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Tips and Tricks: Project Detail Pages

Presented by: Jenny Ward

October 4, 2018

Agenda

- Project Detail Page Overview
- Page Properties
- Creating and Editing the PDP
- PDPs and Workflows
- Q & A

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Jenny Ward

Senior PPM Specialist

With a well-rounded, 20-year career in IT and a focus on service delivery, Jenny has grown adept at prioritizing the challenges her clients face and responding effectively. Most recently, she spent 7 years as SharePoint and Project Server Administrator for a global data and telephony company, a role in which she acted as both technical and operational director of a Project Management support team. Not only is Jenny comfortable with installation, maintenance, reporting, and end-user training, but also front-end site design and execution.

Project SharePoint Office 365 Power BI

Why Clients Choose PPM Works

Our Philosophy: We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1st
- Proven Methodology and Templates
- Competitive Pricing

Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.

Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all

Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.

Sr. Project Manager Consultant, Large Legal Firm

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PPM Works Services and Solutions

Each company is unique. One-size-fits-all approaches will never help your business reach its full potential. We deliver custom PPM solutions and services, tailored to you – your industry, your culture, your one-of-a-kind challenges.

Solutions

- Project Online Quick Start
- Industry Solutions
- PMO On-Demand
- Data Warehouse
- Report Pack
- PPM Discovery
- Office 365 Apps
- PPM Verticals
- Custom PPM Solutions

Services

- Project Configuration
- Mentoring And Support
- Project Assessments
- Hands-on Workshops
- Virtual Upgrades
- Power BI And Dashboards
- Microsoft Planning Services
- Training Courses

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Learning Objectives

At the end if this webinar, participants will understand the role of the Project Detail Page in Project Online and how to use it to best serve the needs of your organization.

Participants will be able to:

1. Understand the Structure and Purpose of the Project Detail Page
2. Create the PDP
3. Edit the PDP layout and Properties
4. Learn to Control Visibility of the PDP with a Workflow

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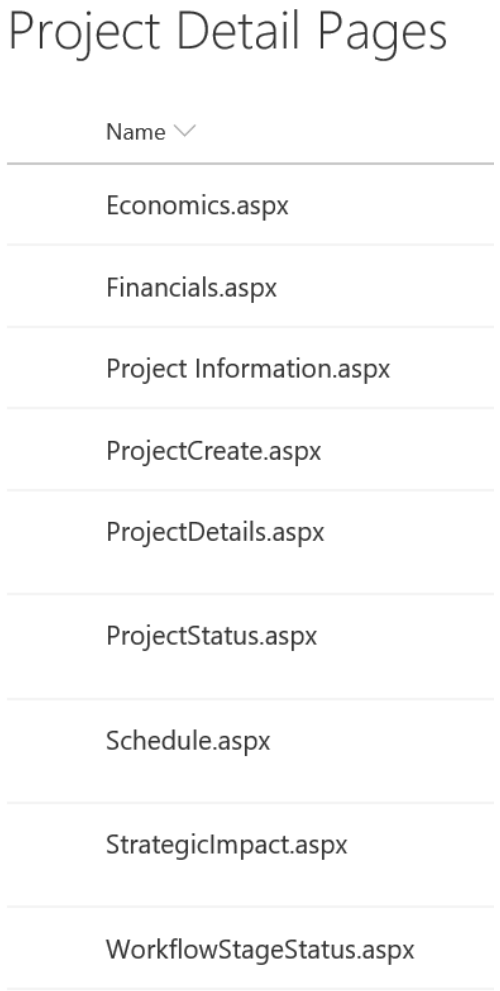
Quick Question for Group

How do you currently use Project Detail Pages?

1) Are you using one to create new projects?
2) Are there specific project details or information you need to see on a PDP?
3) Would you like to see Libraries or Lists in your PDPs?
4) Do you use a workflow to control which pages show at which stage?



