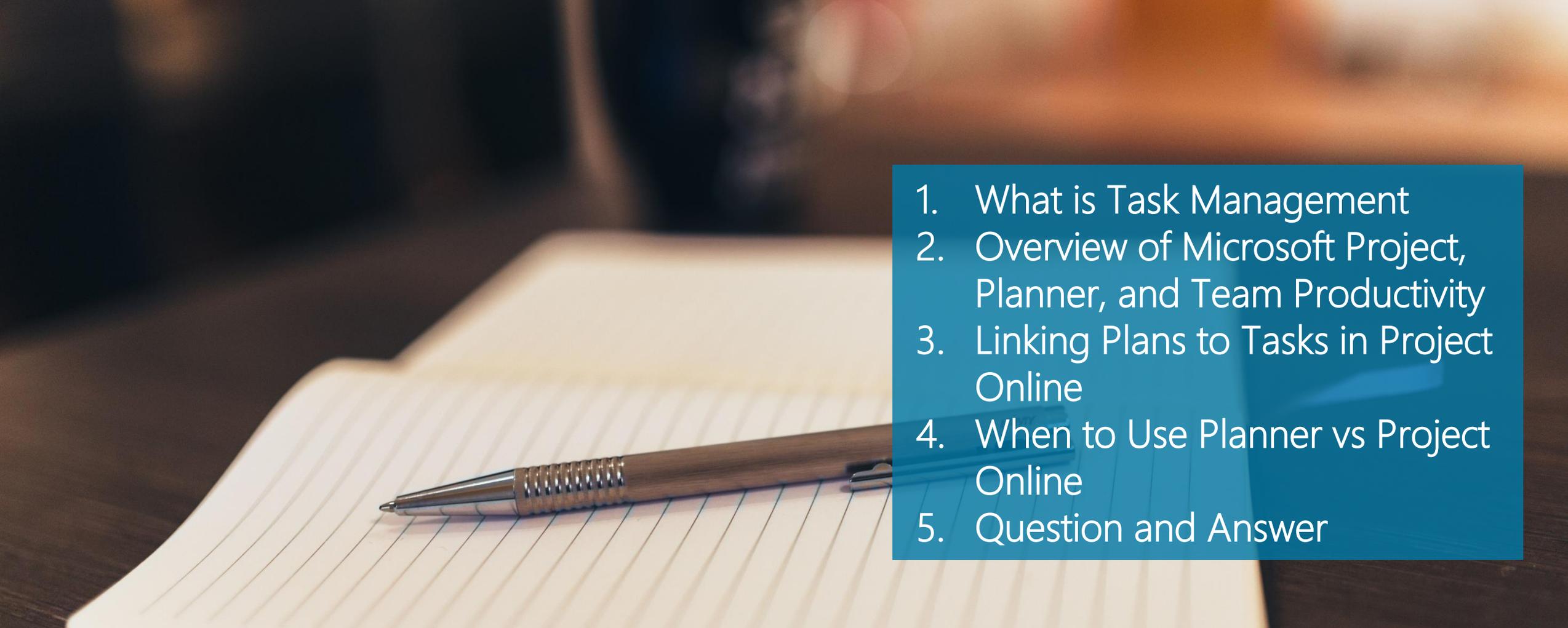




# Task Management at its Simplest: Integrating Project Online and Planner ... the Best of Both Worlds

Presented by PPM Works

January 23<sup>rd</sup>, 2018

- 
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

# Agenda

# Presenter: Jacques Goupil, PMP, MCTS, MCP



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**PPM Works**

- 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



# Upcoming PPM Works schedule



**Register at:**

**<http://ppmworks.com/events/>**



**PPM Works**

## 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

Hope to see you there!

