Task Management at its Simplest: Integrating Project Online and Planner … the Best of Both Worlds

Presented by PPM Works

January 23rd, 2018

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Agenda

1. What is Task Management
2. Overview of Microsoft Project, Planner, and Team Productivity
3. Linking Plans to Tasks in Project Online
4. When to Use Planner vs Project Online
5. Question and Answer

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- Microsoft Community Leader Award 2012 - 2017
- PDD Instructor and Speaker at PMI Conferences 2012-2018, Project Summit 2013-2018, Microsoft Project Conferences (and Project Virtual Confs)
- Board Member of the Boston YMCA, and Boston & South Florida MPUG Chapters
- Lead SME and writer for the MCTS Exam 70-178, Managing Projects
- MPUG Project Certification Instructor
- Life-long trainer and consultant with strong background in project management, specializing in developing and improving PM processes for clients and training
- Volunteer with the YMCA, enjoy traveling with family, and training for races
- PMI member since 2004

Project MPUG Boston

the YMCA

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Register at:
http://ppmworks.com/events/

Events/webinars:

- 1/25 – Best Practice Webinar for Project Site Template Development
- 1/30 - PPM Summit (Edina, MN) and Happy Hour – Come have a drink (or 2) on us

Demo Series Every Tuesday at 1pm Eastern

- 1/30 – Successful Multi-Project Management
- 2/6 - Everything You Want to Know About Portfolio Management
- 2/13 - A Comprehensive Look Into Project Management
- 2/20 - Keys to Effective Resource Management
- 2/27 – Getting to your Data-Driven Decisions with Project Team Collaboration & Reporting

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Hope to see you there!

Learning Objectives

At the end if this webinar, participants will understand the differences and use cases for Office 365 Productivity tools (highlighting Project Online and Planner)

Participants will be able to:

1. Understand **Task Management** and **Work Management**
2. Planner and Project Online **Use Cases**
3. Get started using **Planner and Project** (assigning tasks, track progress, and communicating with your team)
4. **Determine when to use:** Planner, Project Online, Linking, and/or Integration

Use Case Scenarios

1. Planner
2. Project Online
3. Link from Project to Planner
4. Integration from Project to Planner

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Session Goals

- Understanding the Microsoft Work Management Solutions
  - Project Online and Planner Use Cases
    --
    When to Integrate
- Equip You to Get Started Today
  - Quick Reference on Steps to Get Started
- Make the Most of Your Time
  - Fast-pace, Condensed Content

Use **Q and A tab** for questions
Respond to the **Poll** in the middle of the session
Live Question and Answer session at the end of the session

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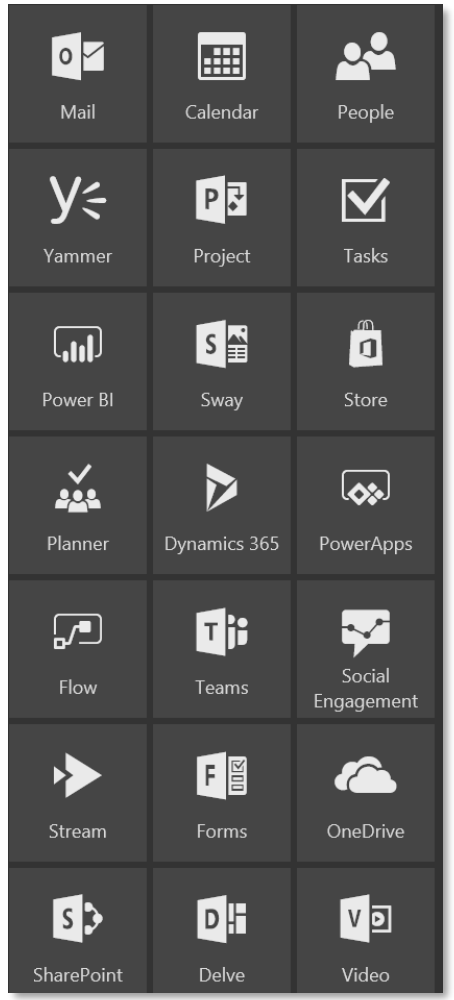
Quick Question for Group

What tools are your organization using today to facilitate collaboration and manage effort? (Project, Excel, O365, Shared Drives, To Do, Yammer, etc)

Respond in the Chat Window

How do you know…

1) who is working on what?
2) when things are due?
3) if they can be completed on time?
4) if people are working on the right things at the right time?



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How You Work

Me Work

Focusing on individual activities and tasks that do not involve others but are important to the company

We Work

Working with my peers and other groups on ad-hoc projects, and longer term communities of interest

Department Resources

Structured resources for large groups of people that are focused on a common goal or area of the company

Company Connection

Finding and consuming content that connects me to the whole company and success of the business.

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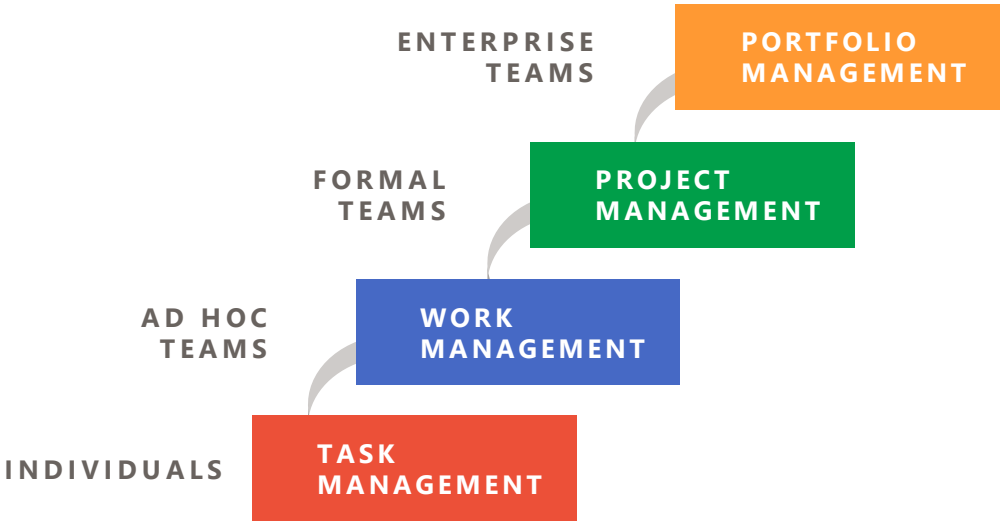
MICROSOFT'S PROJECT AND TEAM PRODUCTIVITY SOLUTIONS



Tools for all uses

Best experience across devices

Seamless Browser & Desktops

Calendars & Schedules

Content Management

Task Management

Enterprise Social & Messaging

Flexible Reporting & Analytics

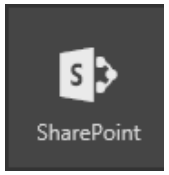
Integrated solutions for individuals, teams and major programs

Project Online and Planner

AD HOC TEAMS

WORK MANAGEMENT

SharePoint



Foundational solution for groups, lists, workflows and content sharing.

