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Tips and Tricks: Project Detail Pages

Presented by: Jenny Ward

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Agenda

Project Detail Page Overview

Page Properties

Creating and Editing the PDP

PDPs and Workflows

Q & A

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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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



Learning Objectives

At the end of 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

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?

Project Detail Pages

Name ▾

Economics.aspx

Financials.aspx

Project Information.aspx

ProjectCreate.aspx

ProjectDetails.aspx

ProjectStatus.aspx

Schedule.aspx

StrategicImpact.aspx

WorkflowStageStatus.aspx



Project Detail Page Demo

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

Project Online Demo

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

The screenshot displays the Project Online page editor interface. At the top, there is a ribbon with two tabs: 'BROWSE' and 'PAGE'. The 'PAGE' tab is active, showing a series of icons for various actions. Below the ribbon, the interface is divided into two main sections: 'Categories' and 'Parts'.

Categories: A list of folders including Apps, Blog, Business Data, Community, Content Rollup, Document Sets, Filters, and Forms. An 'Upload a Web Part' button is located at the bottom of this list.

Parts: A gallery of web parts organized into three columns. The first column includes '0 Ideation Demo 2', 'Budget Chunks', 'Content and Structure Reports', 'Economics', 'EPM Pulse Dashboard Simple ...', 'Form Templates', and 'Getting Started with Project W...'. The second column includes 'Ideas', 'Ideation Demo', 'ML_DISCUSSION', 'ML_LAGS', 'ML_LINKS', 'ML_SETTINGS', and 'Page Scripts'. The third column includes 'Pages', 'PPM IntraWorks', 'Project Calendar', 'Project Detail Pages', 'Project Server Workflow History', 'Project Server Workflow Tasks', and 'PS+ Risk Matrix'.



Project Detail Page Demo

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Project Online Demo

Page Properties

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

Properties	Edit all
Name *	Financials.aspx
Display Name *	Financials
Description	Enter value here
Page Type	(1) Project

✓ Financials.aspx	⋮	Preview
Project Information.aspx		Share
ProjectCreate.aspx		Copy link
ProjectDetails.aspx		Download
ProjectStatus.aspx		Delete
Schedule.aspx		Flow >
StrategicImpact.aspx		Pin to top
WorkflowStageStatus.aspx		Move to
		Copy to
		Rename
		Version history
		Alert me
		More >
		Details





Project Detail Page Demo

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

Project Online Demo

Create and Edit the PDP

- + New
- ↑ Upload
- Project Detail Pages
- SurveyMonkey
- SurveyMonkey
- Edit New menu
- + Add template

Site contents ▸ New Web Part Page ⓘ

Name

Type a file name for your Web Part Page. The file name appears in headings and links throughout the site.

Name:

.aspx

Overwrite if file already exists?

Layout

Select a layout template to arrange Web Parts in zones on the page. Multiple Web Parts can be added to each zone. Specific zones allow Web Parts to be stacked in a horizontal or vertical direction, which is illustrated by differently colored Web Parts. If you do not add a Web Part to a zone, the zone collapses (unless it has a fixed width) and the other zones expand to fill unused space when you browse the Web Part Page.



Choose a Layout Template:

- Header, Footer, 3 Columns
- Full Page, Vertical
- Header, Left Column, Body
- Header, Right Column, Body
- Header, Footer, 2 Columns, 4 Rows
- Header, Footer, 4 Columns, Top Row
- Left Column, Header, Footer, Top Row, 3 Columns
- Right Column, Header, Footer, Top Row, 3 Columns



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Project Online Demo

PDPs and Workflows

Workflow Stages ⓘ

NEW WORKFLOW STAGE	X 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	

Question and Answer

Send questions to Info@ppmworks.com



PPM Works Upcoming Webinars

October 18th
@ 1 PM

Managing Task Types – Why does my duration and/or work keep changing?

November 1st
@ 1 PM

Automating Project Status Reports

November 15th
@ 1 PM

Creating Project Online Workflows Using SharePoint Designer

December 6th
@ 1 PM

Power BI: Making Your Report Look Professional

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<https://www.linkedin.com/company/ppm-works-inc->

Our Site: www.ppmworks.com

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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

Contact Us

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

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