Using SharePoint 2013 for Project Management
Course SP32; 3 Days, Instructor-led

Course Description
This intense 3-day instructor-led course will teach how to use SharePoint 2013 as a project management information system. You'll learn everything from task management using the new task features and integration with Microsoft Project, to coordinating resources, communicating project updates to stakeholders, and the most efficient ways to organize your sites. No previous SharePoint expertise needed!

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

Course Objectives
- Understand how to use SharePoint 2013's full feature set of collaboration features
- Build and Use SharePoint 2013 Project sites & 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 planning, reporting and forecasting your project
- 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

Audience
This SharePoint project management training course is vital for anyone working in a project environment and using 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 Outline

Introduction to SharePoint
• What is SharePoint?
  • What's New in SharePoint 2013
  • Hardware Requirements
  • Software Requirements
  • Licensing Options
  • Hosting Options – On-Premise versus Office 365
• What is a Project Management Information System?
  • Why SharePoint?

Organizing your Project Sites
• Understanding the 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
• LAB: Creating PMO Site and Project Site

Managing Project Data with SharePoint Lists
• Out-of-Box List Templates
  • Tasks Lists & Timelines
  • Project Calendars
  • Links & 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

LAB: Working with Task Lists

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

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

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

SharePoint Communities and Social Features
- My Sites and SharePoint Profiles
- Newsfeeds
  - Following People, Documents, and Projects
- 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

SharePoint 2013 and Microsoft Office Integration
- Integrating with Microsoft Project
  - Publishing Project Plans to SharePoint
  - Managing Task Updates in SharePoint & 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

LAB: Create and Manage Project Plans with SharePoint & Microsoft Project

LAB: Integrating Project Data with Microsoft Outlook

LAB: Using Site Mailboxes

Designing a Project Site
• Working with Pages
• Working with Web Parts
• Reusable Project Templates with Site Templates

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

Project Dashboards and Reports with Excel & Visio Services
• Excel Services
• Visio Services

LAB: Display Project Progress Charts with Excel Services

LAB: Interactive Project Process Document with Visio Services

Automating Approval and Other Processes with Workflows
• Configuring Out of Box Workflows
• Building Custom Workflows

LAB: Configure a Document Approval Workflow

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

Agile / SCRUM Projects in SharePoint
• 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