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# Is Ideation Dead for PMOs or Has it Been Reinvented?

Cindy Moore  
August 9, 2018

# Agenda

**Introductions and Objectives**

**Benefits of Using SharePoint List**

**Creating the Ideation List**

**Demo**

**Q & A and Next Steps**

# Cindy Moore



## Senior PPM Specialist

Cindy has almost 20 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Cindy is an expert at understanding client needs and how to best support those needs with Project Online. Cindy holds an BS from Louisiana State University and also hold Project and SharePoint certifications.



# Why Clients Choose PPM Works

**Our Philosophy:** We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1<sup>st</sup>
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.



Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all



Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.



Sr. Project Manager Consultant, Large Legal Firm

# PPM Works Services and Solutions

Each company is unique. One-size-fits-all approaches will never help your business reach its full potential. We deliver custom PPM solutions and services, tailored to you – your industry, your culture, your one-of-a-kind challenges.

## Solutions

- Project Online Quick Start
- Industry Solutions
- PMO On-Demand
- Data Warehouse
- Report Pack
- PPM Discovery
- Office 365 Apps
- PPM Verticals
- Custom PPM Solutions

## Services

- Project Configuration
- Mentoring And Support
- Project Assessments
- Hands-on Workshops
- Virtual Upgrades
- Power BI And Dashboards
- Microsoft Planning Services
- Training Courses



# Learning Objectives

In today's webinar we will learn how to:

- Understand the benefits of using a SharePoint List for Project Ideation
- Understand how to create the list
- Understand how to promote the item to a project in Project Center

# SharePoint List vs Project Center

## SharePoint List:

- Track all project ideas
- Visibility of all pipeline projects
- Project idea can be approved at a later date
- Reduces the number of projects and project sites in PWA

## Project Center:

- Pipeline projects can be pulled in to reports
- Resource Plans/Engagements can be created to forecast resource availability
- Views can be grouped by Project Stage/State and filtered

# Setup

Steps required to create and use an Ideation List:

1. Identify fields needed for the request and make sure identical fields exist in Project Online (Enterprise Custom Fields)
2. Create a new Project Detail Page(s), if needed
3. Create a new SharePoint List
4. Navigate to the new list
5. Create a new item (request) to the list
6. Map request fields to Project Online fields
7. Promote the request to Project Center

# 1. Enterprise Custom Fields and Look up Tables

- Additional Fields needed?
- Enterprise custom fields and look up tables must be an exact match to those in PWA
- Changes to the look up table in PWA must be made in the choice value list in SharePoint
- The fields will not map properly if they do not match

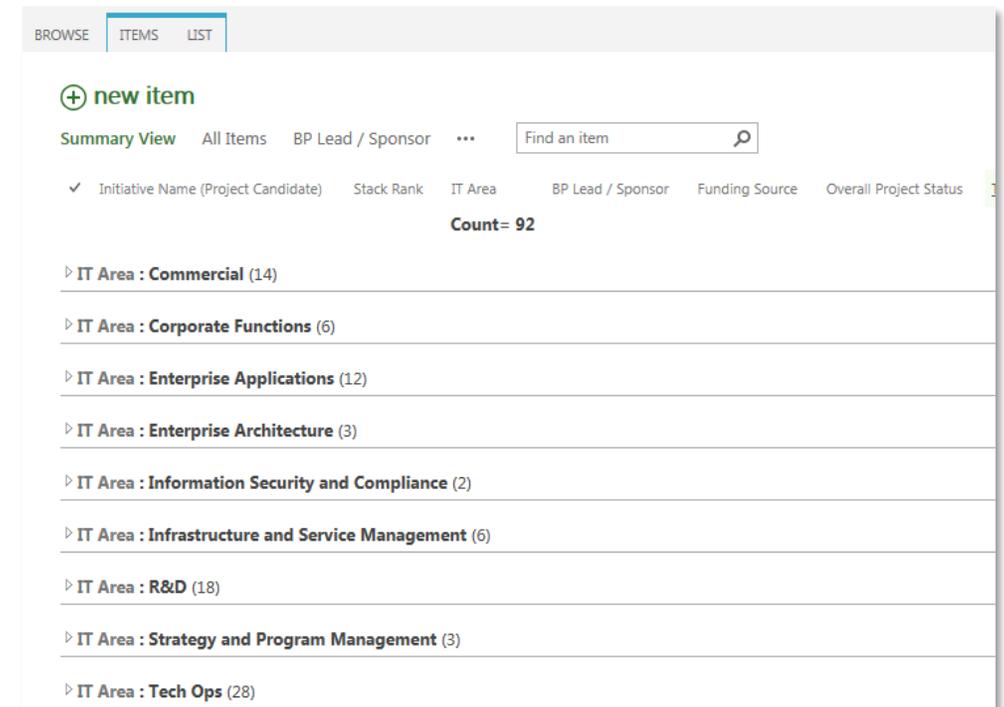
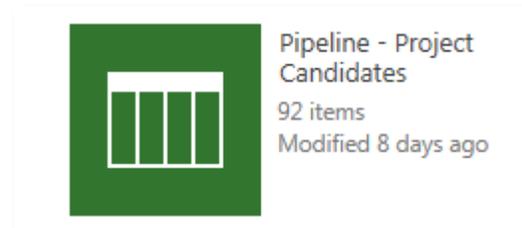
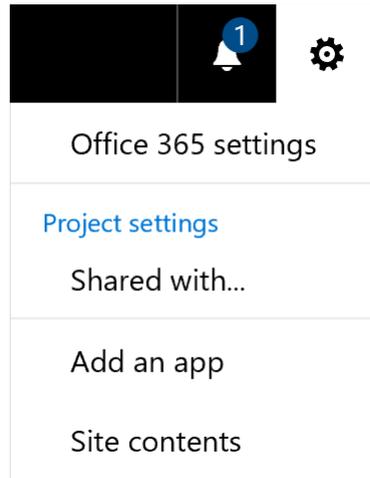
# 2. Project Detail Pages