# Learning Objectives

At the end of 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



# 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

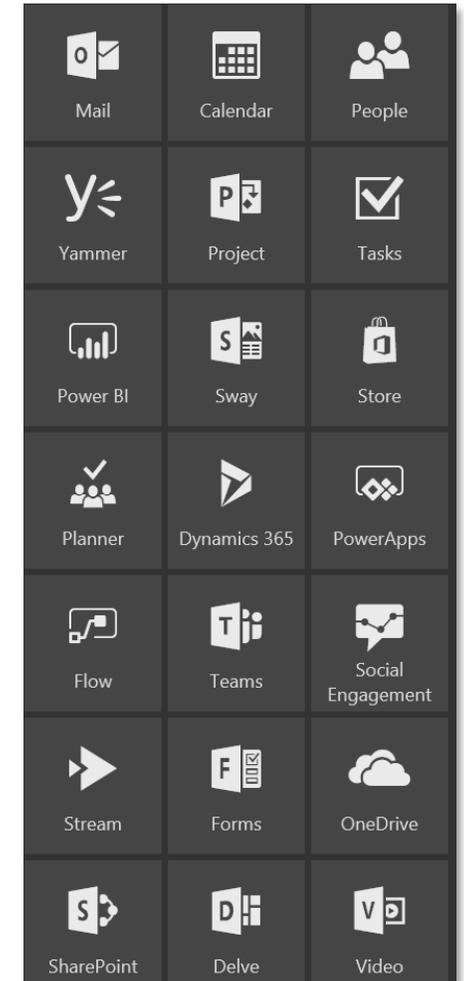
# Quick Question for Group

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?



# 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



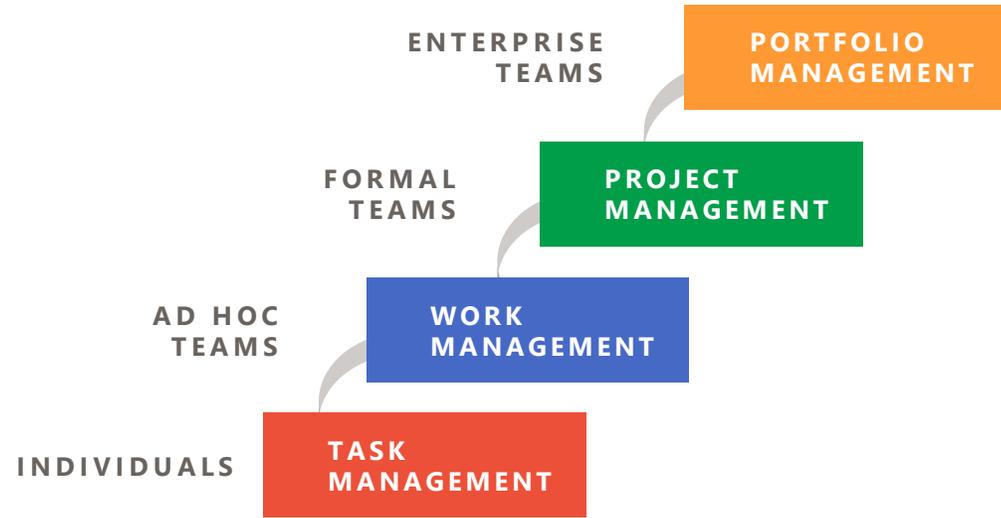
Structured resources for large groups of people that are focused on a common goal or area of the company

## Company Connection



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

# 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

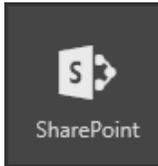
Integrated solutions for individuals, teams and major programs

# Project Online and Planner

## AD HOC TEAMS

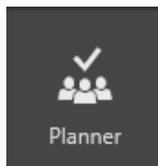
### WORK MANAGEMENT

#### SharePoint



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

#### Planner

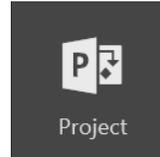


An Office 365 App to create a team, build a plan, assign tasks and check progress. Planner is about simplicity & ease of ramp up and use.

## 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.

# 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.	<a href="#">Link to Planner</a>	
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.	<a href="#">Integration at Task Level</a>	

