



**Microsoft Partner**  
Gold Project and Portfolio Management  
Silver Collaboration and Content  
Silver Business Intelligence

# Microsoft PPM New Features: The Future is Here

Presented by: Jacques Goupil

11/07/2017

# Jacques Goupil, PMP, MCTS, MCP



## Managing Partner

Jacques.Goupil@ppmworks.com

[www.linkedin.com/in/JacquesGoupil](http://www.linkedin.com/in/JacquesGoupil)

- Microsoft Community Leader Award 2012-2016
- PDD Instructor and Speaker at PMI® MN 2010-2016 Conference, Project Summit 2013 - 2016, and Microsoft Project Conference 2012 - 2014
- 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 2010/2013 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.

# November Demo Series

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

## **Resource and Capacity Planning**

November 14<sup>th</sup> @ 1:00 pm – 2:00 pm EDT

Who's doing what when and are they over booked? This is an all too common question that Project Online can help you see your utilization and plan resources based on capacity management benefits. Manage resource forecast (both top-down and bottoms-up planning) and understand the resource utilization calculations. We will cover the approving engagements, capacity heatmap, and reviewing committed resources. Hope aboard this resource train.

## **Portfolio Management Made Easy**

November 21<sup>st</sup> @ 1:00 pm – 2:00 pm EDT

Is your organization running the correct portfolio of projects? What value are your projects producing for your organization? Which projects give you the most value? We will cover the benefits and challenges of portfolio/demand management, project selection, scenario-based analysis, and cost vs resource constraints. Come learn the Portfolio Management benefits of Project Online and walk away with your own plan to get you where you need to be.

## **Create Your Own Portfolio Dashboard**

November 28<sup>th</sup> @ 1:00 pm – 2:00 pm EDT

If you ever wanted to learn about Power BI then this is the webinar for you. Join the experts at PPM Works and together we will dive into how to bring your data to life by building real-time dashboards and reports. You will walk away from this session with all the necessary knowledge of the Power BI business analytics tools. You will be able to analyze data and share valuable insights. Regardless of your experience level this workshop will have something for you.

# Upcoming Webinars

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

## **Creating Custom Dashboards in Project Professional 2016**

December 7<sup>th</sup> @ 12 - 1 PM EST

Learn how to create custom dashboards and reports in Project Pro 2016, while also learning how to prepare and optimize the project plan to maximize the report outputs. This webinar will focus on editing existing reports, creating new custom reports and dashboards and understanding how to interpret the data. You will also learn how to leverage the Organizer to share reports with all of your team members.

## **Create Custom Tables and Views in Project Professional**

January 11<sup>th</sup> @ 12 - 1 PM EST

Did you know there are eleven new filters in Project Professional 2013 and 2016? Join PPM Works experts as we show you how to create custom tables and views in Project Professional and utilize the new filters to quickly optimize Project views. You will learn how to leverage the Organizer to copy table and views to other projects or share them with others on your team.

## **Best Practices for SharePoint Project Site Template Development**

January 25<sup>th</sup> @ 12 - 1 PM EST

We will show you how to advance project collaboration within your organization by expanding upon the standard Project Online/OnPrem SharePoint Project Site Template. Learn all the Best Practices of using SharePoint in your company from the experts at PPM Works.

# Learning Objective

Understanding the latest capabilities with Project Online:

- Microsoft Project Agile
- Planner to Project Integration
- The next wave of Project Online Power BI Dashboards.
- New Teams approach for collaboration, task management, and more.



# Call to Action

1. **Get started today and contact us** at [info@ppmworks.com](mailto:info@ppmworks.com)
2. **New Features Discovery Session**
  - Covering Topics of your choice: Project Agile, Power BI Dashboards, Planner and Project, Teams, Office365 Business Productivity and Staffing Hub (*just announced*)

Let the experts help you understand how and if you should leverage these new capabilities and how they work with your current solution

