

# Using SharePoint for Project Management 2013

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## Course Details

### 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
- Following People, Documents, and Projects
- Community Sites
- Posting and Replies
- Membership
- Reputations, Badges, and Social Features

## **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

## 11. Labs

- Creating PMO Site and Project Site
- Working with Task Lists
- Working with Calendars, Issues, and Surveys
- Creating a Risk List and Deliverables List
- Creating a Project Documents Library with Metadata
- Manage Project Requests Using Document Sets
- Setting Up Your Profile and Newsfeed
- Creating and Managing a Community Site
- Create and Manage Project Plans with SharePoint and Microsoft Project
- Integrating Project Data with Microsoft Outlook
- Using Site Mailboxes
- Design and Create a Full-Featured Project Site for Your Team
- Display Project Progress Charts with Excel Services
- Interactive Project Process Document with Visio Services
- Configure a Document Approval Workflow
- Create a Custom Change Control Workflow for Your Project
- Create a Product Backlog, a Task Board, and Sprints
- Manage Scrum Team Work in SharePoint