# Use Case Scenarios

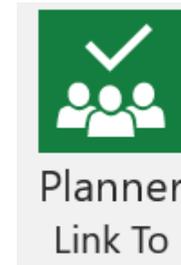
1. Planner



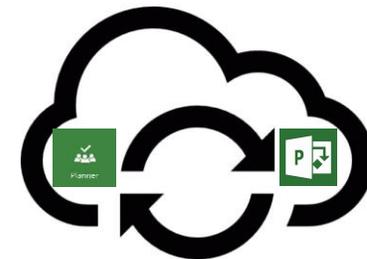
2. Project Online



3. Link from Project to Planner



4. Integration from Project to Planner



# 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.



# 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

Office 365 | Planner

Bright Marketing Retreat

group by bucket

Not started 4 To do 5 For team review 3 + new bucket

Finish company picnic slideshow

Complete volunteer assignments

1	Jeff Smith	Proseware, Inc.	6/1/2012	8:30 AM
2	Rudolf Pratner	Litware, Inc.	6/1/2012	9:00 AM
3	Phyllis Harris	Northwind Traders	6/1/2012	9:30 AM
4	Aaron Michelle	Lucerne Publishing	6/1/2012	10:00 AM
5	Brian Welcker	Marga's Travel	6/4/2012	10:30 AM
6	Jeff Smith	Proseware, Inc.	6/4/2012	11:00 AM
7	Rudolf Pratner	Litware, Inc.	6/4/2012	11:30 AM
8	Jeff Smith	Proseware, Inc.	6/4/2012	12:00 PM
9	Brian Welcker	Marga's Travel	6/5/2012	
10	Brian Welcker	Marga's Travel	6/5/2012	
11	Phyllis Harris	Northwind Traders	6/5/2012	

volunteerasignments

MarketingRetreatCatererOptions

Choose event venue

Obtain corporate sponsor logos

We need to give the ABC banners and signs our official corporate sponsor logos either in .eps format or in a PDF

4/30

Wendy Richardson

Finalize budget

Guys, this is way over due and we may spend more than we really can afford. Finance will not be happy.

4/12

Josh Bailey

Confirm flights

Confirm-John's-Southwest-flight

Order custom pens

## 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



# 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

The screenshot displays the Microsoft Planner interface. The main task is 'Finish company picnic slideshow', assigned to Kat Larsson, with a due date of 4/30. The task description includes a photo of a picnic and text: 'The slideshow will be played without an MC- during the meet and greet and also during the reception. It will likely need music as well. For context, the slideshow will be played without an MC during the meet and greet and also.' The attachments section shows several files, including 'MarketingRetreatCa', 'MarketingRetreat', 'companypicnicslides how.jpg', 'businessPlan', and 'businessPlan2'. The comments section shows a comment from David Jaffe: 'Josh, make sure you get at least 15 volunteers. We need to make sure there are enough people to cover each station for the entire day.'

## 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 Hub and Charts

Office 365 Planner

Planner Hub

My Tasks 14

Plans

New plan

Favorites

Blue Yonder 15

Adventure Works 12

Bright Dreams 22

Contoso Design 50

Tailspin Toys 5

More plans

Coho Vineyard 8

Winglip Toys 8

Wide World Import 8

Blue Yonder: 15 TASKS LEFT, 3 days left

Adventure Works: 12 TASKS LEFT, 3 days left

Bright Dreams: 2 TASKS LEFT, 3 days left

Tailspin Toys: 5 TASKS LEFT, 3 days left

**Favorite Plans**  
See stats across your favorite plans

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



Office 365 Planner

Bright Marketing Retreat

Charts

Status: 19 tasks left, 0 days left

Buckets: To Do, Phase 1, Phase 2, Phase 3, Review, Send

Assignments: Unassigned, John Ryan, Kat Larsson, Cam Chancellor, Enrique Dominguez, Bruce Irvin, Michael Bennett, Fernando Rodney

To do Tasks

- Not Started
- Finish company picnic slideshow (Assigned to Kat Larsson)
- Finish company picnic slideshow (Assigned to Kat Larsson)
- Finish company picnic slideshow (Assigned to Kat Larsson)
- Finish company picnic slideshow (Assigned to Kat Larsson)
- Finish company picnic slideshow (Assigned to Kat Larsson)
- Finish company picnic slideshow (Assigned to Kat Larsson)
- Finish company picnic slideshow (Assigned to Kat Larsson)
- In Progress
- Finish company picnic slideshow (Assigned to Kat Larsson)



## Planner and Project Demo

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

Project Online Demo

# 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



# Task Management

Project Creation, Task Updates, and Document Approval Workflow

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



A screenshot of the SharePoint ribbon menu. The 'New' button is selected, and a dropdown menu is open. The menu items are: 'SharePoint Tasks List', 'Basic Project', 'Workflow Project', 'Construction Project' (highlighted), 'Product Development', 'Portfolio Project', and 'Test Finance Template'. There is also a 'More...' button at the bottom.