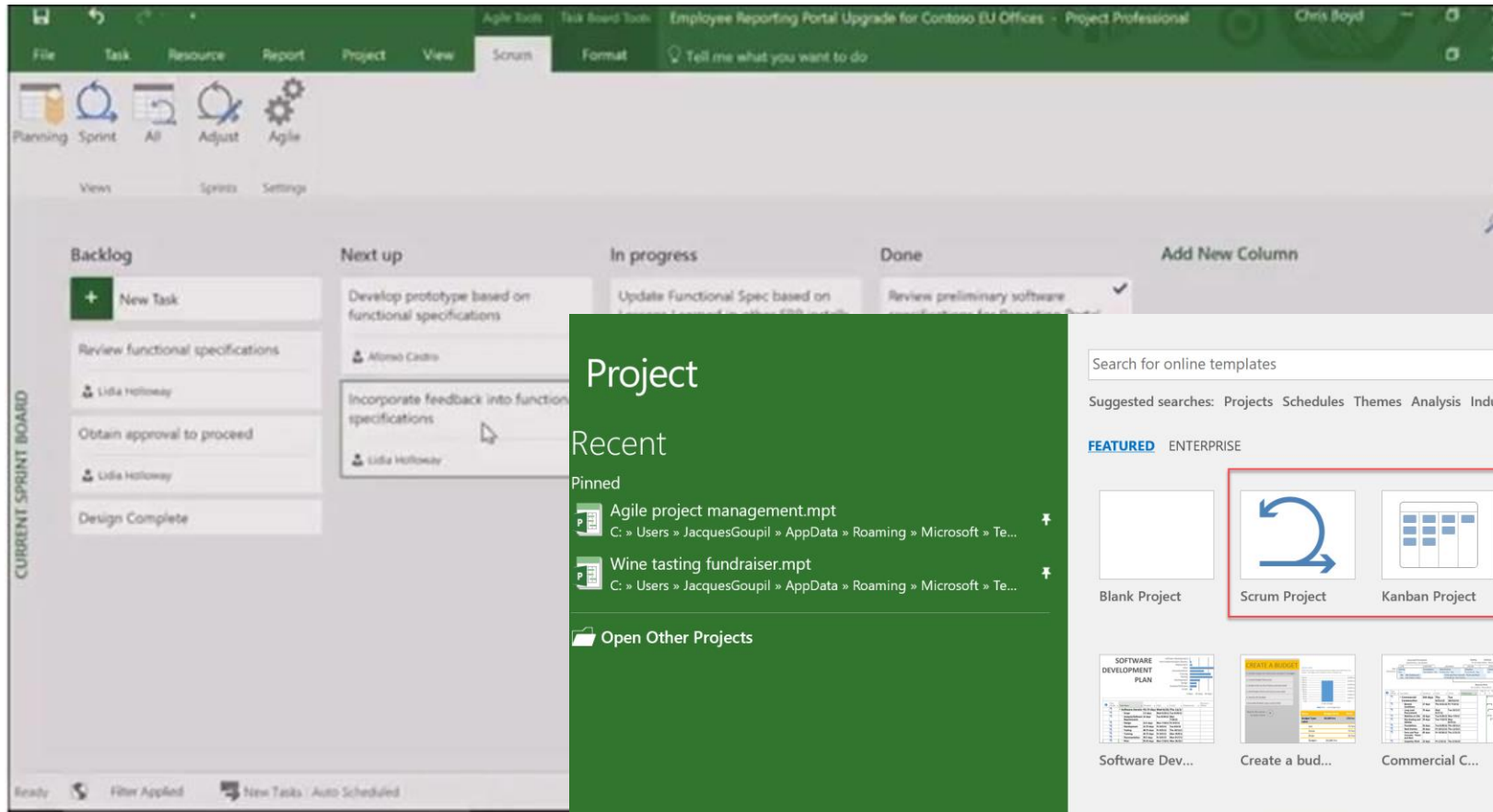
Set up your Discover Session today ... [info@ppmworks.com](mailto:info@ppmworks.com)

