# Managing Projects with Microsoft 365 Training

Duration: **3 Day**

BILGINC IT Academy
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## Overview

**Learn how to use Microsoft Teams, SharePoint Online, and Project Online to improve project efficiency and accuracy.**

The world of project management technology solutions is an ever-changing landscape. With Software-As-A-Service (SaaS) applications and cloud computing enabling remote work and collaboration across technologies, it is a challenge to choose the right solutions that meet project management needs. Microsoft's portfolio of project management tools empower project managers and their teams to ideate, analyze, manage, and close projects. The tools managers choose depends on the complexity of the project, methodology used, and level of resources managed.

This course provides students with an understanding of all the Microsoft tools to manage teams and projects. It focuses on how Microsoft Teams, Planner, SharePoint Online, Project Professional, and Project Online (Project Server) work together. Students gain a full understanding of which tools are used for what type of situation and return to work prepared to use them on their own projects.

Students also learn how to build a PMIS from scratch using SharePoint Online, and how that integrates with Microsoft Project Professional. From there students expand their knowledge to understand how to use Project Online (Project Server) to manage a portfolio of projects that share resources and schedules across the enterprise.

This course utilizes Microsoft 365 Online, but the skills learned are easily transferred and implemented to on-premise solutions like SharePoint Server 2019 and Project Server.

### Who Should Attend?

This course is designed for anyone who wants a broad understanding of all the tools available for project management in Microsoft 365. Students should come to the class with a good knowledge of project methodology and basic knowledge of SharePoint Online so the focus can remain on in-depth, hands-on training. People manage projects; tools can make the process easier.

Professionals who benefit from this course include:

- Project Managers
- Portfolio Managers
- Project Directors/PMO Directors
- Business Analysts
- Team Leads
- Data Analysts
- Product Managers
- Marketing Managers and Specialists
- IT Managers
- Operations Managers
- Team Members

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## What You Will Learn

- Use Microsoft 365 tools for Project Management and decide when to use them
- Uncover the depth of using Microsoft Teams for more than chats and basic communication
- Enhance your project management tool skills to create a PMIS for your organization
- Create simple projects in Planner
- Integrate Planner, Teams, Office, SharePoint, Project Pro and Project Online
- Use Microsoft 365 tools for Project Management and decide when to use them
- Uncover the depth of using Microsoft Teams for more than chats and basic communication
- Enhance your project management tool skills to create a PMIS for your organization
- Create simple projects in Planner
- Integrate Planner, Teams, Office, SharePoint, Project Pro and Project Online
- Build and use SharePoint Project Site features
- Construct a PMIS using SharePoint to schedule planning, reporting, and forecasting
- Implement SharePoint List Apps to manage project information: schedules, tasks, risks, issues
- Implement SharePoint Library Apps to manage critical document lifecycle: budgets, plans, policies, views, version control, metadata
- Share project information with stakeholders and grant transparent access to critical project documents and information
- Create projects in Microsoft Project Professional and assign resources to tasks
- Manage multiple projects using Project Online (Project Server) and share resource pools at the enterprise level.

## Outline

**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

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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

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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