Portfolio Management and Resource Tracking using SharePoint.

Emma Murphy
Solution Specialist at BrightWork

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Best Practices & Executive Summary

1. Top reasons why SharePoint is AWESOME for project management.

2. Crucial components of project & portfolio management sites.

3. How to manage and track resources in SharePoint with configurable reports.

Live Questions & Answers!
Why SharePoint?

- Can be extended with Tools like BrightWork
- Easily Structured
- SharePoint is Cost effective
It all Starts at the Project Level
(Processes, Metadata, etc.)
Organize Your Portfolio

Project Hierarchy

- Sample Area
  - Business Project Office (PO)
    - Contoso IT (PO)
      - Hardware Upgrade (PStd)
      - Hardware Upgrade Global (Pstr)
      - SharePoint Hyper-V Deployment (PL)
      - Support Work Tracker (WT)
  - Contoso Marketing (PO)
    - Web Site Build (Phase Gate)
  - Customer Services (PMO)
    - Morocco (ITPM)
    - Report Definition Builder (ASM)
  - Help & Support (IO)
    - External Customer Help Desk (IM)
    - Internal Customer Help Desk (IM)
Report!
What is BrightWork?

- SharePoint Solution
- Project and Portfolio Management
- Delivers Immediate Visibility & Control
- Flexible to Evolve and Mature as Needed
Try BrightWork for Free!

Project Management Success, on SharePoint

BrightWork is a SharePoint project management application that includes a range of best-practice templates and advanced cross-project reporting.

Get our Free Templates

Start managing projects on SharePoint with our free best-practice templates.
1. Top Reasons why SharePoint is AWESOME for Project Management.
Why is SharePoint **AWESOME** for PPM?

- **The Foundation version of SharePoint** is available at no extra cost.
- **Create no-code collaborative Team Sites**
- **Customize your team sites** to match your organization's processes.
- **Extend SharePoint** with other project management tools (e.g., BrightWork)

The Details...
Project Management Process – Flexibility!
2. Crucial **Components** of Project & Portfolio Management Sites.
Start at the Project Level
### Process: Tasks in WBS View

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Assigned To</th>
<th>% Complete</th>
<th>Issue Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Project Summary</td>
<td></td>
<td></td>
<td></td>
<td>0 %</td>
<td>No</td>
</tr>
<tr>
<td>Summary Task 1</td>
<td>March 3</td>
<td>May 29</td>
<td><img src="image" alt="Jonathan Weisglass" /></td>
<td>15 %</td>
<td>No</td>
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<tr>
<td>Identify suppliers</td>
<td>March 3</td>
<td>March 3</td>
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<td>100 %</td>
<td>No</td>
</tr>
<tr>
<td>Create draft budget for upgrade</td>
<td>March 4</td>
<td>March 11</td>
<td><img src="image" alt="Jonathan Weisglass" /></td>
<td>50 %</td>
<td>No</td>
</tr>
<tr>
<td>Create draft plan for upgrade</td>
<td>May 16</td>
<td>May 29</td>
<td><img src="image" alt="Jonathan Weisglass" /></td>
<td>0 %</td>
<td>No</td>
</tr>
<tr>
<td>Get Budget Signoff</td>
<td>May 16</td>
<td>May 29</td>
<td><img src="image" alt="Jonathan Weisglass" /></td>
<td>0 %</td>
<td>No</td>
</tr>
<tr>
<td>Create final version of upgrade plan</td>
<td>May 16</td>
<td>May 29</td>
<td><img src="image" alt="Jonathan Weisglass" /></td>
<td>0 %</td>
<td>Yes</td>
</tr>
<tr>
<td>Summary Task 2</td>
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<td>May 29</td>
<td><img src="image" alt="Jonathan Weisglass" /></td>
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<td>No</td>
</tr>
<tr>
<td>Schedule meeting to decide on suppliers</td>
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<td>May 29</td>
<td><img src="image" alt="Jonathan Weisglass" /></td>
<td>25 %</td>
<td>No</td>
</tr>
</tbody>
</table>
Process: Deliverables

- Project Home
- Project Help
- Initiate & Plan
  - Project Statement
  - Tasks Update
  - Task Reports
- Documents
  - Execute & Control
    - My Work Reports
    - Work Reports
    - Issues Update
    - Issue Reports
    - Status Reporting
- Site Contents

+ new document or drag files here

<table>
<thead>
<tr>
<th>All Documents</th>
<th></th>
<th></th>
<th></th>
<th>Checked Out To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
<td>BrightWork Workflow</td>
</tr>
<tr>
<td>Project Proposal</td>
<td></td>
<td>June 20, 2013</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BrightWork
Process: Issues with Assignments
Organize Your Portfolio