Planner

An Office 365 App to create a team, build a plan, assign tasks and check progress. Planner is about simplicity & ease of ramp up and use.

FORMAL TEAMS

PROJECT MANAGEMENT

Project Online

Plan, Manage
Execute

A scalable solution for schedule, resource, cost and time management. Templates, wizards and real-time reporting improve controls, while team sites, notifications and apps guide team members to deliver better results. Designed for advanced and formal project management approach and allows for Adhoc as well.

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When to Use Planner vs Project Online

Use Case	Planner	Project Online
I need to track tasks but I am unfamiliar with project management tools.	X	
I want to quickly enable my team to use OneNote, Outlook, SharePoint.	X	
I am resistant to learning a new tool.	X	
I prefer a detailed WBS, with task dependencies, and task tracking against baselines.		X
Our organization uses timesheets to track task progress.		X
I need to track progress for all my projects and the portfolio level with executive visibility.		X
I need to create custom views, groups, and filters for tasks		X
I want to easily track risks, issues, and deliverables		X
I want a simplified visual that displays who is doing what and what progress has been made.	Link to Planner	
I want to manage my project schedule in Microsoft Project and allow the flexibility for team members to track and progress their tasks where they prefer. I need visibility of progress and who is doing what.	Integration at Task Level	

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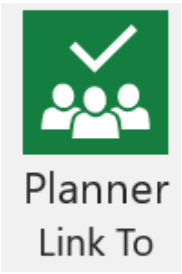
Use Case Scenarios

1. Planner

2. Project Online

3. Link from Project to Planner



4. Integration from Project to Planner

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Use Case Scenario #1

Diane Prescott is a product marketing manager for Contoso, which specializes in cutting-edge consumer technology. She's leading the **planning efforts** for an upcoming tech conference where Contoso will showcase one of its newest products, a virtual reality headset named the Wingtip.

She spends most of her time **coordinating tasks by email and debriefing on progress with her team once a day by phone**.

Contoso has robust project management software, but it's much too involved for Diane, whose expertise is in marketing, not project management.

Summary:

- Planning efforts
- Coordinates tasks by email
- Daily Progress (by phone)
- Contoso has robust project management software
- Too involved for Diane, whose expertise is in marketing, not project management.

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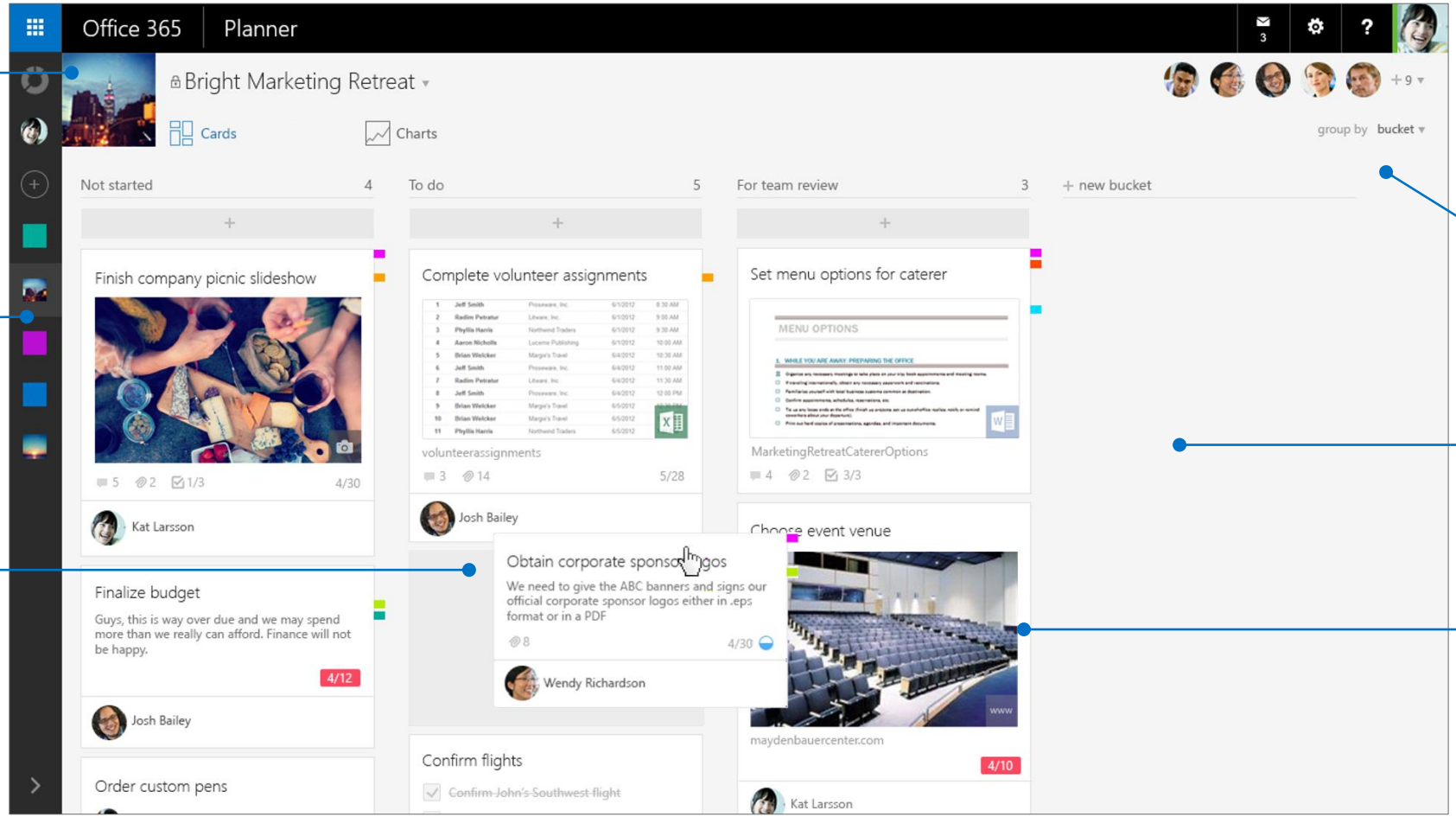
Planner Task Board

New Office 365 service
Fully integrated into the suite and Office 365 Groups

My work organized
Access the Planner Hub, My Tasks, and all Plans ordered by activity

Interactive Boards
Track and organize your team's work by moving cards between columns



Build your team
Built in experience for adding members and assigning work

Customizable columns
Customize each board to the exact needs of your team, process, and content.