PPM Works PWA Demo

## Tasks

	Task Name	Start	Finish	Remaining	Period Total	Sun 1
	▶ <b>Planning Window: In Progress for Current Perio</b>	10/29/2015	11/30/2015	220h		
	▶ <b>Project Name: Building furniture Installation</b>	10/29/2015	11/19/2015	120h		
<input type="checkbox"/>	Task1 NEW	10/29/2015	11/4/2015	40h		
<input type="checkbox"/>	Task2 NEW	11/5/2015	11/19/2015	80h	0h	0h
	▶ <b>Project Name: Waste Water Refinement Plant</b>	11/9/2015	11/30/2015	100h		
			11/30/2015	100h	0h	
			12/9/2015	96h		
			12/9/2015	96h		
			12/9/2015	96h		
			4/1/2016	580h		
			12/16/2015	40h		
			12/16/2015	40h		
			4/1/2016	540h		
			12/7/2015	20h		
			4/1/2016	520h		

A screenshot of the PPM Works interface for workflow management. The title is 'Documents: Workflows: Project Charter'. It shows a 'Start a New Workflow' section with an 'Approval' workflow option. Below that, there is a 'Workflows (Workflow Health)' section with a table for running workflows.

Waste Water Refinement Plant EDIT LINKS

## Documents: Workflows: Project Charter

Start a New Workflow

[Approval](#)  
Use this workflow to track items in a list.

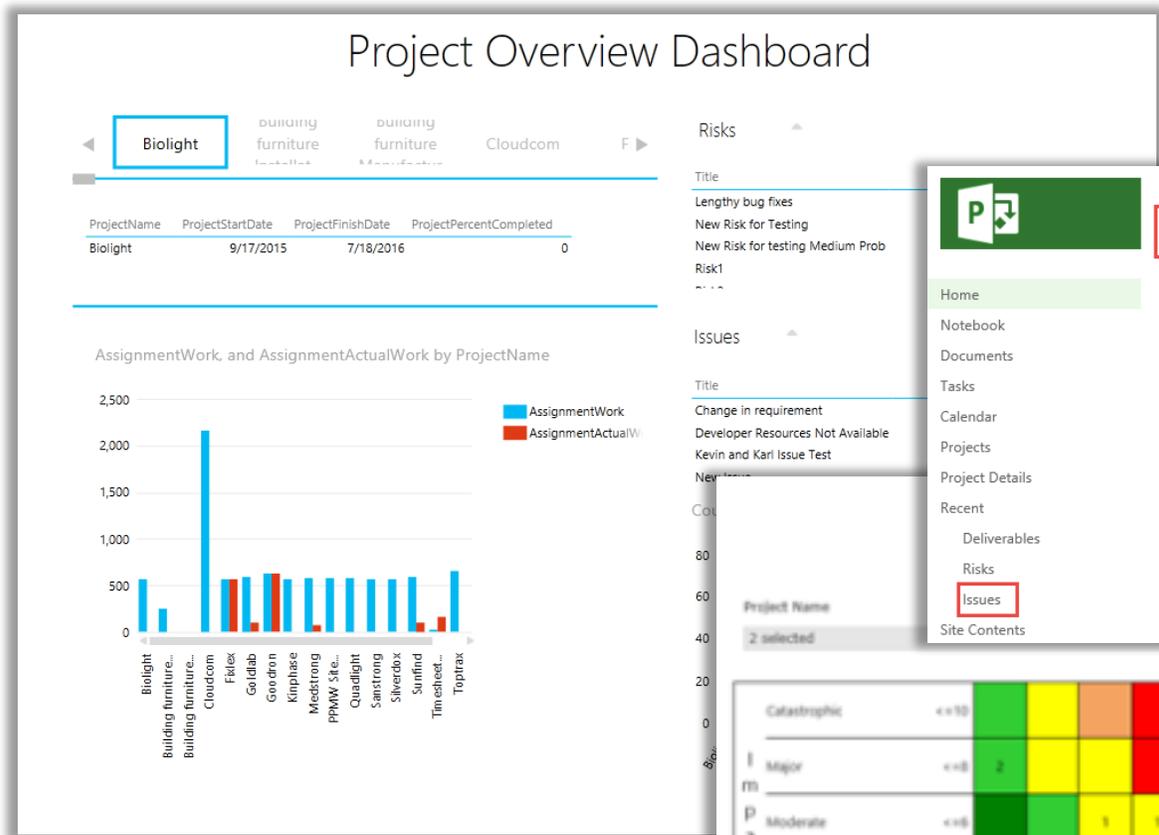
Workflows (Workflow Health)

Select a workflow to view more details. [Show my workflows only.](#)