3. **Register your PDUs**

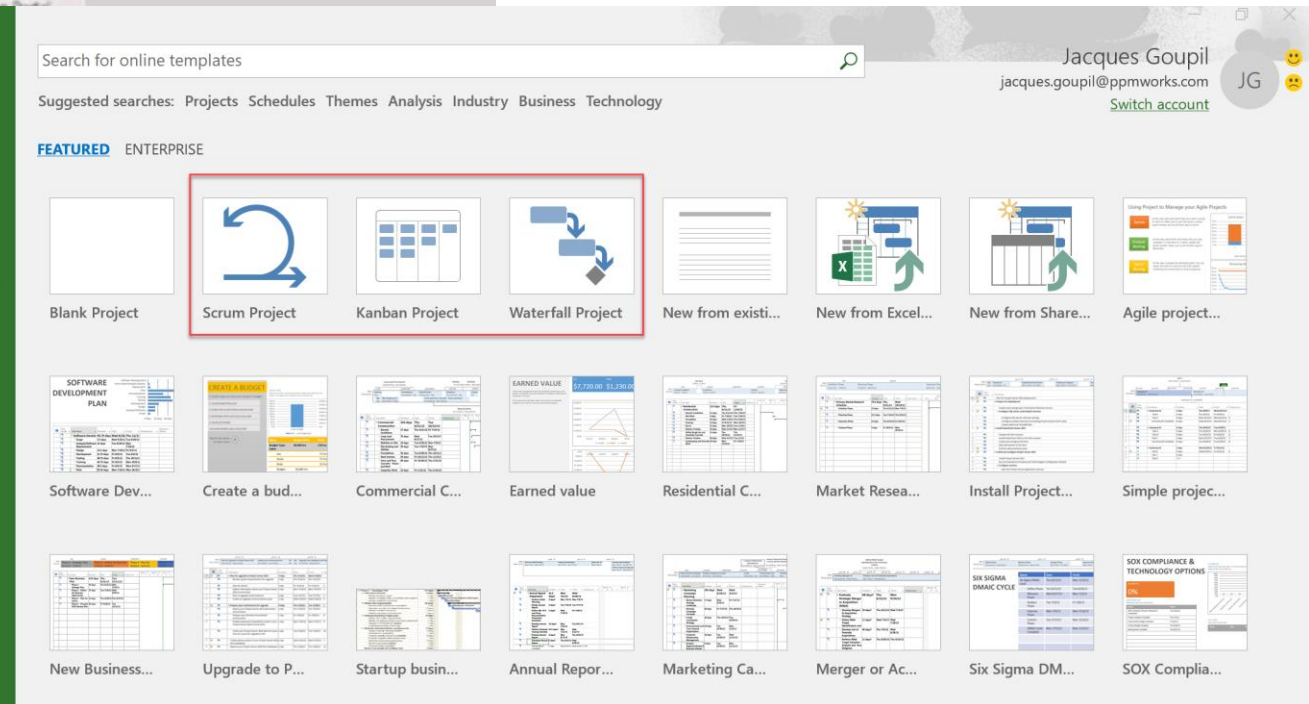
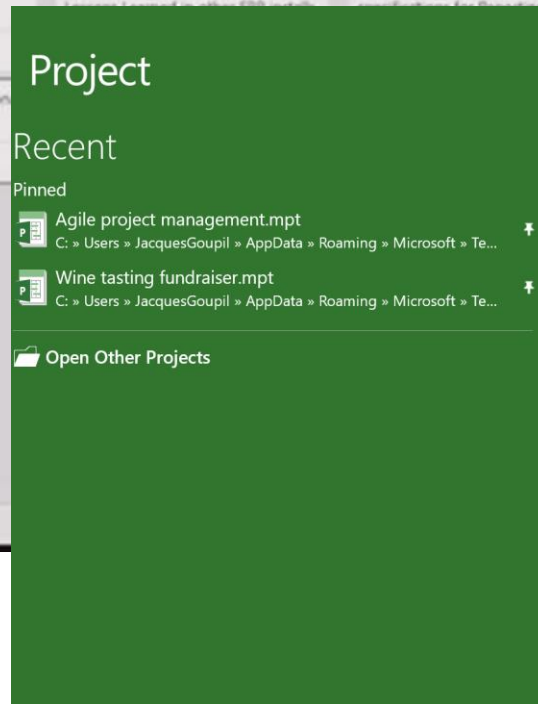
# Project Online Benefits

1. **Performance Improvements Over Project Server**
2. **New Online Features:** Portfolio Management Dashboards, Resource Engagements, Multiple Timelines, Capacity Planning with visual heat maps, Managing Project via the web
3. **Online Features Coming Soon:** Agile Projects, Microsoft Planner and Project Integration, Power BI Dashboard (new in Fall 2017)
4. **Infrastructure Consolidation:** Save physical server cost - eliminate need for internal IT support/upgrade/maintenance
5. **Evergreen:** Always have the latest version – benefit from millions of users
6. **License Management:** Easy cloud licenses
7. **User Adoption/Scalability:** Scale – no size restrictions or performance concerns

# Agile, Waterfall, and Hybrid Projects



## Microsoft Project Agile





# Planner to Project Integration

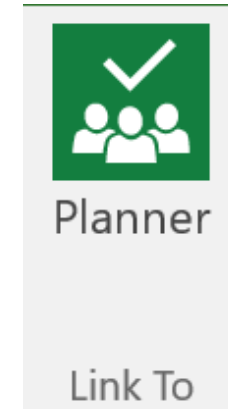
Link to plan

When you link a task to a plan in Microsoft Planner, the task owner becomes a plan owner and can track tasks, assignments, and status for that plan.