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Project Detail Page Demo

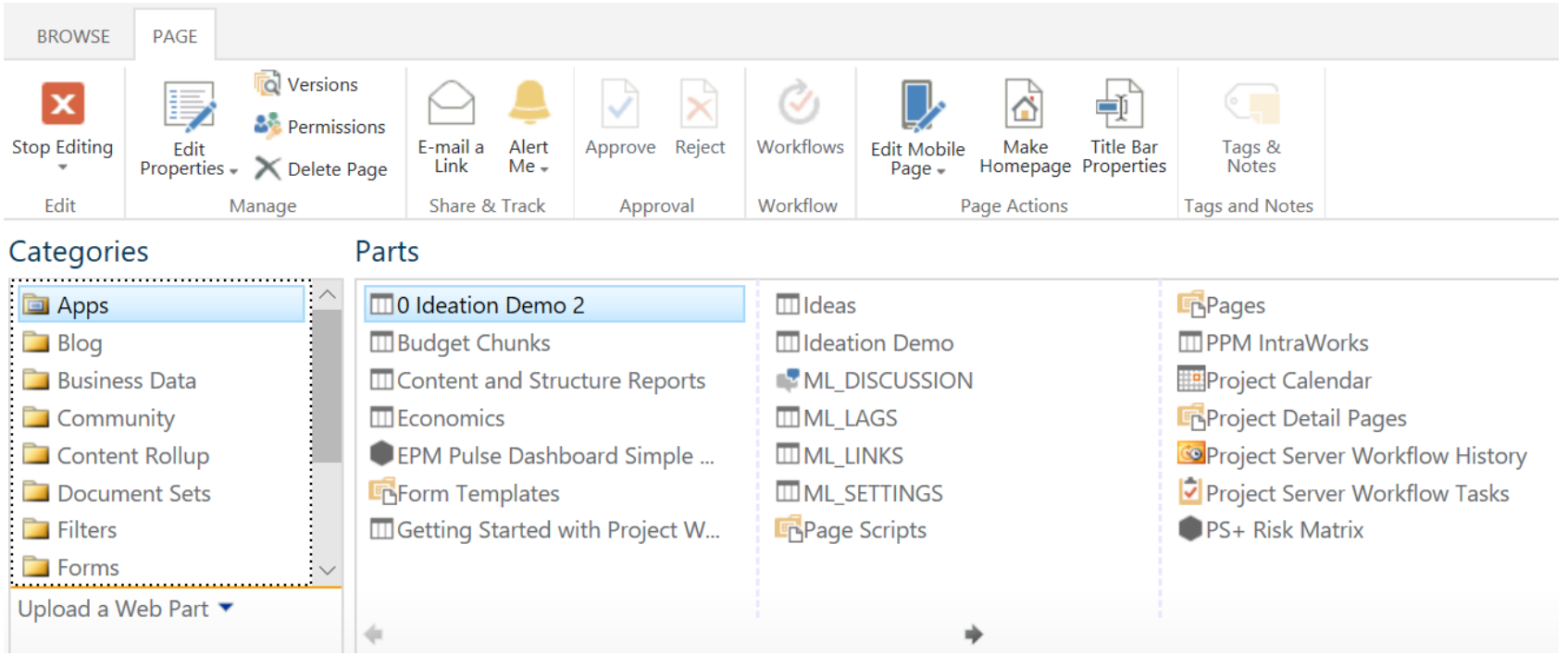
- **Project Detail Page Overview**
- Page Properties
- Creating and Editing the PDP
- PDPs and Workflows

Project Online Demo

Project

Overview

- PDPs can be customized to your heart's content.
- There are many web parts that can be inserted into PDPs, just like any SharePoint page
- Jquery and Javascript can also be used to modify the look of your pages
- You decide which Project Online fields appear on the page