Name	Started
<b>Running Workflows</b>	

# Risk / Issue Management

Flexible Reporting including Excel, Power BI, Dash boarding



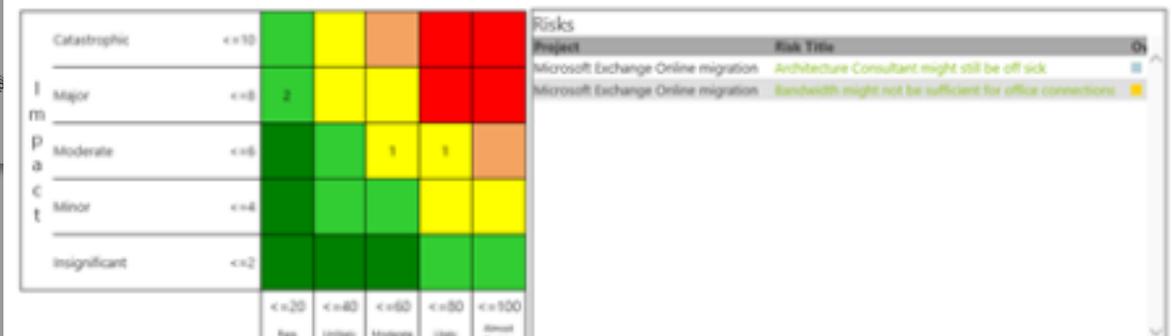
### Goldlab Issues

Home | Notebook | Documents | Tasks | Calendar | Projects | Project Details | Recent | Deliverables | Risks | **Issues** | Site Contents

+ new item or edit this list

All Items | All Active Issues | All Issues Assigned to Me | Find an item

ID	Title	Assigned To	Status	Priority	Category	Due Date
<b>Count= 2</b>						
3	Kevin and Karl Issue Test	Jacques Goupil	(3) Closed	(2) Medium	(2) Category2	1/1/2015 12:00 AM
4	New Issue	Jacques Goupil	(1) Active	(2) Medium	(2) Category2	



# Team Collaboration and Doc Management

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



The screenshot displays the PPM Works interface, which is divided into several sections:

- Project Site (Left):** Shows a Gantt chart for a project named 'Requirements' starting on 11/2 and ending on 12/16. Below the chart is a task list table.
- Documents Panel (Middle):** Features a navigation menu with options like Home, Notebook, Documents (selected), Tasks, Calendar, Projects, Project Details, Recent, Deliverables, and Risks. It also includes a search bar and a list of document types such as Name, Specification, Business Driver, MSFT District Map, and Project Server Report Samples.
- Project Summary (Right):** Provides an overview of the project's status, including a 'Project Summary' section with a '11 late' indicator and a 'Newsfeed' section with recent updates from Jacques Goupil.
- Documents List (Bottom Right):** A secondary list of documents with options to New, Upload, and Share.

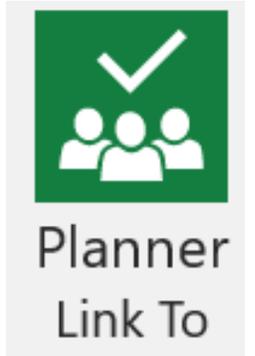
ID	Mode	Task Name	Duration
1	Requirements	Requirements	11/2 - 12/16
2	Document Design	Document Design	25d
3	Review and Appro	Review and Appro	20d
4	Design Complete	Design Complete	5d
5	Review and Appro	Review and Appro	5d
6	Design Complete	Design Complete	0d

