USING SHAREPOINT FOR PROJECT MANAGEMENT

Course Code: 2219

Learn how to use new, powerful features of SharePoint to manage your projects, documents, meetings, communications, and scheduling.

SharePoint makes project management easy for any user who needs to collaboratively manage a project or participate in a project team. Recent versions of SharePoint empower users both novice and experienced, with everything from handling the lightest projects using the new project site template & features, to the more sophisticated approach managing enterprise portfolio projects integrating SharePoint with Project Server 2013. Now, any Project Manager has an easy way to coordinate resources, track tasks, manage team members and communicate with stakeholders about projects in real time across their organization in an effective, efficient way.

This SharePoint project management class is designed for SharePoint 2013, SharePoint 2016 and SharePoint 365 users. Labs are conducted in SharePoint 2016.

What You’ll Learn

• How to use SharePoint’s full feature set of collaboration features
• Build and Use SharePoint Project sites & features
• Allow project stakeholders instant access to critical project documents and information
• Build and Use Dashboards and Business Intelligence reports to give management visibility into projects
• Construct a PMIS using SharePoint to schedule planning, reporting and forecasting your project
• 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

Who Needs to Attend

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

- Project managers
- Project directors/PMO directors
- Business analysts
- Team leads
- Data analysts
- Product managers
- Marketing managers and specialists
- IT managers
- Operations managers
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| CLASSROOM LIVE | $1,995 USD | 3 days |

Classroom Live Outline

**Part 1: Introduction to SharePoint**

1. What is SharePoint?
   - What’s New in SharePoint
   - Hardware Requirements
   - Software Requirements
   - Licensing Options
   - Hosting Options – On-Premise versus Office 365

2. What is a Project Management Information System?
   - Why SharePoint?

**Part 2: Organizing your Project Sites**

1. Understanding the SharePoint Hierarchy
2. Creating Site Collections, Sites, and Sub-Sites
3. Managing Security in SharePoint
   - Creating Groups
   - Managing Site/Project Members
   - Setting up the "Access Request” Feature
   - Customizing Permissions
4. Information Architecture in SharePoint

**LAB: Creating PMO Site and Project Site**

**Part 3: Managing Project Data with SharePoint Lists**

1. Out-of-Box List Templates
   - Tasks Lists & Timelines
   - Project Calendars
   - Links & Promoted Links
   - Project Announcements
   - Discussion Boards
• Issue Tracking
• Surveys

2. Creating Custom Lists
   • Column Options
   • List Options – Versioning, Content Approval, Ratings
   • Creating Views
   • Importing Data
   • Tracking Project Milestones, Deliverables, and Risks with Custom Lists

LAB: Working with Task Lists
LAB: Working with Calendars, Issues, and Surveys
LAB: Creating a Risk List and Deliverables List

Part 4: Managing Documents with SharePoint Libraries
   1. Out-of-Box Libraries
      • Document Library
      • Form Library
      • Wiki Pages
      • Pictures
      • Report Library
      • Asset Library (Videos, Audio, Images)
   2. Organizing Project Documents with Metadata
   3. Using Document Sets
   4. Collaborating on Project Documents
      • Check-in / Check-out
      • Versioning
      • Content Approval

LAB: Creating a Project Documents Library with Metadata
   • Uploading Files
   • Working with Versioning
   • Working with Documents in Office
   • Synchronizing files for Offline Use

LAB: Manage Project Requests using Document Sets

Part 5: SharePoint Communities and Social Features
   1. My Sites and SharePoint Profiles
   2. Newsfeeds
      • Following People, Documents, and Projects
   3. Community Sites
      • Posting and Replies
      • Membership
      • Reputations, Badges, and Social Features

LAB: Setting up your Profile and Newsfeed
LAB: Creating and Managing a Community Site

Part 6: SharePoint and Microsoft Office Integration
1. Integrating with Microsoft Project
   • Publishing Project Plans to SharePoint
   • Managing Task Updates in SharePoint & Project
2. Integrating with Microsoft Excel
3. 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

LAB: Create and Manage Project Plans with SharePoint & Microsoft Project
LAB: Integrating Project Data with Microsoft Outlook
LAB: Using Site Mailboxes

Part 7: Designing a Project Site
   1. Working with Pages
   2. Working with Web Parts
   3. Reusable Project Templates with Site Templates

LAB: Design and Create a Full-Featured Project Site for your Team

Part 8: Project Dashboards and Reports with Excel & Visio Services
   1. Excel Services
   2. Visio Services

LAB: Display Project Progress Charts with Excel Services
LAB: Interactive Project Process Document with Visio Services

Part 9: Automating Approval and Other Processes with Workflows
   1. Configuring Out of Box Workflows
   2. Building Custom Workflows

LAB: Configure a Document Approval Workflow
LAB: Create a Custom "Change Control" Workflow for your Project

Part 10: Agile / SCRUM Projects in SharePoint
   1. Agile / SCRUM Concepts
      • Product Backlogs
      • Sprints
      • Task Boards
      • Daily Stand-up Meetings
      • Burn charts and Reports

LAB: Create a Product Backlog, a Task Board, and Sprints
LAB: Manage SCRUM Team Work in SharePoint

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• Team Leads
• Data Analysts
• Product Managers
• Marketing Managers and Specialists
• IT Managers

Operations Managers

Classroom Live Labs
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Lab 18: Manage Scrum Team Work in SharePoint

Jun 29 - Jul 1, 2020 | 8:30 AM - 4:30 PM | SEATTLE, WA
Jul 27 - 29, 2020 | 8:30 AM - 4:30 PM | SAN ANTONIO, TX
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PRIVATE GROUP TRAINING

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