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Project Detail Page Demo

- Project Detail Page Overview
- **Page Properties**
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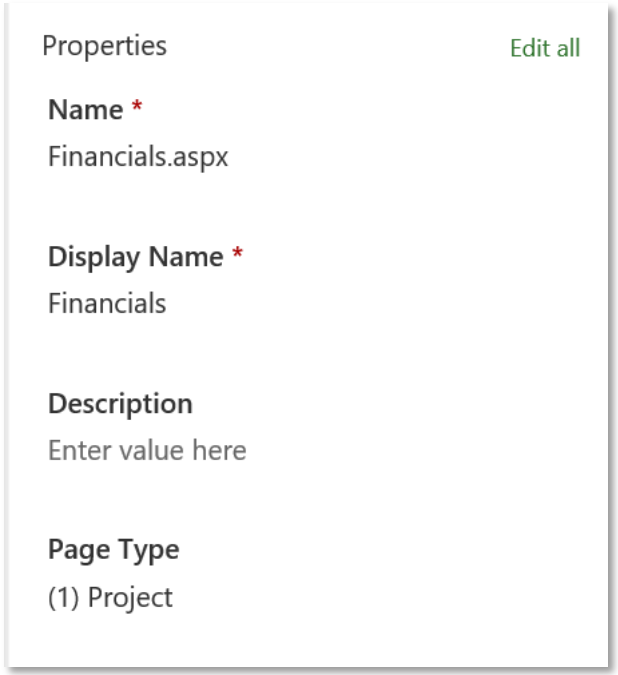
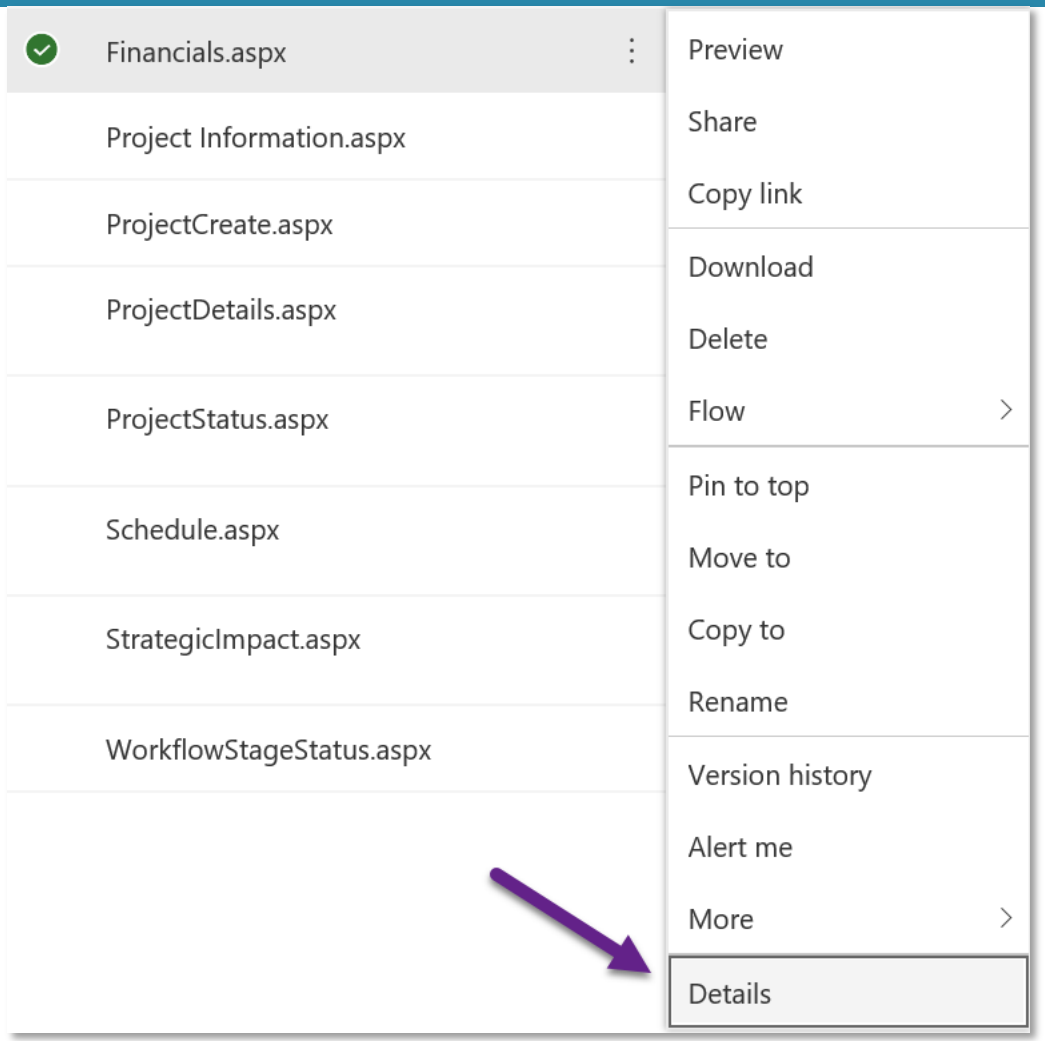
Project Online Demo