[Link to existing Planner plan...](#)

Task Mode	Task Name	Duration	Agile	Start	Finish
1	Create Demo Environment	0 days?	Yes	Tue 11/7/17	Tue 11/7/17
2	Report Build	1 day?	Yes	Tue 11/7/17	Tue 11/7/17
3	Training	4 days	Yes	Tue 11/7/17	Fri 11/10/17
4	Session #1	2 days	Yes	Tue 11/7/17	Wed 11/8/17
5	Session #2	2 days	Yes	Thu 11/9/17	Fri 11/10/17
6	Marketing Activities	30 days	Yes	Tue 11/7/17	Wed 12/20/17
7	Website Form	1 day?	Yes	Tue 11/7/17	Tue 11/7/17

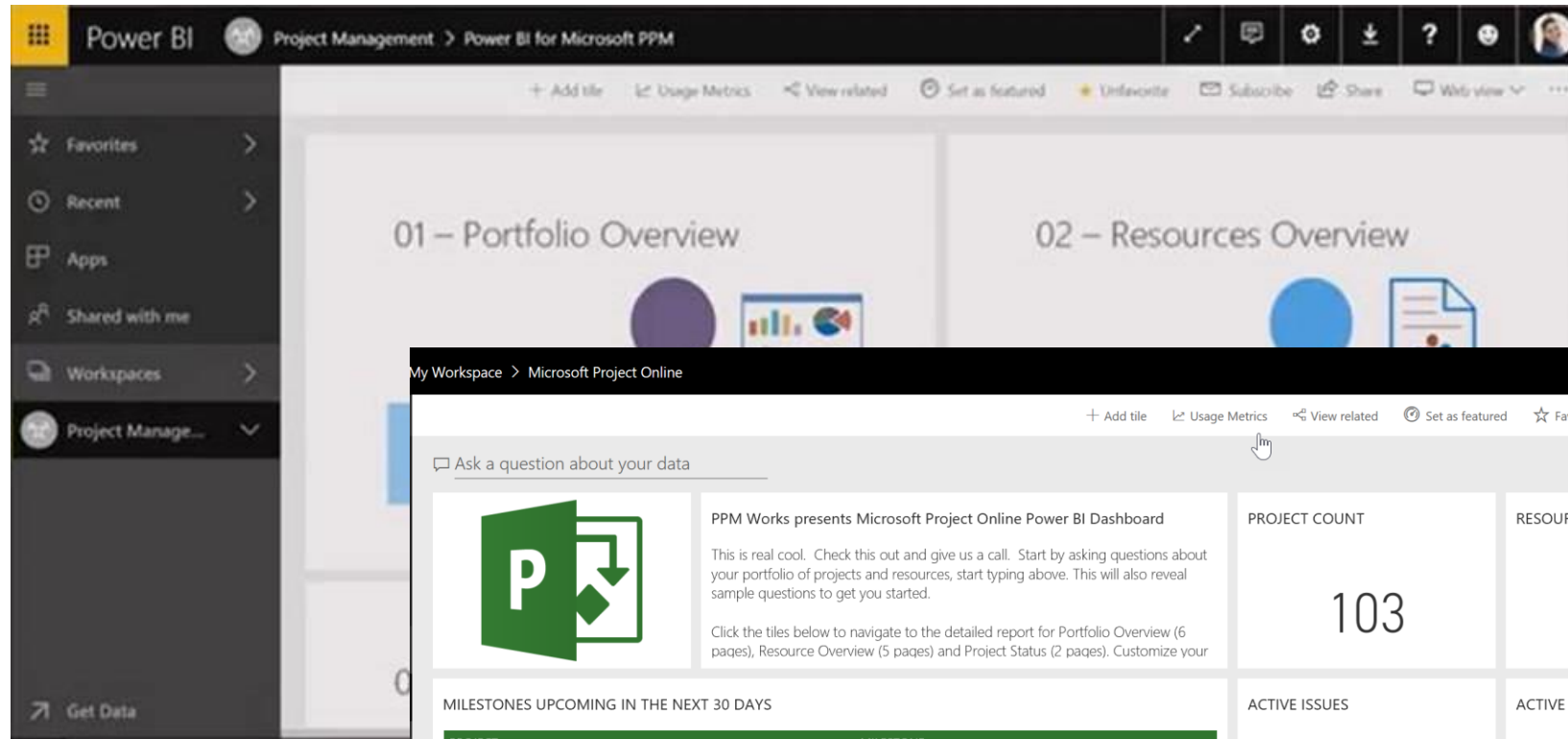
Ready New Tasks : Auto Scheduled Publish completed successfully