Project Hierarchy

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    - Contoso IT (PO)
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      - Hardware Upgrade Global (Pstr)
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    - Morocco (ITPM)
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    - External Customer Help Desk (IM)
    - Internal Customer Help Desk (IM)
3. How to Manage and Track Resources in SharePoint with Configurable Reports.
<table>
<thead>
<tr>
<th>Open Items By Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assigned To:</strong></td>
</tr>
</tbody>
</table>

### Work Rollup Reporting

**Work Rollup Reporting**

- **Assigned To:** Elizabeth Shorn (2)
- **Assigned To:** Jonathan Browne (5)
- **Assigned To:** Peter Doyle (1)

#### Project: BrightWork Announcement (5)

- Produce User Guidance / Training Materials for each of the key roles (Team Member, Project Manager, Senior Manager)
- Migrate existing projects and data to BrightWork (optional)
- Add data and set up security
- Prepare and Deliver first Team meetings
- Make adjustments to the User Guidance and Training approach/materials
- Post production, template modifications
- Complete the design document
- Hardwire to support team (optional)
- Collect feedback and prioritize for future iteration requirements

**Assigned To:** Jonathan Browne

<table>
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<tr>
<th>Owner</th>
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<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>% Complete</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Jonathan Browne</td>
<td>10/06/2015</td>
<td>10/27/2015</td>
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</tr>
<tr>
<td></td>
<td>Jonathan Browne</td>
<td>10/07/2015</td>
<td>10/28/2015</td>
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<td>0%</td>
</tr>
<tr>
<td></td>
<td>Jonathan Browne</td>
<td>10/08/2015</td>
<td>10/29/2015</td>
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<td>4%</td>
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<tr>
<td></td>
<td>Jonathan Browne</td>
<td>11/01/2015</td>
<td>11/02/2015</td>
<td>11/02/2015</td>
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</tr>
<tr>
<td></td>
<td>Jonathan Browne</td>
<td>11/03/2015</td>
<td>11/04/2015</td>
<td>11/04/2015</td>
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</tr>
<tr>
<td></td>
<td>Jonathan Browne</td>
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<td>11/06/2015</td>
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<tr>
<td></td>
<td>Jonathan Browne</td>
<td>11/09/2015</td>
<td>11/10/2015</td>
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</tr>
<tr>
<td></td>
<td>Jonathan Browne</td>
<td>11/11/2015</td>
<td>11/12/2015</td>
<td>11/12/2015</td>
<td>0%</td>
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</tbody>
</table>

#### Project: BrightWork Announcement (5)

- Set the SharePoint infrastructure needed
- Prepare the SharePoint infrastructure
- Install and post-install the latest version of BrightWork
- Define the final and build the initial hierarchy

**Assigned To:** Peter Doyle

<table>
<thead>
<tr>
<th>Owner</th>
<th>Assigned To</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>% Complete</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Peter Doyle</td>
<td>10/01/2015</td>
<td>10/02/2015</td>
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<td></td>
<td>Peter Doyle</td>
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<td>Peter Doyle</td>
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<td>10/04/2015</td>
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<td>Peter Doyle</td>
<td>11/01/2015</td>
<td>11/02/2015</td>
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<td>2%</td>
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</table>
## Resource Allocation

### Resourcing - Resource Report

<table>
<thead>
<tr>
<th>Title</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Planned Work</th>
<th>Mar/2013</th>
<th>Apr/2013</th>
<th>May/2013</th>
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<tbody>
<tr>
<td>Assigned To: (not assigned) (120)</td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
<td>1.33</td>
<td>70.94</td>
</tr>
<tr>
<td>Assigned To: Alex Hankin (23)</td>
<td></td>
<td></td>
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<td>7.00</td>
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</tr>
<tr>
<td>Assigned To: Anne Wallace (43)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.29</td>
<td>45.03</td>
</tr>
<tr>
<td>Assigned To: Christine Chang (10)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.00</td>
<td>12.00</td>
</tr>
<tr>
<td>Assigned To: Christine Chang (1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8.00</td>
</tr>
<tr>
<td>Assigned To: Dan Bacon (9)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>53.00</td>
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</tr>
</tbody>
</table>
Assigned To E-Mail Notification
Send an e-mail when a user is assigned an item.

Notify user when they are assigned an item?

- Yes

My Work

My Open Work

User: Jonathan Weiglass

Apply Filter

Project Site: Hardware Upgrade (PSld) (13)

List Name: Project Issues (2)

List Name: Project Tasks (11)
Demo Time!
What's Next?

Free Resources
Free Advice
Free Training

BrightWork
Project Management Resources

Check out the following tools and resources to assist your project and portfolio management on SharePoint.

- Webinars
- Free Templates
- Time Management
- CPM Guide
- Risk Management
- PPM Guide
- Case Studies eBook
- PM Tips
- BrightWork Support
Thank You For Attending!

Want to take the next steps?

Try BrightWork FREE for 30 Days