Visual and engaging
Document previews, images, and summary in stats make it easy to get an overview

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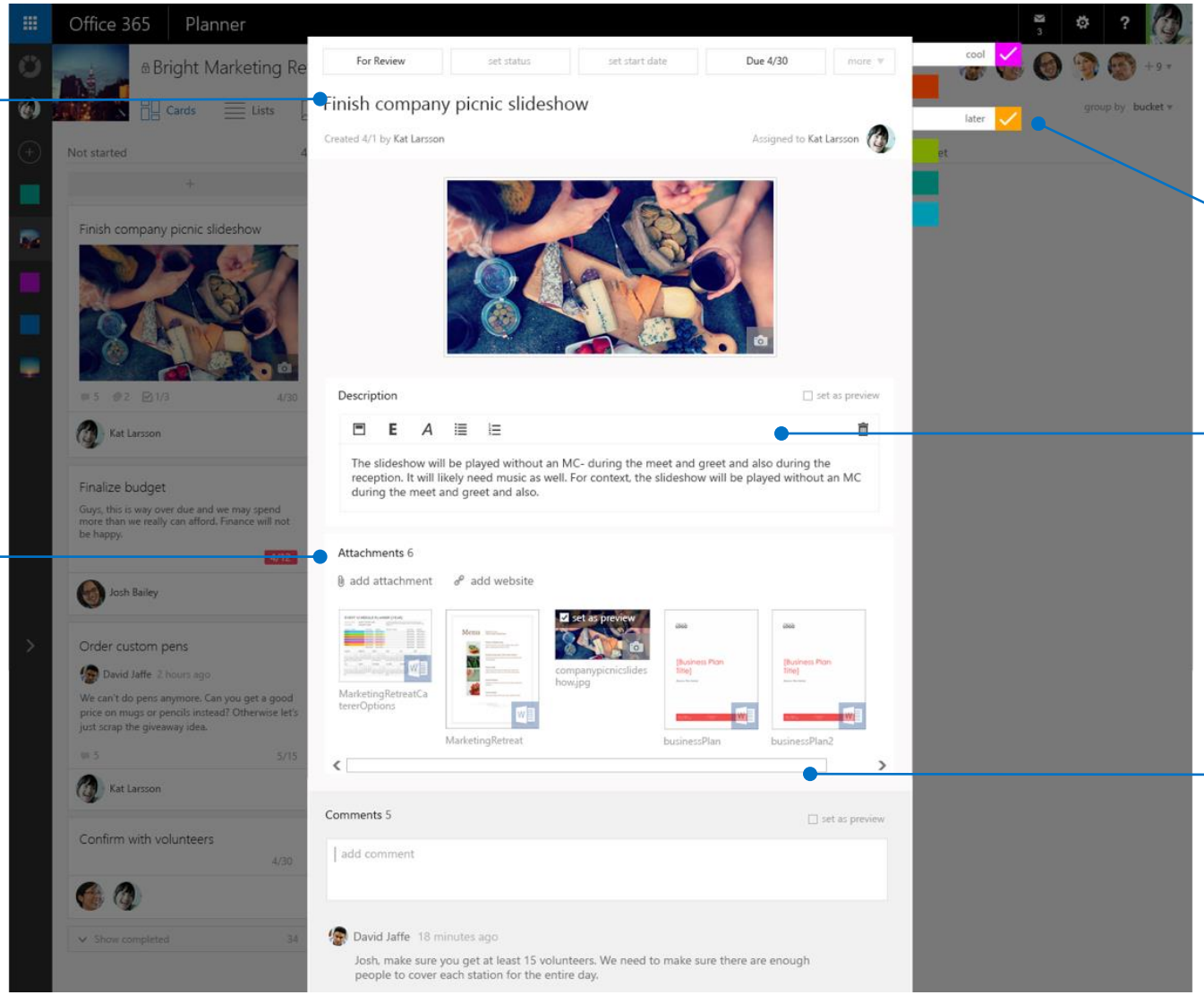
Planner Task Details

Focus on the details
Rich details experience include progress, start and due dates, assignments, and description.



Documents and attachments
Easily upload new files, attach links, or pick from existing OneDrive for Business content

Custom labels
Highlight key tasks with colorful customizable labels.

Checklists
Breakdown complex items into manageable steps. Jot down ideas to make progress (GA)

Conversations
Discuss each task to get things done. Conversations show up in Outlook clients and are powered by the Outlook services.

Planner

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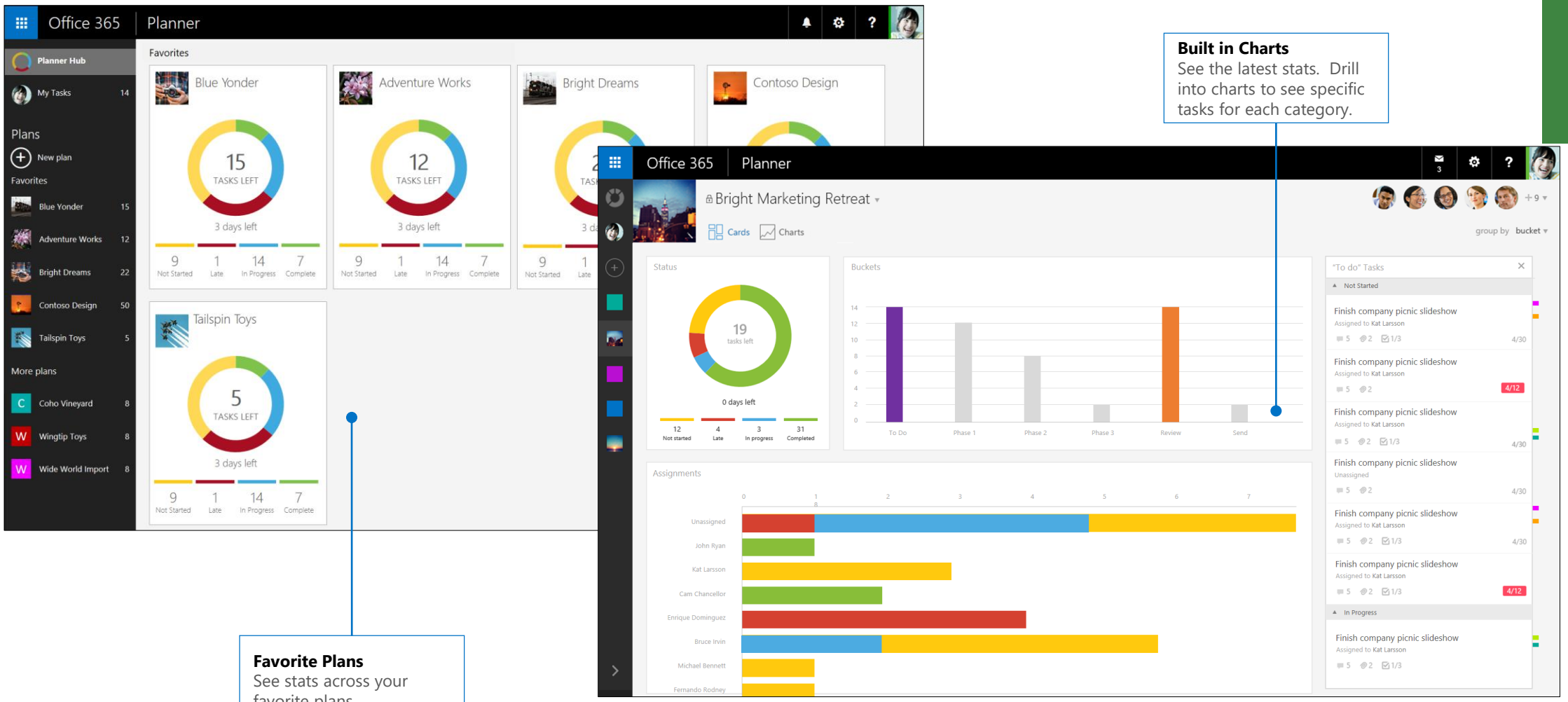
Planner Hub and Charts



Built in Charts
See the latest stats. Drill into charts to see specific tasks for each category.