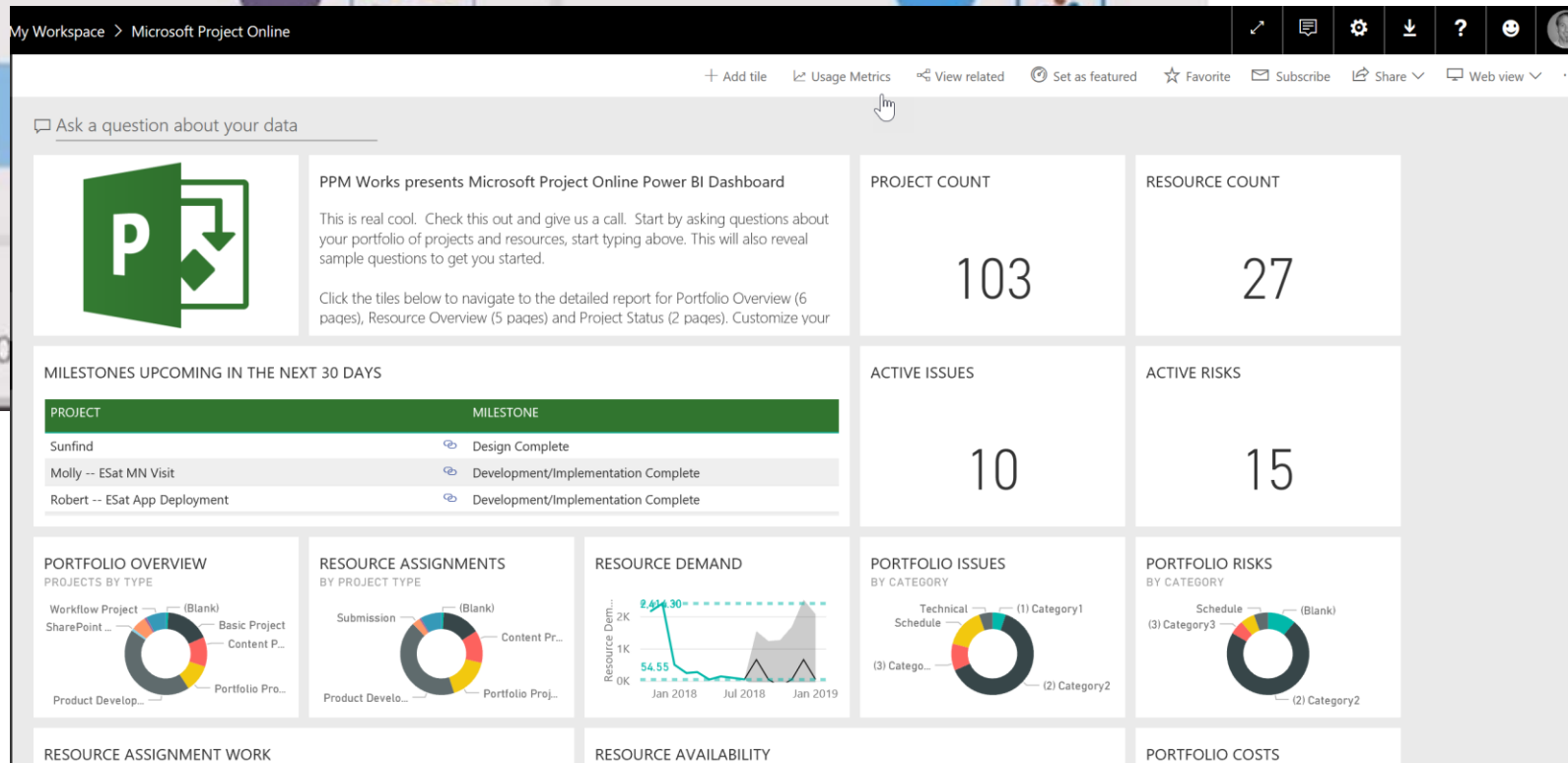
Project Task to Planner Plan  
Task Owner becomes the Plan Owner  
Track

