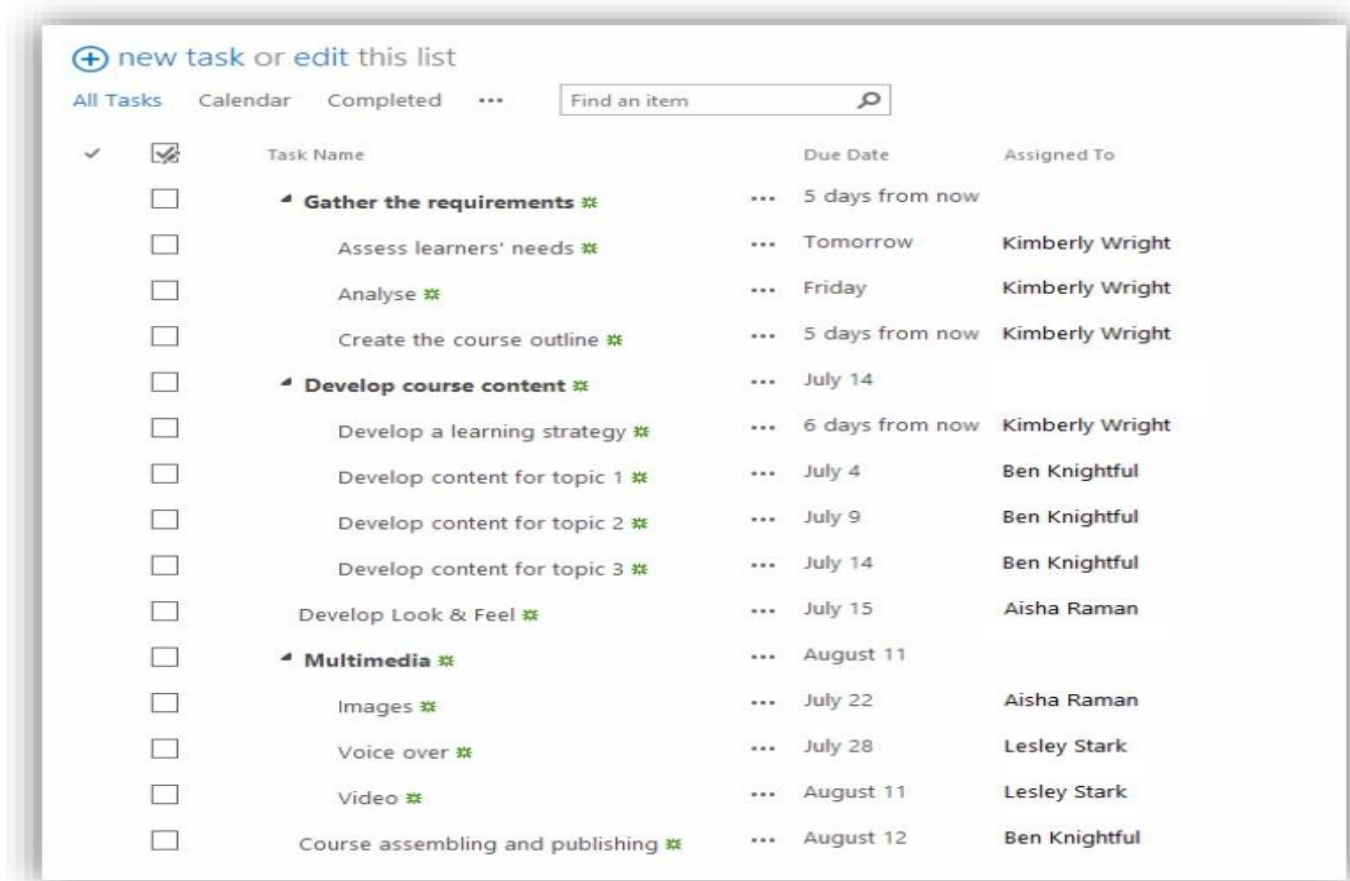
By using the sync feature between Microsoft Project and Microsoft SharePoint, it allows the project schedule to be maintained in Microsoft Project while seamlessly communicating and collaborating around that plan with your team in SharePoint.