Favorite Plans
See stats across your favorite plans

Planner

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Microsoft

Planner and Project Demo

- **Planner**
- Project Online
- Project Link to Planner
- Project to Planner Integration

Project Online Demo

Project

Use Case Scenario #2

Raul Peterson is a project manager for Contoso, which specializes in cutting-edge consumer technology. He manages many **projects across the organization** and requires **visibility** as to the status of his projects. He needs more time in the day for **project status.** Raul needs to create cross project **dependencies,** and **track issues** and **risks** across projects. Contoso has **robust project management software** and Raul wants to use it.

Summary:

- Project pro is known
- Cross-project Task view
- Automate status reports
- Track Issues, Risks and create cross project dependencies

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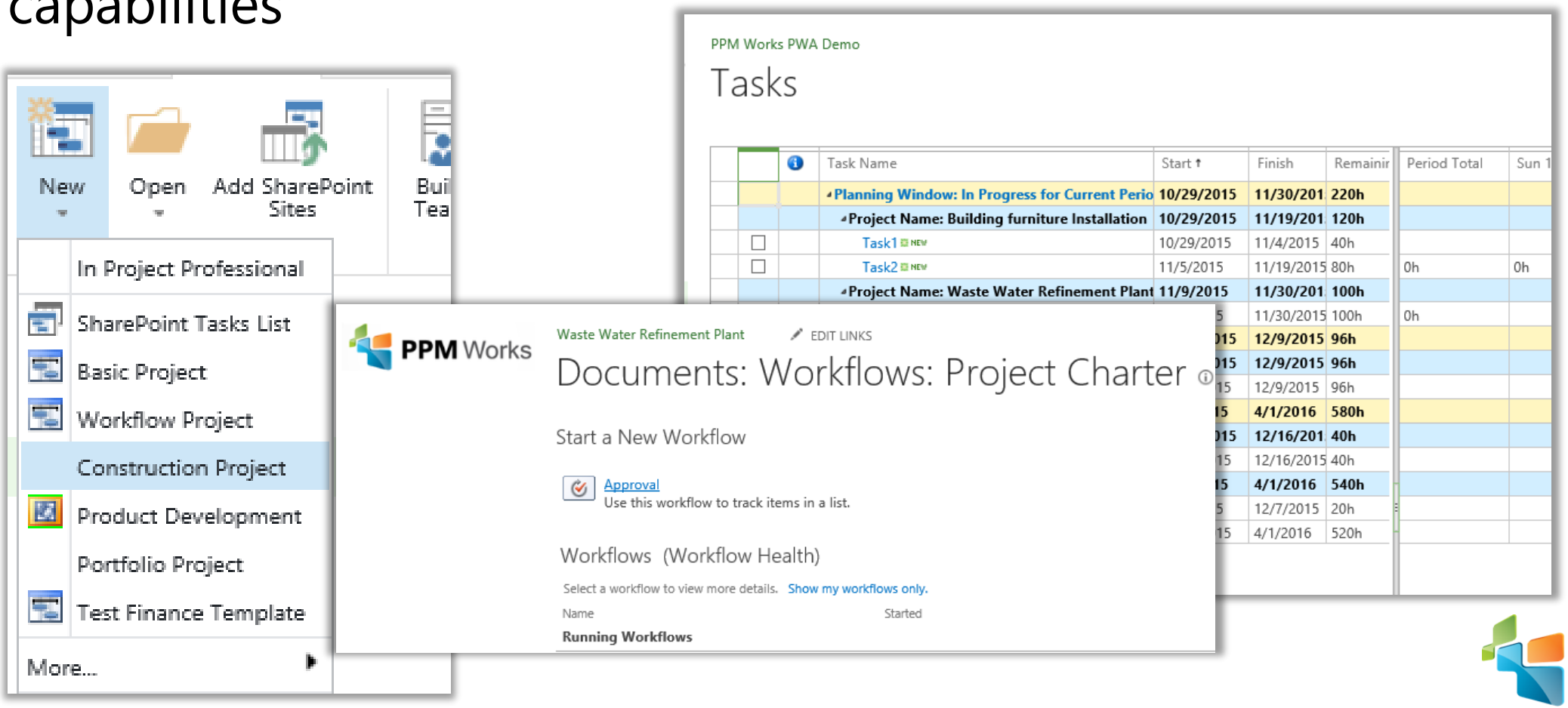
Task Management