- 1) Tasks
- 2) Assignments
- 3) Status

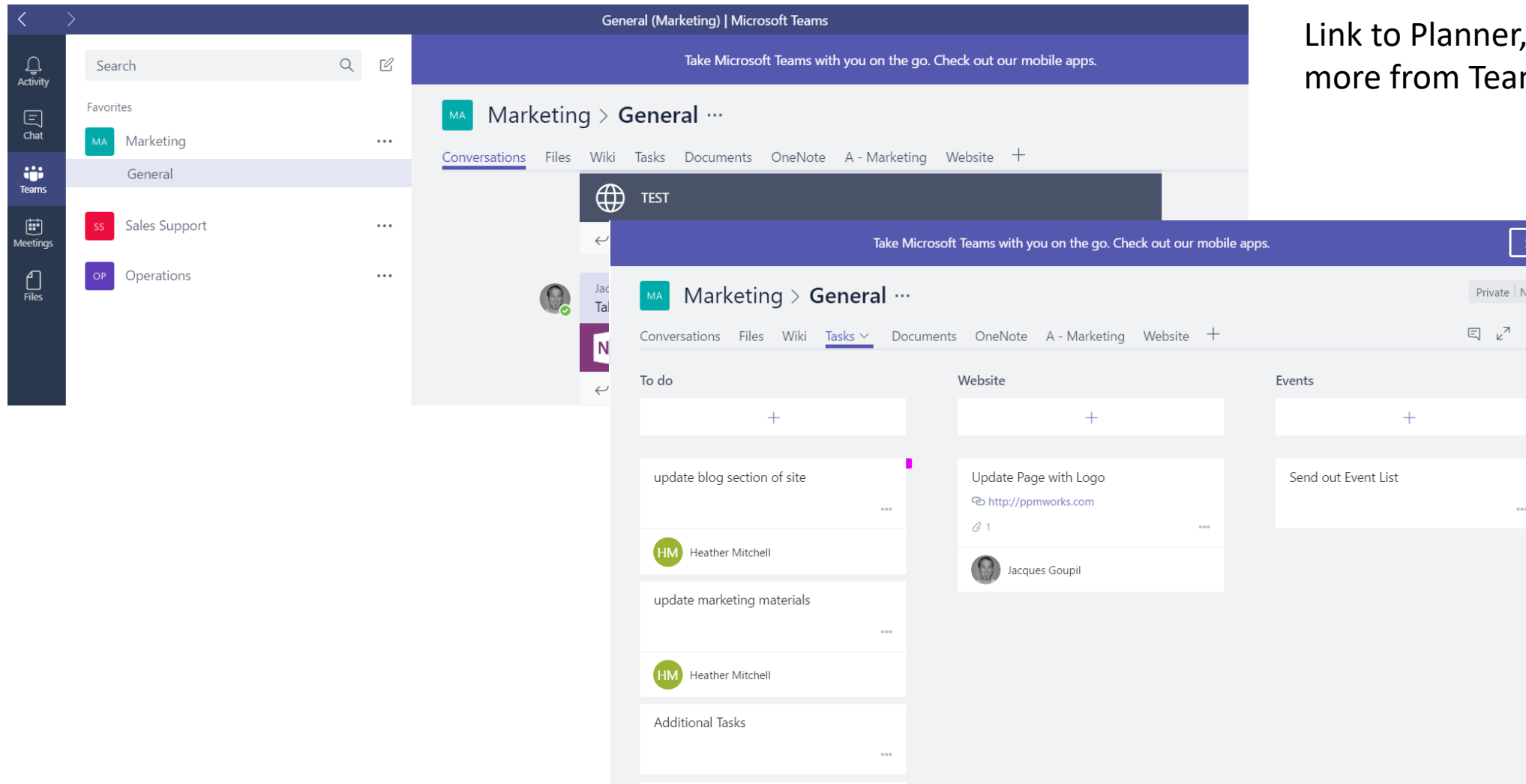
# New Project Online Power BI Dashboard



Power BI Dashboard



# Teams (Planner, OneNote and More)



The screenshot displays the Microsoft Teams interface for a 'Marketing' team. The left sidebar shows the 'General' channel selected. The main area shows the 'Tasks' tab, which lists tasks assigned to team members. The tasks are:

