

Managing Project with Sharepoint

Part 1: Starting Out

1. About class
 1. Prerequisites
 2. Logistics
 3. Agenda
 4. Lab overview – Approach to lab exercises
 5. Introductions
2. Microsoft project management “Big Picture”
 1. Roadmap/solutions for project management in Office 365
3. Requirements of a PMIS (Project Management Information System)
 1. What is a PMIS?
 2. Setting expectations
 3. Attributes of a good PMIS
 4. Planning your approach: Choosing the appropriate solution

Part 2: Office 365 Groups and Microsoft Teams

1. Microsoft Teams architecture
2. Overview of modules
3. Chat
4. Teams and Channels
5. Calendar
6. OneNote: Utilizing for meeting minutes
7. Planner
8. Files
9. Customizing Teams
 1. Lab 1 – Utilizing Microsoft Teams for Project Management

Part 3: SharePoint Online

1. SharePoint as a PMIS – Demo
2. SharePoint Online architecture
 1. Sites

2. Apps
3. Pages
4. Hub architecture
3. Creating project sites
 1. Site templates in SharePoint Online
 2. Sharing with project team and stakeholders
 3. Lab 2 – Creating a SharePoint team site for project management
4. Advanced permissions and sharing in SharePoint Online
 1. Permissions architecture
 2. People and groups
 3. Permission levels
 4. Inheritance
 5. Lab 3 – Customizing permissions: groups, permission levels
5. Working with Apps: Lists
 1. Lists to manage non-document content and implement business processes
 2. Creating Lists
 3. Logical data structure using metadata: Creating and customizing columns
 4. Views
 5. Advanced List management
 1. Content Types
 2. Site Columns
 3. List Settings
 6. Building Lists for successful project management
 1. Tasks
 2. Risks
 3. Issues
 4. Agile
 5. Timesheets
 7. List integration with Office 365 Apps
 1. Lab 4 – Managing project data with lists
 8. Working with Apps: Libraries

1. Libraries to manage document lifecycle and implement business processes
2. Creating libraries
3. Classification and categorizing of documents using metadata: Creating and customizing columns
4. Views
5. Content types/templates
6. Advanced library management
 1. Content type/templates
 2. Site columns
 3. Library settings
7. Syncing with OneDrive
9. Building Libraries to successfully manage project documentation lifecycle
 1. Project plan docs
 2. Expense reports
 3. Procedures
 4. Budget docs
 5. Invoices
 6. Lab 5 – Managing project document life cycle with Libraries
10. Customizing SharePoint pages and using Web Parts
 1. Page types
 2. Creating pages
 3. Web Parts
 4. Editing and publishing pages
 5. Lab 6 – Customizing pages to drive team member adoption of project sites
11. SharePoint Online for Project Management – Review and questions (discuss advanced topics: site collection administration, roles, governance, etc.)

Part 4: Project Online

1. Introduction to Project Online for Project Portfolio Management
2. Architecture of Project Online / PWA
3. Modules
4. Pages
5. Customization

6. Integration with SharePoint Project Sites
7. Integration with Microsoft Project Professional
 1. Lab 7 – Creating and managing projects using Project Online
8. Power BI for reporting portfolio status
9. Wrap up
10. Questions
11. Survey
12. Next steps: in-depth learning, consulting