

## Practical PMIS in Microsoft 365

### *Summary*

*This two-day course focuses on utilizing the rich Microsoft 365 eco-system as an easy to use and efficient Project Management Information System (PMIS) that covers all facets of PMI's requirements for successful management of project based work. It is directed to those who are responsible for managing projects or find themselves as members of a project team. This is an entry level course for active project participants and has no pre-requisites.*

***Length: Two Days***

### ***Course Description:***

Practical PMIS in Microsoft 365 is a two-day introductory course that demonstrates how to successfully utilize the features within the Microsoft 365 Cloud offering as a project management platform. You will maximize your time in this course by participating in hands-on exercises configuring the components that make up a functional PMIS. This course will give you further immediate returns on your learning investment by providing you with a complete approach to project management that can be immediately put into action. You will apply PMIS concepts within Microsoft 365 that map to the standard areas of project management from initiation through closing.

In short, the Practical PMIS in Microsoft 365 course is designed for project teams who want to maximize their time and increase their return on investment with tools they already have or are easily available.

### ***Purpose:***

The Practical PMIS in Microsoft 365 course will provide participants with an understanding of using project management tools and templates within the Microsoft 365 eco-system. During the course participants will gain knowledge on the following topics:

- Overview of Microsoft 365 and its many PM related offerings
  - Teams
  - Planner
  - To Do
  - SharePoint
  - Project for the web (Plan 1)

- Understanding SharePoint Online and its role in the PMIS
  - Lists
  - Libraries
  - Apps
  - Meta-data and how to use it effectively
  - SharePoint based PM tools
  - User permissions and focusing activity through them
  - Project dashboards and reports
- Using Teams and Planner
- Individual productivity with To Do and Outlook
- Integrating with Project for the web
- Automation with Power Automate
- Connecting to services/apps outside of Microsoft 365

### *Learning Outcomes:*

At the end of the course, participants will be able to:

- Understand the PM related components that make up the Microsoft 365 eco-system
- Configure Lists, Libraries, Apps and meta-data specific to the project needs
- Set up Project for the web and integrate with Teams, Planner, and To Do
- Create project dashboards and reports
- When, where, and how to integrate other Microsoft 365 components
- Integrate with applications outside of Microsoft 365 with Flow
- Avoid common mistakes and misconceptions when using Microsoft 365

### *Management Competencies addressed:*

Participants will enhance their competencies in project, communication, risk, human resource, time, scope, quality, cost and change management.

### *Instructional Approach:*

This course is made up of short lectures, multiple exercises, and case vignettes. You will undertake both individual exercises and team assignments. You are guaranteed not to be bored.