For instance, let's assume you are going to develop an e-learning course. Your project is planned, resources assigned and wonderful Gantt chart created. How will your team members know what tasks they are assigned? Will you send them emails and wait for responses? Do you have a system in place to track due dates?



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By syncing all this information into SharePoint, it will automatically create a team site for your members that includes a project summary, timeline, task list and calendar. Your team members can now view the schedule, update their work status, and make other changes in SharePoint, and you'll see those changes in Project. A perfect way to share project information with the entire team, engage team members in solving problems, and to keep everyone in the loop about what's going on with the project.



The screenshot shows a SharePoint task list interface. At the top, there's a header with a plus icon and the text "new task or edit this list". Below this are tabs for "All Tasks", "Calendar", and "Completed", followed by a search bar labeled "Find an item". The main content area is a table with columns for "Task Name", "Due Date", and "Assigned To". The tasks are organized into a hierarchy with expandable sections: "Gather the requirements", "Develop course content", and "Multimedia". Each task has a checkbox on the left and a small icon on the right. The due dates are relative to the current date, and the assigned team members are listed in the "Assigned To" column.

✓	<input checked="" type="checkbox"/>	Task Name	Due Date	Assigned To
	<input type="checkbox"/>	▸ Gather the requirements	... 5 days from now	
	<input type="checkbox"/>	Assess learners' needs	... Tomorrow	Kimberly Wright
	<input type="checkbox"/>	Analyse	... Friday	Kimberly Wright
	<input type="checkbox"/>	Create the course outline	... 5 days from now	Kimberly Wright
	<input type="checkbox"/>	▸ Develop course content	... July 14	
	<input type="checkbox"/>	Develop a learning strategy	... 6 days from now	Kimberly Wright
	<input type="checkbox"/>	Develop content for topic 1	... July 4	Ben Knightful
	<input type="checkbox"/>	Develop content for topic 2	... July 9	Ben Knightful
	<input type="checkbox"/>	Develop content for topic 3	... July 14	Ben Knightful
	<input type="checkbox"/>	Develop Look & Feel	... July 15	Aisha Raman
	<input type="checkbox"/>	▸ Multimedia	... August 11	
	<input type="checkbox"/>	Images	... July 22	Aisha Raman
	<input type="checkbox"/>	Voice over	... July 28	Lesley Stark
	<input type="checkbox"/>	Video	... August 11	Lesley Stark
	<input type="checkbox"/>	Course assembling and publishing	... August 12	Ben Knightful



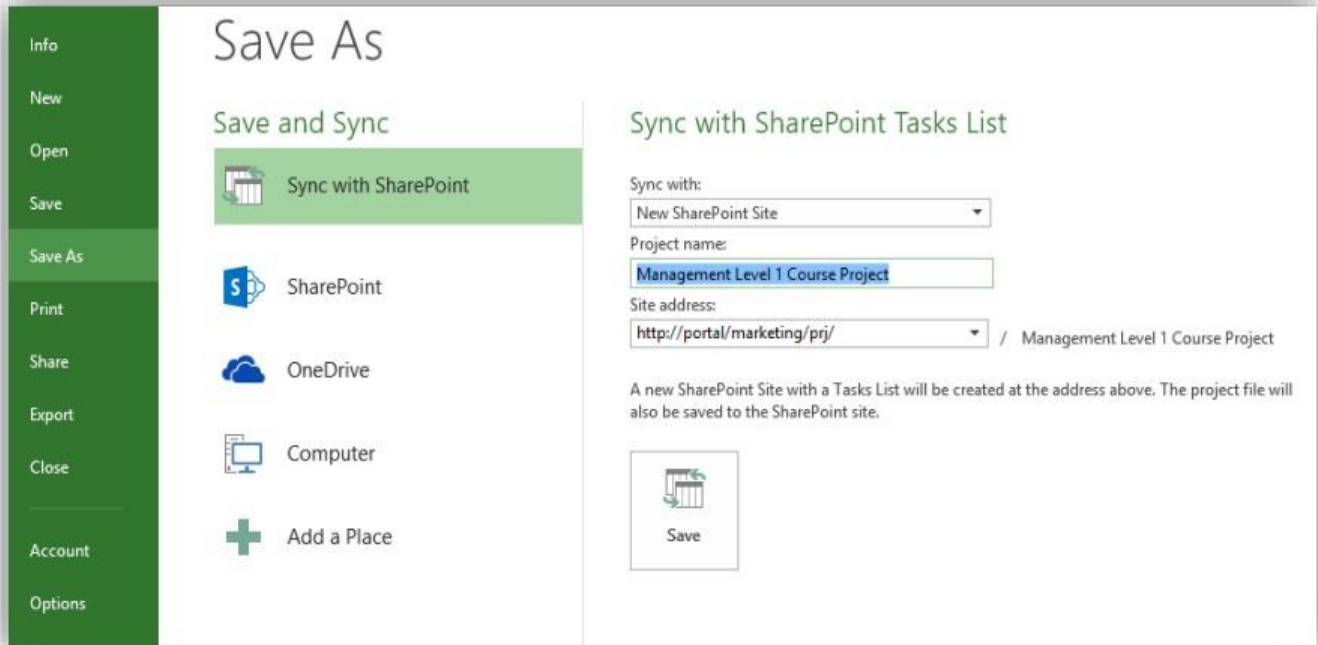
Smart Project Management with SharePoint