Project

Page Properties

SharePoint makes it easy to copy entire PDPs and edit the Project Detail Page Properties.





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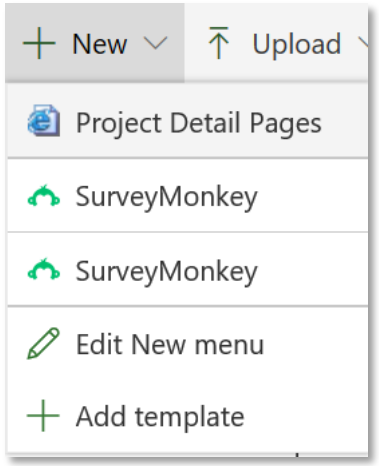
Project Detail Page Demo

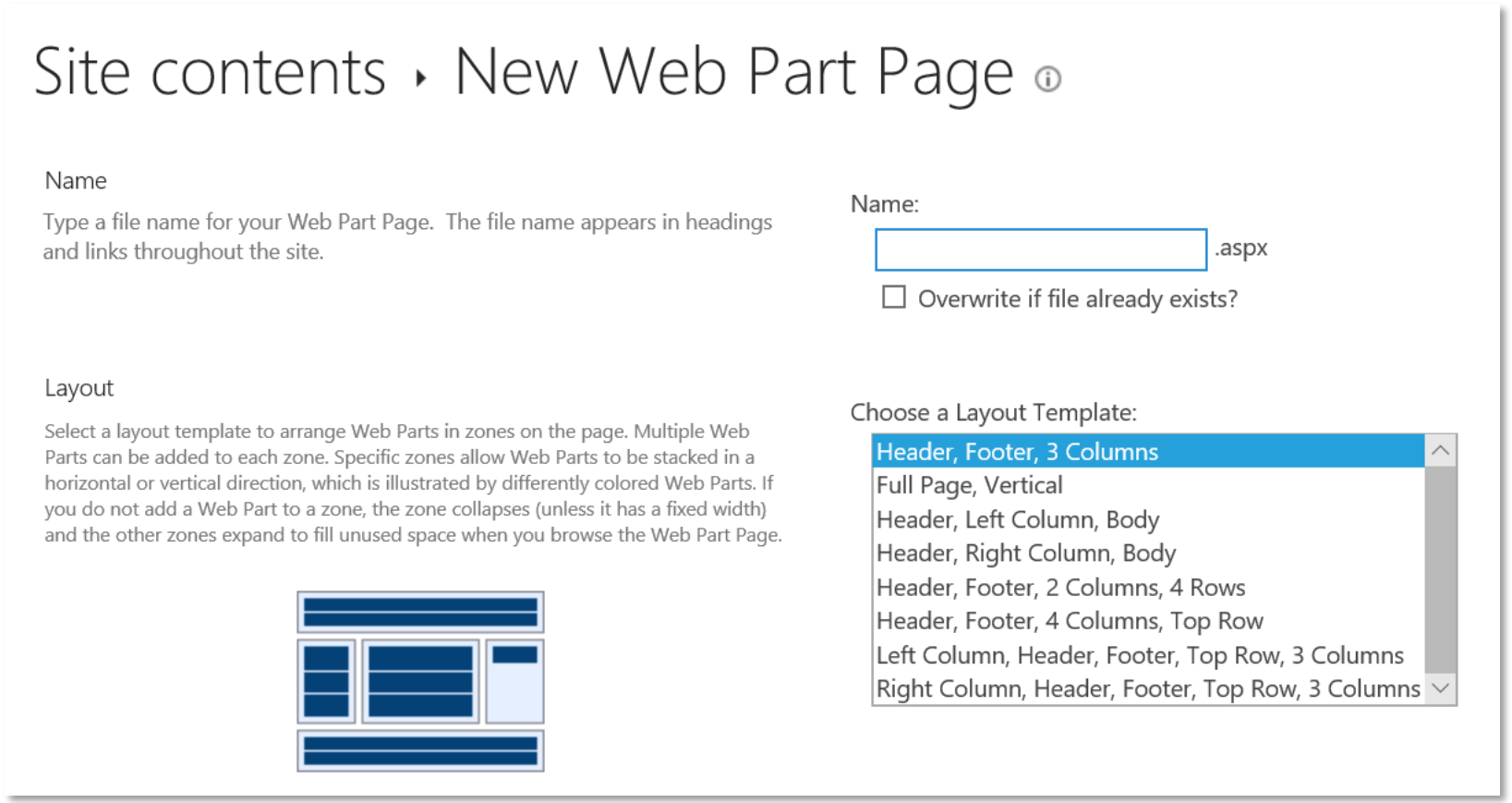
- Project Detail Page Overview
- Page Properties
- **Creating and Editing the PDP**
- PDPs and Workflows

