Using SharePoint for Project Management

Code: 2219
3 days

Course Overview

In this intensive instructor-led course, you will learn how to use SharePoint 2013 as project management information system. You'll learn about task management, using the new task features and integration with Microsoft Project, coordinating resources, communicating project updates to stakeholders, and the most efficient ways to organize your sites. No previous SharePoint expertise needed!

You will learn to implement Agile and Scrum projects in SharePoint as well as traditional waterfall and highly structured project management methodologies. In addition, you will learn about all new features such as Site Mailboxes and project reporting features. You will also learn how to automate many project functions using SharePoint workflows.

This class is packed with hands-on labs to reinforce class topics and provide you with the skills to successfully manage project artifacts, develop workflows to automate project management processes, manage content such as documents, calendars, risks, issues, and deliverables, and track tasks and resource usage. You'll learn best practices for implementing SharePoint project management sites and practical ideas for implementing the solutions within your organization.

Make better decisions, communicate more effectively, and increase project success with SharePoint 2013 and this training course!

Top 10 Reasons to Take This Course

1. Provide stakeholders with a single point of access to information.
2. Lower costs and improve operational efficiency.
3. Jump-start your efforts to create a Project Management Information System (PMIS).
4. Leave the course with everything you need to plan, build, and implement project management sites in SharePoint.
5. Learn by doing and building actual solutions during class.
6. Enable social decision-making through real-time collaboration features of SharePoint.
7. Increase project success.
8. Manage both Agile and Waterfall projects using SharePoint.
9. Learn from project management and SharePoint experts.
10. Experience real-world scenarios and examples of how to use SharePoint in your organization.

Who Needs To Attend

This SharePoint project management training course is vital for anyone working in a project
environment and utilizing Microsoft SharePoint 2013, including:

- Project managers
- Project directors/PMO directors
- Business analysts
- Team leads
- Data analysts
- Product managers
- Marketing managers and specialists
- IT managers
- Operations managers

**Course Details**

**Topics Include**

- SharePoint 2013’s full feature set of collaboration features
- Build and use SharePoint 2013 project sites and features:
  - Project Summary Web Part
  - Visual timeline of the project's tasks
  - Complete task schedule for a project
  - Library for storing relevant project documents
  - Notebook for quickly capturing and organizing information about the project
  - Shared calendar for team events
  - Ability to connect to the Project 2013 client application
- Build and use dashboards and business intelligence reports to give management visibility into projects
- Construct a PMIS using SharePoint to schedule project planning, reporting, and forecasting
- Allow project stakeholders instant access to critical project documents and information
- Facilitate project team meetings and communication flow with Team Sites
- Use SharePoint’s built-in workflow capability to create custom workflows for your projects
- Develop standard project management processes using SharePoint’s BPM capabilities
- Create custom lists, calendars, contacts, and project tracking for each project
- Establish project tracking guidelines through SharePoint for all projects

**Course Outline**

1. **Introduction to SharePoint**

   - What is SharePoint?
     - What's New in SharePoint 2013
     - Hardware Requirements
     - Software Requirements
     - Licensing Options
     - Hosting Options: On-Premise vs. Office 365
   - What is a Project Management Information System?
     - Why SharePoint?
2. Organizing Your Project Sites

- SharePoint Hierarchy
- Creating Site Collections, Sites, and Sub-Sites
- Managing Security in SharePoint
  - Creating Groups
  - Managing Site/Project Members
  - Setting Up the 'Access Request' Feature
  - Customizing Permissions
- Information Architecture in SharePoint

3. Managing Project Data with SharePoint Lists

- Out-of-Box List Templates
  - Tasks Lists and Timelines
  - Project Calendars
  - Links and Promoted Links
  - Project Announcements
  - Discussion Boards
  - Issue Tracking
  - Surveys
- Creating Custom Lists
  - Column Options
  - List Options: Versioning, Content Approval, Ratings
  - Creating Views
  - Importing Data
  - Tracking Project Milestones, Deliverables, and Risks with Custom Lists

4. Managing Documents with SharePoint Libraries

- Out-of-Box Libraries
  - Document Library
  - Form Library
  - Wiki Pages
  - Pictures
  - Report Library
  - Asset Library (Videos, Audio, Images)
- Organizing Project Documents with Metadata
- Using Document Sets
- Collaborating on Project Documents
  - Check-In / Check-Out
  - Versioning
  - Content Approval
  - Uploading Files
  - Working with Versioning
  - Working with Documents in Office
  - Synchronizing files for Offline Use

5. SharePoint Communities and Social Features

- My Sites and SharePoint Profiles
- Newsfeeds
6. SharePoint 2013 and Microsoft Office Integration

- Integrating with Microsoft Project
  - Publishing Project Plans to SharePoint
  - Managing Task Updates in SharePoint and Project
- Integrating with Microsoft Excel
- Integrating with Microsoft Outlook
  - Integrating Task Data with Outlook
  - Using the new integrated Tasks view in MySites
  - Integrating Project Calendars with Outlook
  - Integrating Discussion Boards with Outlook
  - Integrating Contact Lists with Outlook
- Using Site Mailboxes

7. Designing a Project Site

- Working with Pages
- Working with Web Parts
- Reusable Project Templates with Site Templates

8. Project Dashboards and Reports with Excel and Visio Services

- Excel Services
- Visio Services

9. Automating Approval and Other Processes with Workflows

- Configuring Out-of-Box Workflows
- Building Custom Workflows

10. Agile/Scrum Projects in SharePoint

- Agile/Scrum Concepts
  - Product Backlogs
  - Sprints
  - Task Boards
  - Daily Stand-Up Meetings
  - Burn Charts and Reports