Sharing Project Info in SharePoint

Say you just added the finishing touches to a Project schedule and want to share the file with your team members via a SharePoint site. If you have the file open in Project, you can save it from there.

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1) In Project, click File > Save. 2) In the Sync with list, select New SharePoint site. 3) In the Project name box, type a name. 4) In the Site Address list, add the address of the SharePoint tasks list that you will sync to. 5) Click save.



Here's what will happen: When you click Save, a new SharePoint site is created for the project. Changes you make to tasks in Project are reflected in SharePoint, and vice versa.

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Saving a SharePoint Task List in Project

Creating a list of tasks on a SharePoint site is an easy way to start a project schedule. For simple projects, creating and managing tasks on the SharePoint site may be enough. But, if your simple project morphs into something bigger, you can save your SharePoint Tasks List to Project, and then use Project's more comprehensive tools to keep the schedule under control

- 1) Open the task list you want to save in Project by clicking Site Contents on the SharePoint site home page, and then clicking the icon for the appropriate Tasks list.
- 2) In the ribbon, click the list tab. Then in the Connect & Export section, click "Open with Project."
- 3) Click save. A "Sync with Task List" message box tells you the progress it's making. When it's complete, the tasks in SharePoint appear in the current Project view.

From now on, you can sync any changes you make in Project or SharePoint. As you know all too well, a project is dynamic, so you'll want to synchronize future changes, whether they occur in Project or SharePoint. Fortunately, synchronizing is easy: once your Project file is connected to a SharePoint Tasks List, you can sync the two simply by saving the Project file within Project.

Helpful Tip

If you and someone on your team both modify the same field – one in Project and the other in SharePoint – when you go to synchronize, Project will display a conflict dialog box, which includes a Microsoft Project Fields column and a SharePoint Fields column. The fields whose value differs between the two are highlighted. For each conflict, you need to specify whether to keep the value from Project or SharePoint. To keep a value from Project, in the conflict's Version column, click the down arrow and then choose Microsoft Project Version. To use the value from SharePoint, click the down arrow, and then choose SharePoint Version instead. After you've specified which Version to keep for all the conflicts, click the Continue Sync button.

Key Benefits of using Project and SharePoint together

L&D Social Features for SharePoint Dummies

- Syncing the two platforms saves both the team member(s) and the project manager precious project hours that they can focus on other areas of their responsibility.
- Offers the best of both worlds – you can use Project scheduling features while still easily sharing tasks with your team.
- Team members can access Project task lists and info anywhere, anytime. Syncing Project and SharePoint is great for those who do not have Microsoft Project installed on their desktop.
- Empowers the project team and facilitates team collaboration.
- Increase productivity – no detail falls through the cracks.
- Effectively manage resources.
- Powerful security features to share information and collaborate with trusted business partners on projects.

We hope you enjoyed this eBook and found the information we provided helpful. If you would like to learn more about ShareKnowledge, please click on the link at the bottom of this page.