Project Online Demo

Project

Create and Edit the PDP





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Project Detail Page Demo

- Project Detail Page Overview
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- Creating and Editing the PDP
- **PDPs and Workflows**

Project Online Demo

Project

PDPs and Workflows

Workflow Stages

NEW WORKFLOW STAGE | DELETE WORKFLOW STAGES

Workflow Stage	Description	Visible Project Detail Pages
Workflow Phase Name: 1 Initiation		
1.1 Concept		Project Details, Schedule, Project Status, Strategic Impact, Financials
1.2 Business Case		Project Details, Schedule, Project Status, Strategic Impact, Financials
1.3 Selection		Project Details, Schedule, Project Status, Strategic Impact, Financials
Project Start		Project Details, Schedule, Financials
Workflow Phase Name: 2 Concepting		
2.1 Concept		Project Details, Schedule, Project Status, Strategic Impact, Financials
2.2 Ready for Concept Review		Project Details, Schedule, Project Status, Strategic Impact, Financials
PD Review		Project Details, Schedule, Financials
Workflow Phase Name: 2 Planning		
2.1 Initial Plan		Project Details, Schedule, Project Status, Strategic Impact, Financials
2.2 Final Plan		Project Details, Schedule, Project Status, Strategic Impact, Financials
Workflow Phase Name: 3 Execution		
3.1 Execution		Project Details, Schedule, Project Status, Strategic Impact, Financials

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Question and Answer

Send questions to Info@ppmworks.com

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Our Site: www.ppmworks.com
Blog: https://ppmworks.com/blog/

Calls To Action

1. Start incorporating these techniques today
2. Check out our Blogs / webcasts
   - Editing Project Detail Pages
   - Project Level Field Missing from Project Detail Pages
3. Get LinkedIn with me
4. Get LinkedIn with PPM Works
5. Send questions to Info@ppmworks.com

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Contact Us

We'd Love to Hear From You- Get In Touch With Us!

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