# 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**.

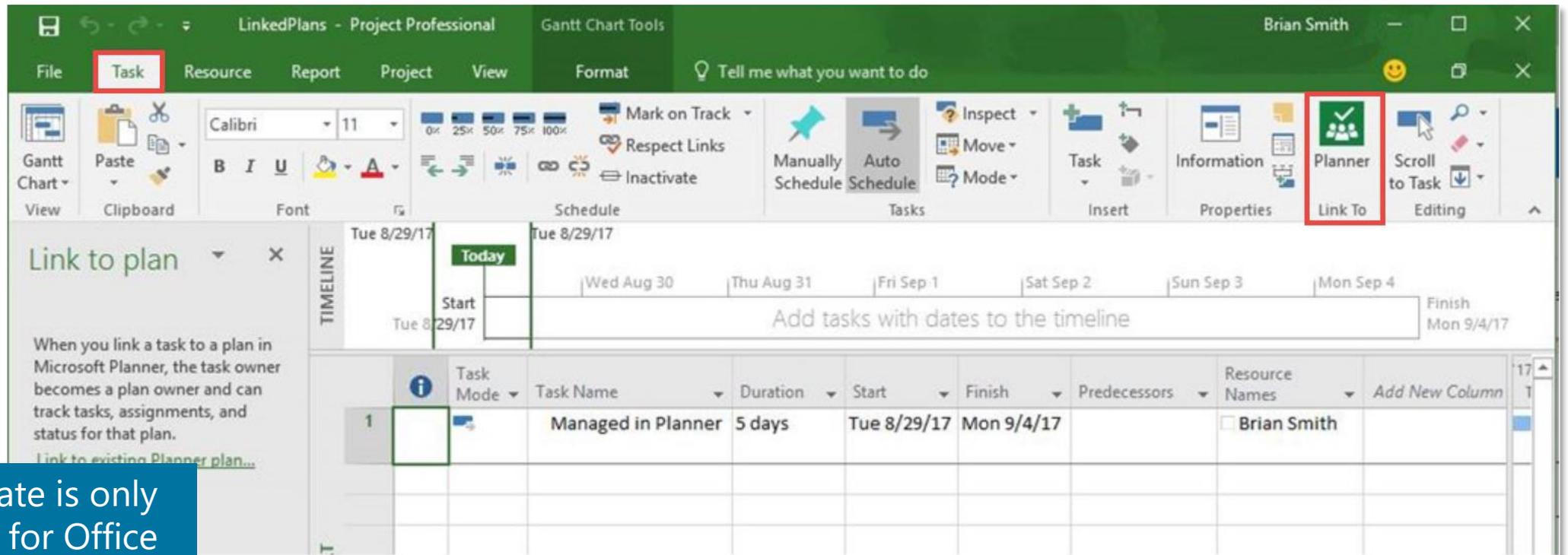


## Summary:

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

# Linking Plans to a Project Task

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

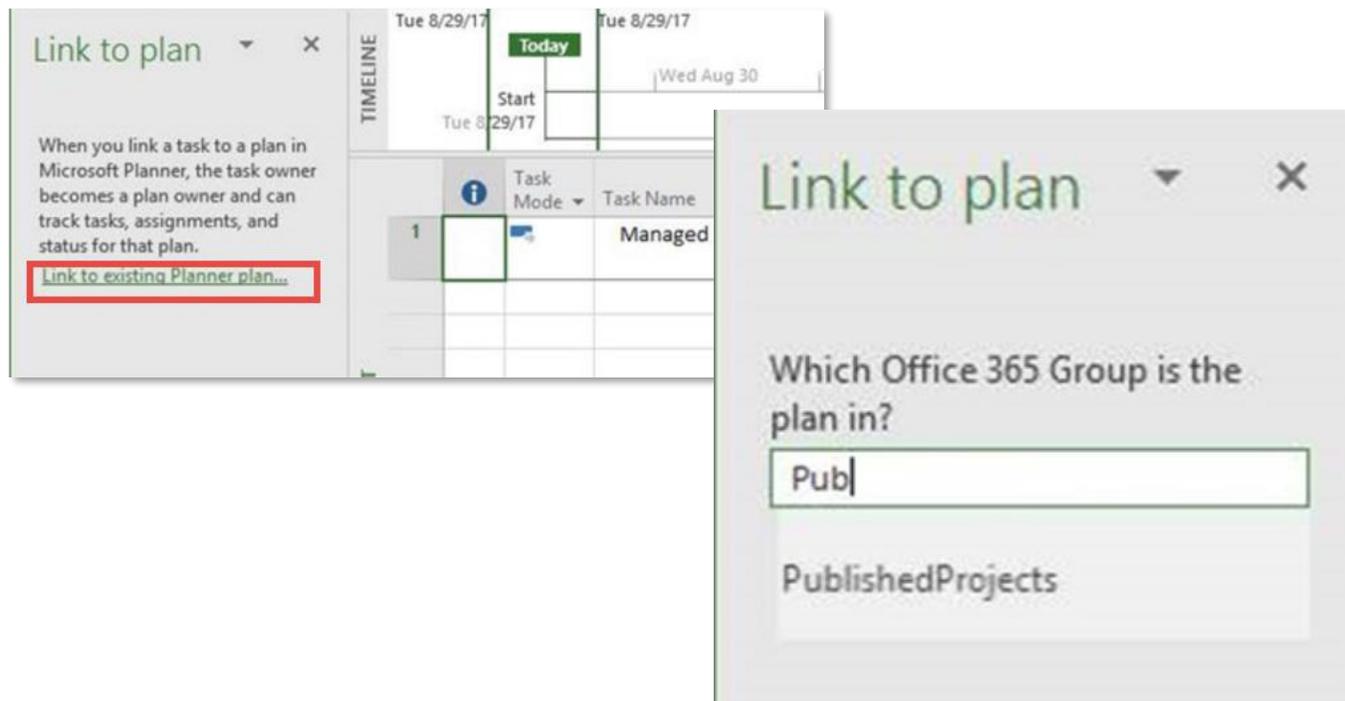


This update is only available for Office 365 subscriptions.