- update blog section of site (assigned to Heather Mitchell)
- update marketing materials (assigned to Heather Mitchell)
- Additional Tasks

The 'Website' tab is also visible, showing a task 'Update Page with Logo' with a link to <http://ppmworks.com> assigned to Jacques Goupil. The 'Events' tab is also visible, showing a task 'Send out Event List'.

Link to Planner, OneNote and more from Teams



## New Microsoft PPM Features (November 2017)

- Project Agile
- Project to Planner
- Power BI Dashboard
- Teams

**Project Online Demo**

# Call to Action

1. **Get started today and contact us** at [info@ppmworks.com](mailto:info@ppmworks.com)
2. **New Features Discovery Session**
  - Covering Topics of your choice: Project Agile, Power BI Dashboards, Planner and Project, Teams, Office365 Business Productivity and Staffing Hub (*just announced*)

Let the experts help you understand how and if you should leverage these new capabilities and how they work with your current solution

Set up your Discover Session today ... [info@ppmworks.com](mailto:info@ppmworks.com)

3. **Register your PDUs**



# November Demo Series

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

## **Resource and Capacity Planning**

November 14<sup>th</sup> @ 1:00 pm – 2:00 pm EDT

Who's doing what when and are they over booked? This is an all too common question that Project Online can help you see your utilization and plan resources based on capacity management benefits. Manage resource forecast (both top-down and bottoms-up planning) and understand the resource utilization calculations. We will cover the approving engagements, capacity heatmap, and reviewing committed resources. Hope aboard this resource train.

## **Portfolio Management Made Easy**

November 21<sup>st</sup> @ 1:00 pm – 2:00 pm EDT

Is your organization running the correct portfolio of projects? What value are your projects producing for your organization? Which projects give you the most value? We will cover the benefits and challenges of portfolio/demand management, project selection, scenario-based analysis, and cost vs resource constraints. Come learn the Portfolio Management benefits of Project Online and walk away with your own plan to get you where you need to be.

## **Create Your Own Portfolio Dashboard**

November 28<sup>th</sup> @ 1:00 pm – 2:00 pm EDT

If you ever wanted to learn about Power BI then this is the webinar for you. Join the experts at PPM Works and together we will dive into how to bring your data to life by building real-time dashboards and reports. You will walk away from this session with all the necessary knowledge of the Power BI business analytics tools. You will be able to analyze data and share valuable insights. Regardless of your experience level this workshop will have something for you.

# Upcoming Webinars

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

## **Creating Custom Dashboards in Project Professional 2016**

December 7<sup>th</sup> @ 12 - 1 PM EST

Learn how to create custom dashboards and reports in Project Pro 2016, while also learning how to prepare and optimize the project plan to maximize the report outputs. This webinar will focus on editing existing reports, creating new custom reports and dashboards and understanding how to interpret the data. You will also learn how to leverage the Organizer to share reports with all of your team members.

## **Create Custom Tables and Views in Project Professional**

January 11<sup>th</sup> @ 12 - 1 PM EST

Did you know there are eleven new filters in Project Professional 2013 and 2016? Join PPM Works experts as we show you how to create custom tables and views in Project Professional and utilize the new filters to quickly optimize Project views. You will learn how to leverage the Organizer to copy table and views to other projects or share them with others on your team.

## **Best Practices for SharePoint Project Site Template Development**

January 25<sup>th</sup> @ 12 - 1 PM EST

We will show you how to advance project collaboration within your organization by expanding upon the standard Project Online/OnPrem SharePoint Project Site Template. Learn all the Best Practices of using SharePoint in your company from the experts at PPM Works.

# Question and Answer



# Contact Us

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

**Address:** 30 Newbury Street, Boston, MA 02116

**Phone:** 888-858-3060

**Email:** [info@ppmworks.com](mailto:info@ppmworks.com)

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

# PDU's for this Webinar

PPM Works is a PMI® Registered Education Provider (R.E.P.). We offer PDU's for this presentation.

To claim your PDU please email **info@ppmworks.com** with your PMI number and reference this presentation.