Project Creation, Task Updates, and Document Approval Workflow

Leveraging out of the box Project Creation and tracking/approval capabilities



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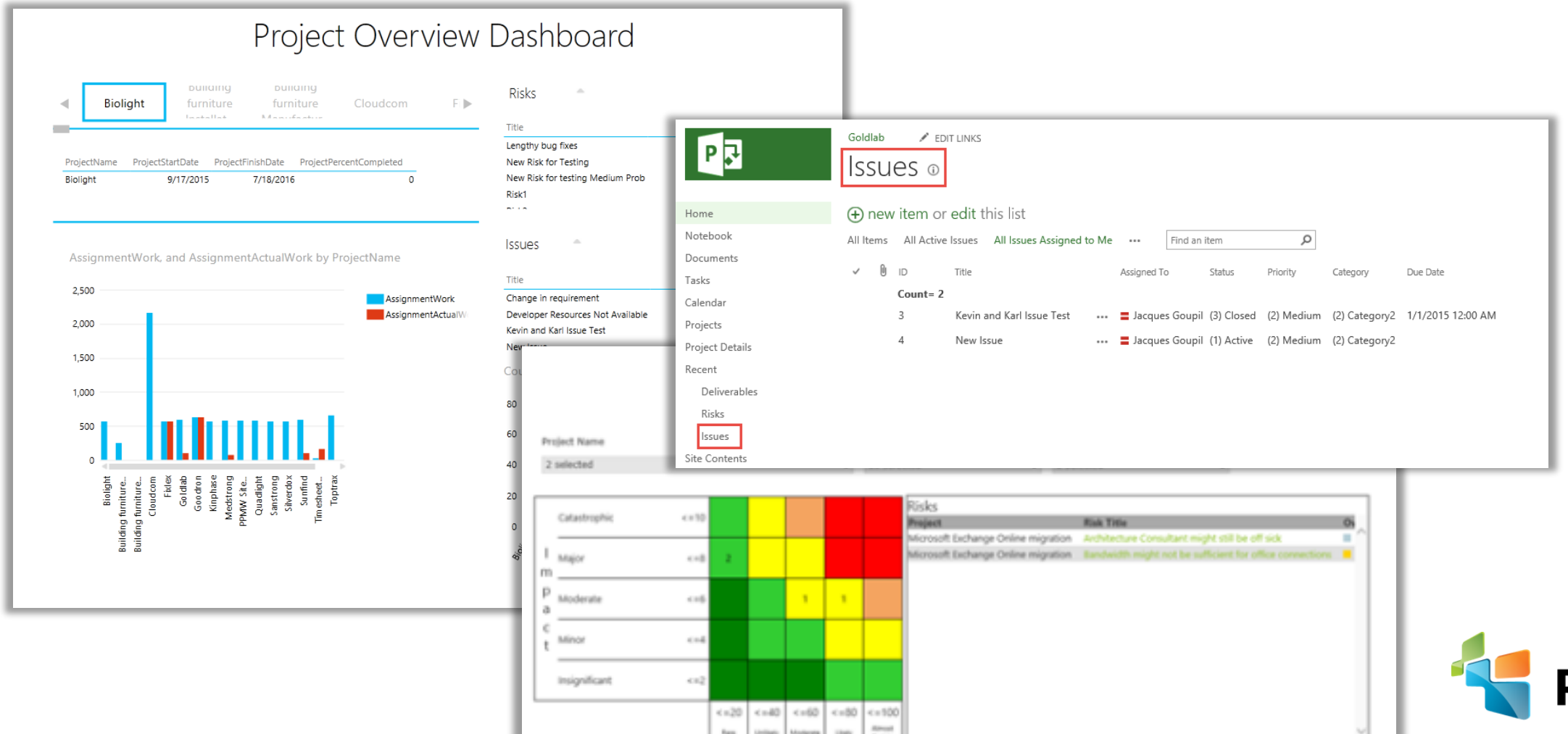
Risk / Issue Management

Flexible Reporting including Excel, Power BI, Dash boarding



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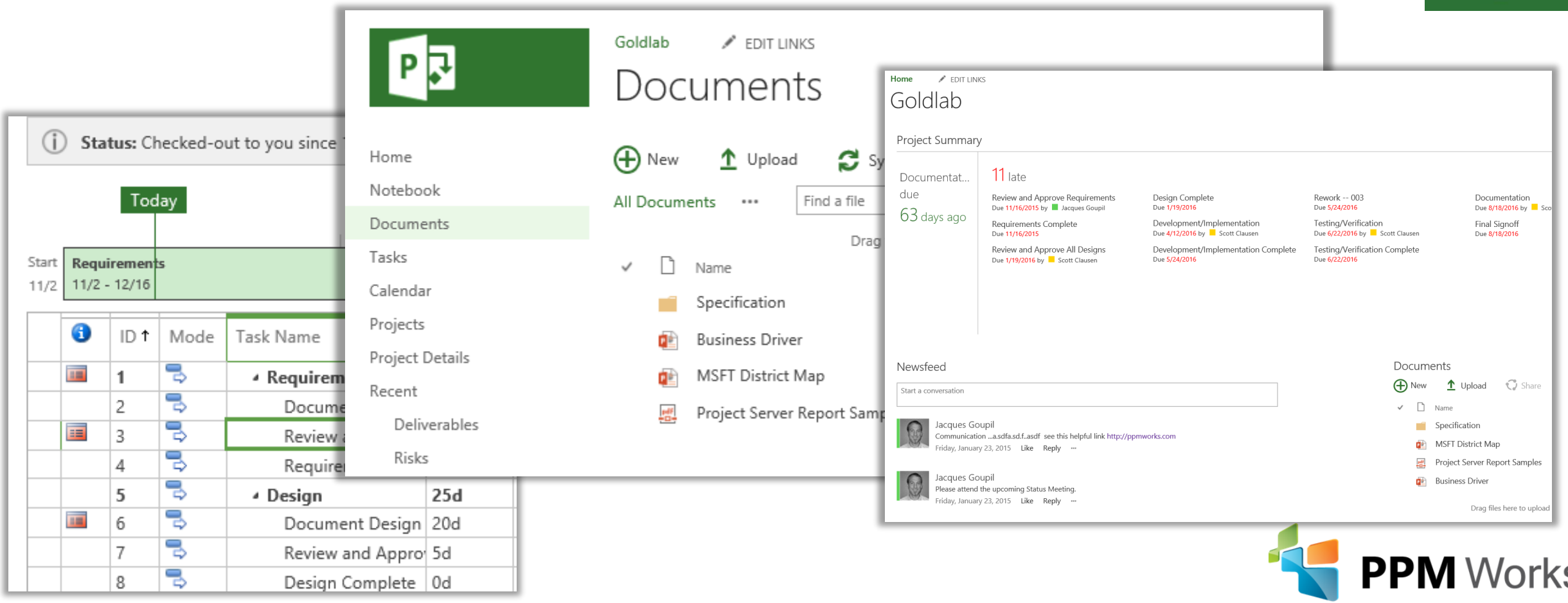
Team Collaboration and Doc Management

Easy Collaboration with Project Site and Documents at a project or task level.



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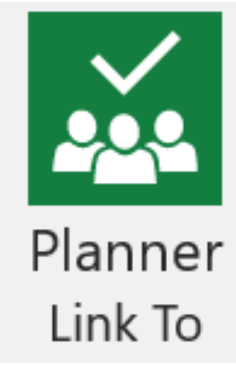
Use Case Scenario #3

Mary Sweh want to manage her project in Project and allow for detailed work to be completed/tracking in Planner. She does not want the two to sync. She prefers them separate.

As a project manager she wants he teams to stay happy and **choose their preferred tool** however the teams do not track at the same level as her project calls for.

They need to be able to **link to the details** in Planner if Project Managers need to get to Planner. Looking for a **central repository projects**.