- Will additional Project detail pages be needed?

Financial Information	(1) Project	Shire IT Financial Information page
OOTB Project Information	(2) New Project	This section captures basic project information, such as, project name and
Portfolio Information	(2) New Project	Shire IT Portfolio Information page
Project Information	(2) New Project	Shire IT Project Information page
Project Details	(2) New Project	This section captures detail information about the project
Schedule	(1) Project	This section captures Schedule information (like Milestones and Tasks)
Strategic Impact	(1) Project	This section captures how this Proposal impacts the Strategic Business Driv
Workflow Stage Status	(3) Workflow Status	Displays the current workflow stage and status

# 3. Creating the New List

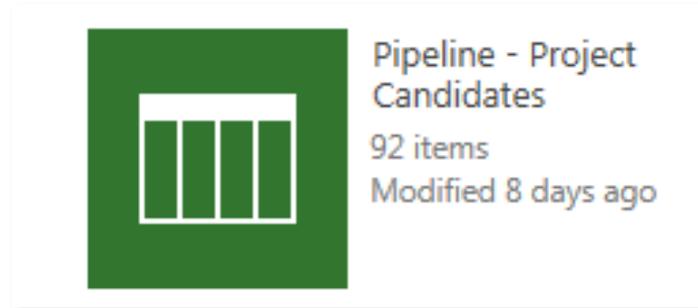
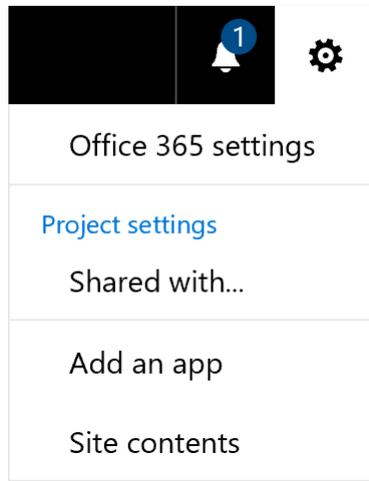
- Click on the cog wheel
- Select Site contents
- Click A



For ease of use add a link to the list to the quick launch

# 4. Navigate to the List

- Click on the cog wheel
- Select Site contents
- Find your new list and click on it



For ease of use add a link to the list to the quick launch

# 5. Adding an Item to the List

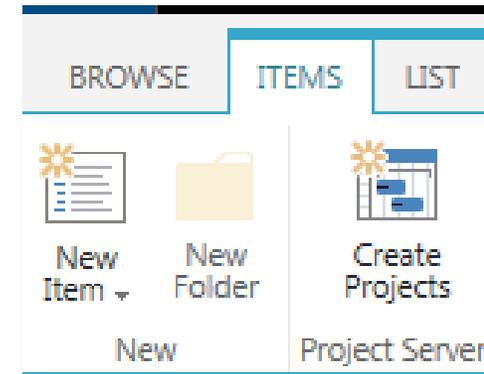
- Select new item and complete the fields



Initiative Name (Project Candidate) *	<input type="text"/>
Stack Rank	<input type="text"/>
IT Area	<input type="text"/> ▼
BP Lead / Sponsor	<input type="text"/>
Funding Source	<input type="text"/> ▼
Overall Project Status	Pipeline ▼
Target BC Submission	<input type="text"/> 
Target Start	<input type="text"/> 
Target Finish	<input type="text"/> 
Shire Project Type	<input type="text"/> ▼
Dependency Type	<input type="text"/> ▼