# 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.



## Planner and Project Demo

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

Project Online Demo

# 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

# 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

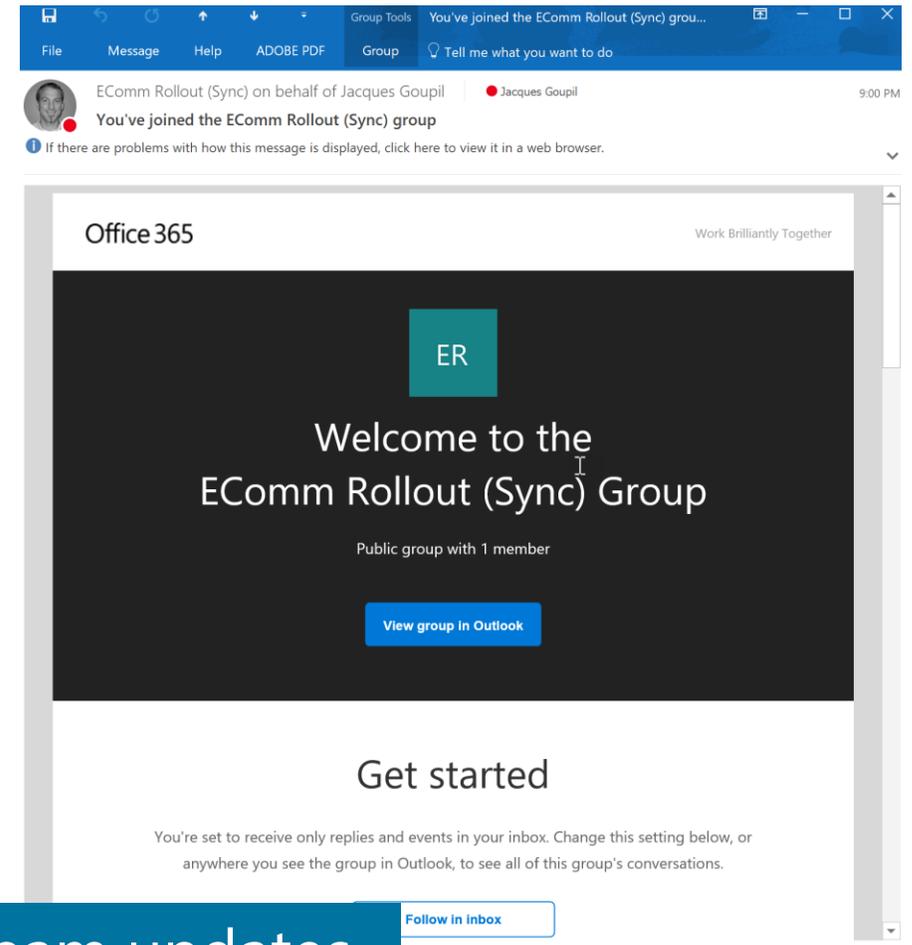
# Integration from Project Online to Planner