Summary:

- Allows link from Project to Planner
- Project Task to Planner Plan
- Task status is not connected

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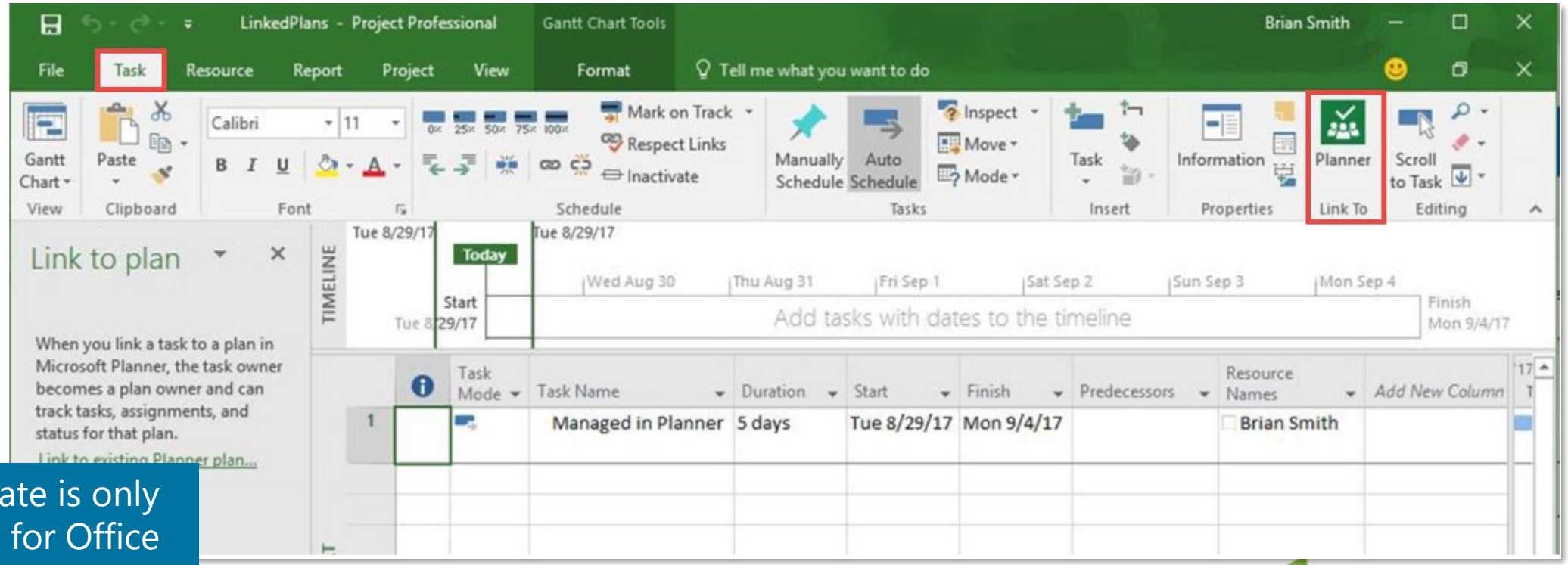
Linking Plans to a Project Task

Note: You need Project Professional (via Project Online) to see the new *Planner Link* on the Task ribbon



This update is only available for Office 365 subscriptions.

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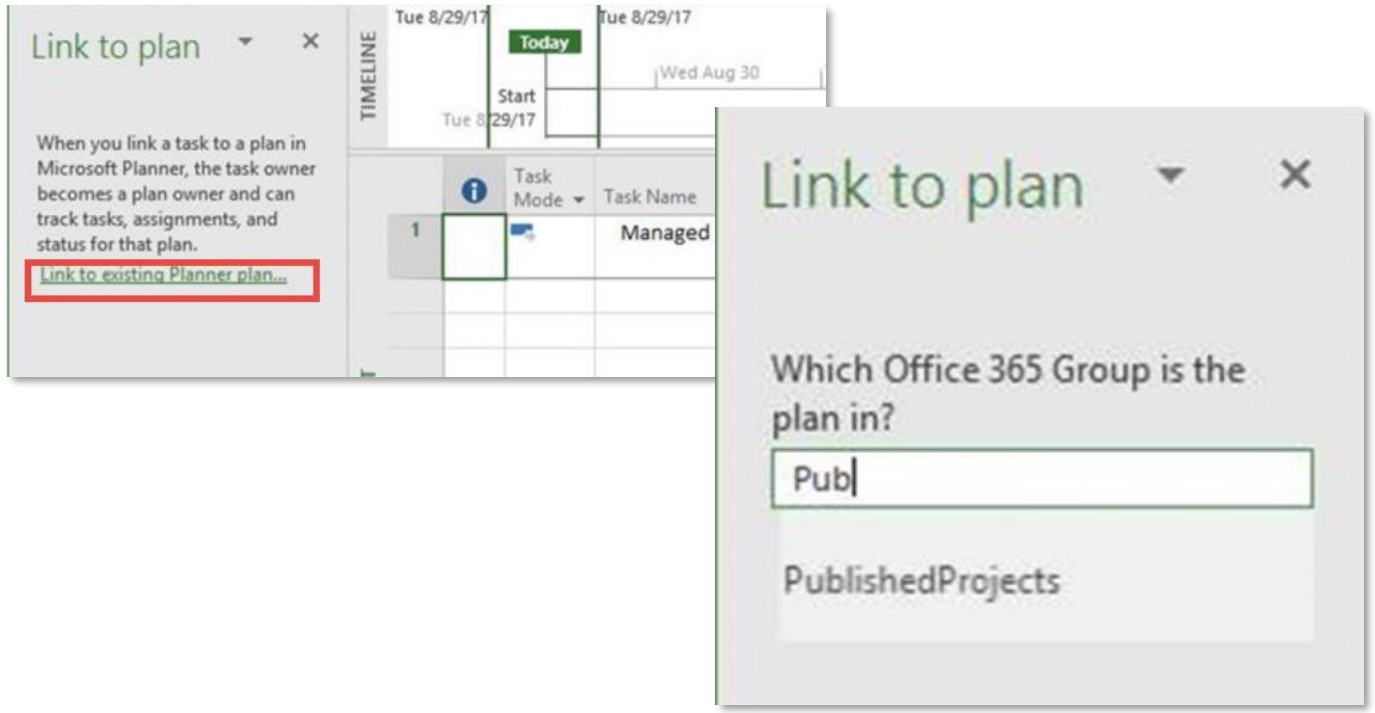
Linking Plans to a Project Tasks

The guide will open to the left of the project schedule.

- Select the link to view a list of Office 365 Groups
- Start typing to search for a group



Both the project and the task must be published to create the link.

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Planner and Project Demo

- Planner
- Project Online
- **Project Link to Planner**
- Project to Planner Integration

Project Online Demo

Project

Use Case Scenario #4

Diane Prescott and Raul Peterson both work for Contoso, which specializes in cutting-edge consumer technology. As a product manager and project manager they both want the **flexibility to choose** how they manage their projects and tasks.

They need to be able to **associate files with individual tasks** and provide a **central repository** for project and task related documents. Their managers want to see **reports for all of their projects**. They also want to be able to **view high–level project status**.