# 6. Mapping List Fields to Project Fields

- Highlight the row of the list item
- Select the Items tab | Create Projects
- Map the fields (only needs to be done once)



## Create Projects in Project Web App

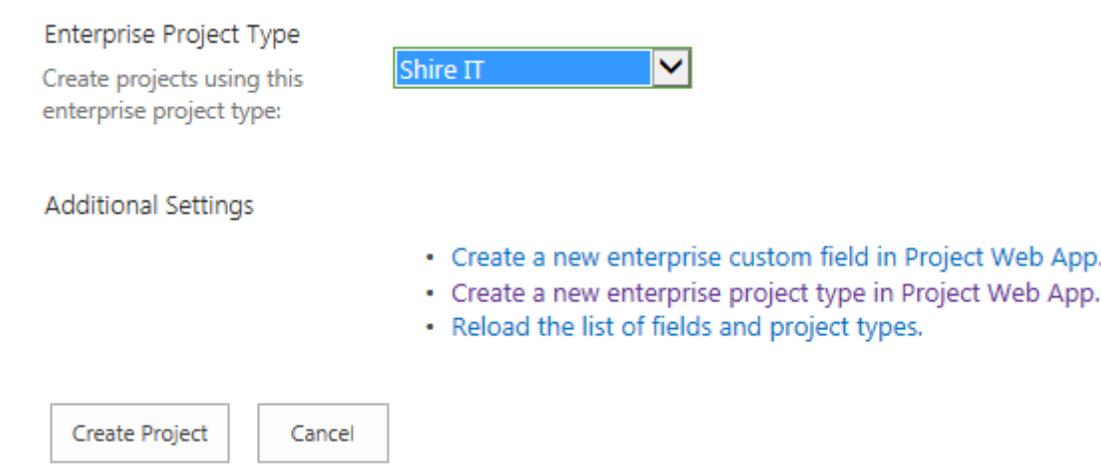
### Field Mappings

Choose how the columns in this list will map to fields in Project Web App.

Column Name	Data Type	Project Web App Fields
Initiative Name (Project Candidate)	Single line of text	Project Name
Stack Rank	Single line of text	Stack Rank
IT Area	Choice	IT Area
BP Lead / Sponsor	Single line of text	BP Lead / Sponsor
Funding Source	Choice	Funding Source
Overall Project Status	Choice	Overall Project Status

# 7. Promoting the Request to Project Center

- Select the Enterprise Project Type
- Create Project



The screenshot shows a dialog box for creating a project. It has a title bar and a close button. The main content is divided into two sections: 'Enterprise Project Type' and 'Additional Settings'. The 'Enterprise Project Type' section has a label 'Enterprise Project Type' and a sub-label 'Create projects using this enterprise project type:'. Below this is a dropdown menu with 'Shire IT' selected. The 'Additional Settings' section has a label 'Additional Settings' and a list of three instructions: 'Create a new enterprise custom field in Project Web App.', 'Create a new enterprise project type in Project Web App.', and 'Reload the list of fields and project types.'. At the bottom of the dialog are two buttons: 'Create Project' and 'Cancel'.

Enterprise Project Type  
Create projects using this enterprise project type:

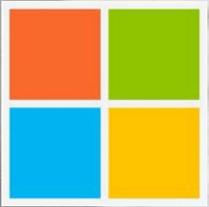
Shire IT

Additional Settings

- Create a new enterprise custom field in Project Web App.
- Create a new enterprise project type in Project Web App.
- Reload the list of fields and project types.

Create Project Cancel

The project will now be visible in Project Web App



# Microsoft PPM

Demo



# What's Next?

Now that you've selected the project ideas you want to consider, it's time to prioritize those ideas and maximize your organization's strategic value by selecting the RIGHT projects!

- Access our on-demand webinar on Portfolio Analysis here:  
<http://ppmworks.com/portfolio-management-made-easy-form>



**LinkedIn:** <https://www.linkedin.com/in/goehringcindy> and <https://www.linkedin.com/company/ppm-works-inc->

**Our Site:** [www.ppmworks.com](http://www.ppmworks.com)

**Blog:** <http://blogs.ppmworks.com>

# Calls To Action

1. Start incorporating these techniques today
2. Access our on-demand webinar on Portfolio Analysis here:  
<http://ppmworks.com/portfolio-management-made-easy-form>
3. Check out our Blogs / webcasts
4. Get LinkedIn with me (Cindy Moore)
5. Get LinkedIn with PPM Works
6. Send questions to [Info@ppmworks.com](mailto:Info@ppmworks.com)

# Contact Us

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