## 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



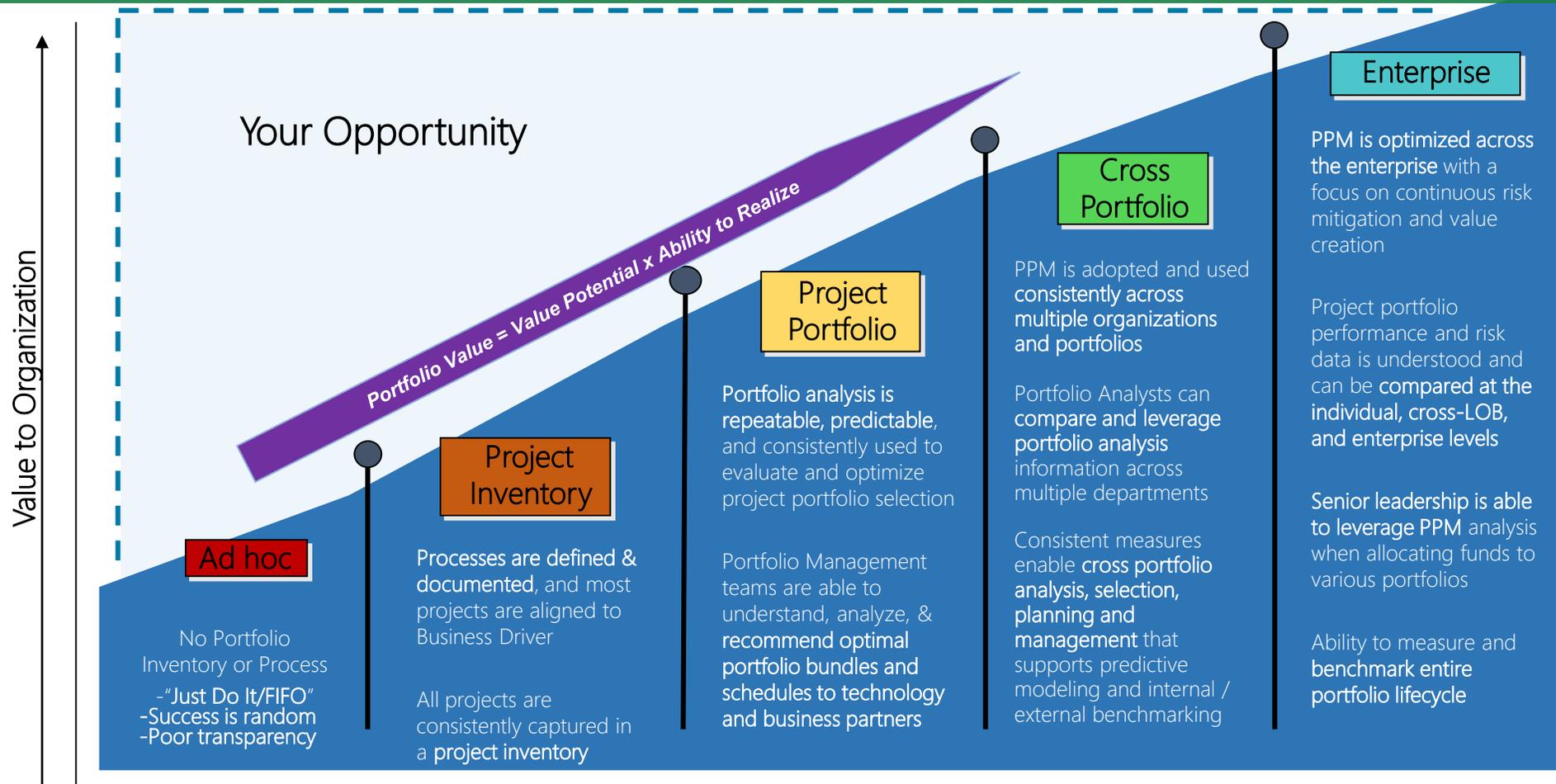
## Planner and Project Demo

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

Project Online Demo

# Roadmap to PPM Maturity

Across the Organization



Basic

Stages of Excellence

World-Class



Crawl



Walk



Run



Well-oiled Machine



PPM Works

# 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	+	+
<b>Task-level discussion and collaboration</b>	+	-
<b>Included in Office365 Suite (no additional license cost)</b>	+	-

# Feature Comparison

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

# Quick Poll

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



# 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](#)

# Upcoming PPM Works schedule



**Register at:**

**<http://ppmworks.com/events/>**



**PPM Works**

## Events/webinars:

- 1/25 – Best Practices for Project Site Template Development
- 1/30 - PPM Summit (Minneapolis) 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

Hope to see you there!

# Upcoming PPM Works Events

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

[www.ppmworks.com/events](http://www.ppmworks.com/events)

Hope to see you there!





LinkedIn: [www.linkedin.com/in/jacquesgoupil/](http://www.linkedin.com/in/jacquesgoupil/) and  
<https://www.linkedin.com/company/ppm-works-inc>

Our Site: [www.ppmworks.com](http://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](mailto:info@ppmworks.com)**
- Request PDUs
- Check out upcoming events, blogs, and webcasts
- Get LinkedIn with me (Jacques Goupil)
- Ask questions and use the tool!



# 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 1<sup>st</sup>
- 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

# Contact Us

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

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**Web: [www.ppmworks.com](http://www.ppmworks.com)**

# Q & A and PDU's for this Webinar



PPM Works is a PMI® Registered Education Provider (R.E.P.). We do offer PDU's for this webinar. To claim your PDU please email [info@ppmworks.com](mailto:info@ppmworks.com) with your PMI number and reference this webinar.

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