Summary:

- Tool integration allows for using both Planner and Project Online
- Document libraries
- Portfolio-level and project-level status reports
- Custom views
- Best of both worlds

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Integration from Project Online to Planner

We perform all types of Integrations:

1) **Leverage existing tools (ours and partner created)**
2) **Deploy Standard Operating Procedures**
3) **Implement process change**
4) **Develop custom code and apps**
5) **Feature set deployment – working with Microsoft on future releases**

Integration Planning: Understand your needs and provide you with options

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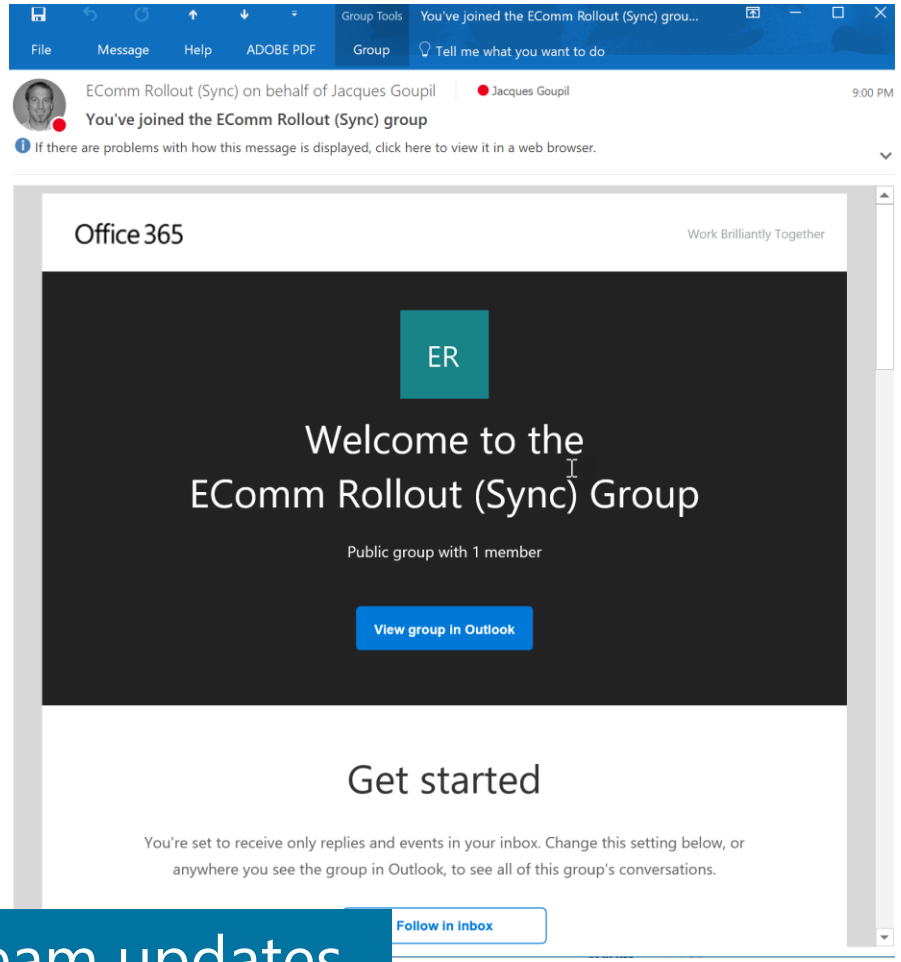
Integration from Project Online to Planner

Bi-Directional Sync to/from Project Online to Planner

- Project Online Task to Planner Task
- Option to set the Sync per Task
- Schedule Sync or perform On Demand
- Associate Project Task to specific Planner Bucket

What happens with the Sync?

1. Sync will create a new Planner Plan
2. Email to the group that the Plan was created
3. Establishes link between Project and Planner
4. Allows for progress from either tool
   Progress to % Complete



Flexibility on where the team updates and creates tasks

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Planner and Project Demo

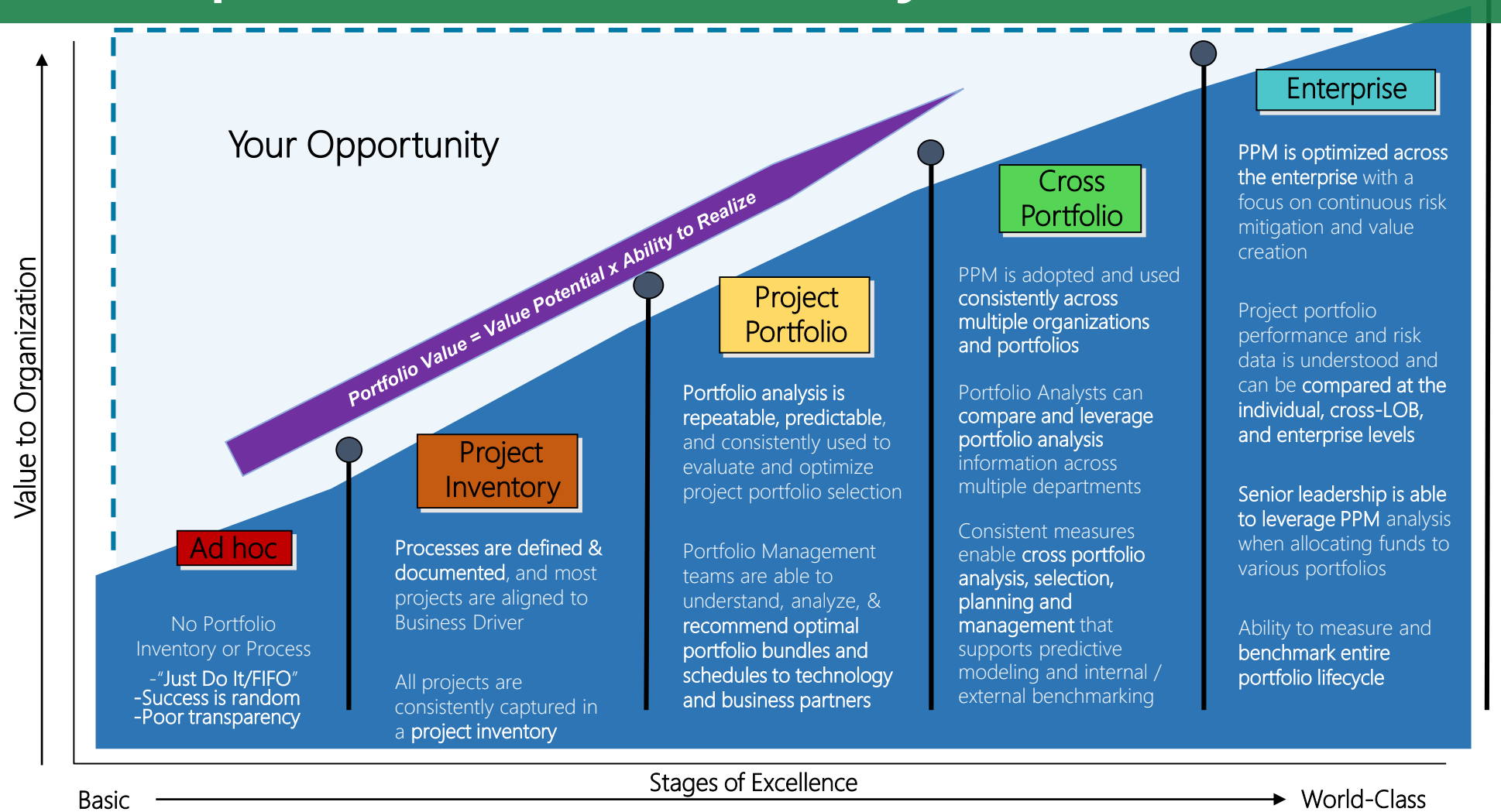
- Planner
- Project Online
- Project Link to Planner
- **Project to Planner Integration**

Project Online Demo

Project

Roadmap to PPM Maturity

Across the Organization



OneDrive - Microsoft | Sharepoint Online — **Crawl** — Planner — **Walk** — P — **Run** — Office 365 | Planner | P — **Well-oiled Machine**

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Feature Comparison

Feature	Planner	Project Online
Mobile Friendly views	+	+
Security – who can view/edit project/plan	+	+
Upload documents associated with projects	+	+
Assign task to multiple resources	+	+
Associate documents with individual tasks	+	+
Track progress	+	+
Graphical task-level view	+	+
My Task Summary view	+	+
Project-level discussion and collaboration	+	+
Task-level discussion and collaboration	**+**	**-**
Included in Office365 Suite (no additional license cost)	**+**	**-**

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Feature Comparison

Feature	Planner	Project Online
Scheduling engine (Start and Finish calculated by pred/succ tasks	-	+
Portfolio Views	-	+
Portfolio Views with indicators	-	+
Supports Master Projects/Sub Projects	-	+
Create custom views	-	+
Custom project-level fields	-	+
Track effort and cost	-	+
Manage issues, risks, and deliverables	-	+
Customize the User Interface	-	+
Timesheets	-	+
Multiple levels of tasks supported	+	+
Schedule Templates	+	+

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Quick Poll

- Help us Help You
- 30 seconds to answer 2 poll questions

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Upcoming webcast schedule

2/27 – PPM insights and analytics with Project Online and Power BI

Register here

3/27 – Evaluate benefits and reforecast clearly with Project Online

Register here

Microsoft

Upcoming PPM Works schedule

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- 2/27 – Getting to your Data-Driven Decisions with Project Team Collaboration & Reporting

Hope to see you there!

Upcoming PPM Works Events

Date	Event	Event Type	Location
1/25/18 12 - 1 PM EST	**Best Practices for SharePoint Project Site Template Development**	Webinar	Online
1/30/18 1 - 2 PM EST	**Successful Multi-Project Management**	Webinar	Online
1/30/18 8:30 AM – 3 PM CST	**PPM Summit and Happy Hour**	Conference	Microsoft Office – Edina, MN
2/6/18 1 - 2 PM EST	**Everything You Want to Know About Portfolio Management**	Webinar	Online
2/13/18 1 - 2 PM EST	**A Comprehensive Look Into Project Management**	Webinar	Online
2/20/18 1 - 2 PM EST	**Keys to Effective Resource Management**	Webinar	Online
2/27/18 1 - 2 PM EST	**Getting to your Data-Driven Decisions With Project Team Collaboration & Reporting**	Webinar	Online

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Hope to see you there!

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LinkedIn: www.linkedin.com/in/jacquesgoupil/ and *https://www.**linkedin**.com/company/**ppm-works-inc***
Our Site: www.ppmworks.com
Blog: http://blogs.ppmworks.com

Call to Action

Calls to Action

- Reach out to us if you are interested in our Project to Planner services
- Request a recording copy @ **info@ppmworks.com**
- Request PDUs
- Check out upcoming events, blogs, and webcasts
- Get LinkedIn with me (Jacques Goupil)
- Ask questions and use the tool!

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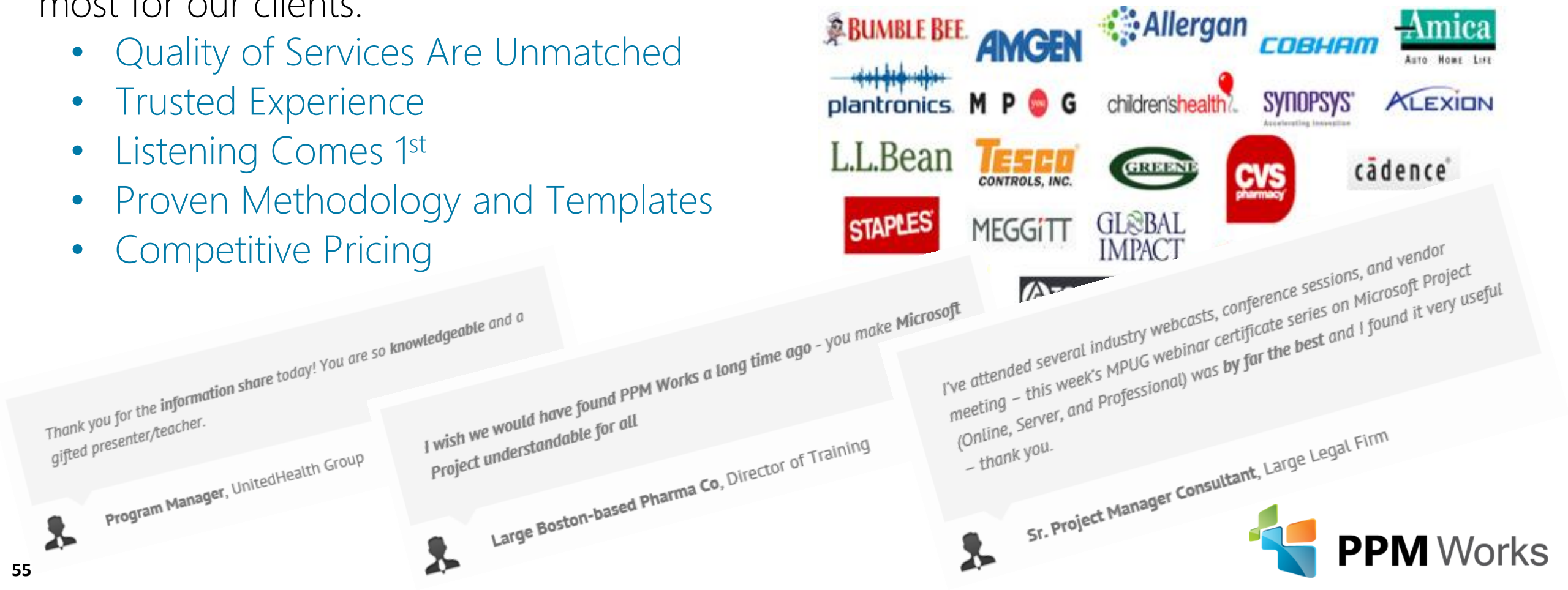
Why Clients Choose PPM Works

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



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Contact Us

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