

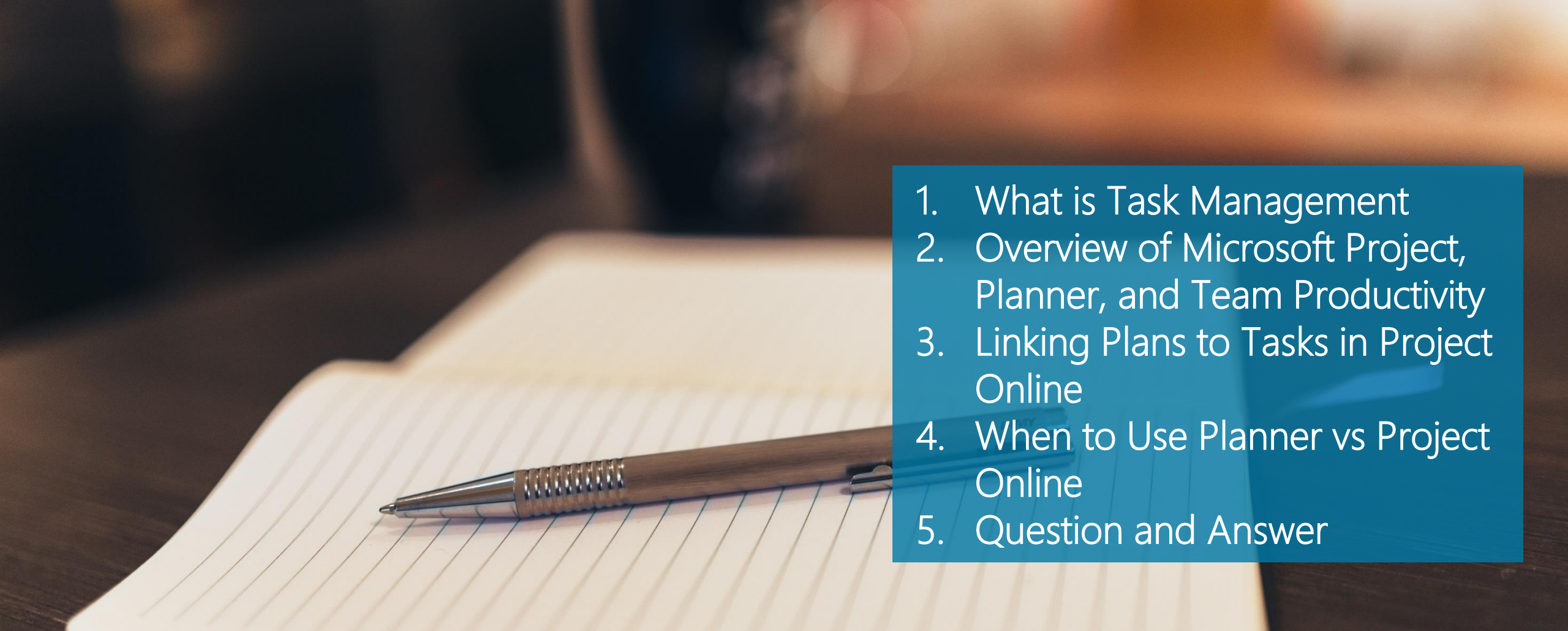


# Task Management at its Simplest: Project Online and Planner the Best of Both Worlds

Presented by Jacques Goupil

September 14, 2017



- 
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

# 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. Project Planner and Project Online overview – task/work management
3. Integrate Planner with tasks in Project Online
4. Get started using Planner (assigning tasks, track progress, and communicating with your team)
5. Determine when to use Planner and when to use Project Online

# 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 2012-2017, Project Summit 2013-2017, Microsoft Project Conference 2012/2014, Project Virtual Conf 2015
- 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 2010/2013/2016 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 Events

Event	Date
PMI® Mass Bay PDD 2017	September 22-23
Microsoft Ignite	September 25-29
PMI® Minnesota PDD 2017	September 25-28
<b>PPM Works Webinar:</b> Microsoft's Complete Work Management Solution	September 28 12 PM
Boston PPM Community Meeting	October 4 5:30-7:30 PM
<b>PPM Works Webinar:</b> The Scheduling Formula	October 10 12 PM
Project Summit Business Analyst World Boston	October 16-19
Dashboard in a Day Workshop	October 26 8-9:30 AM

Hope to see you there

# Session Goals

Understanding the  
Microsoft Work  
Management Solutions

Tips and Tricks for  
both New or Mature  
Organizations

Equip You to Get  
Started Today

Quick Reference on  
Steps to Get Started

Make the Most of Your  
Time

Fast-pace,  
Condensed Content

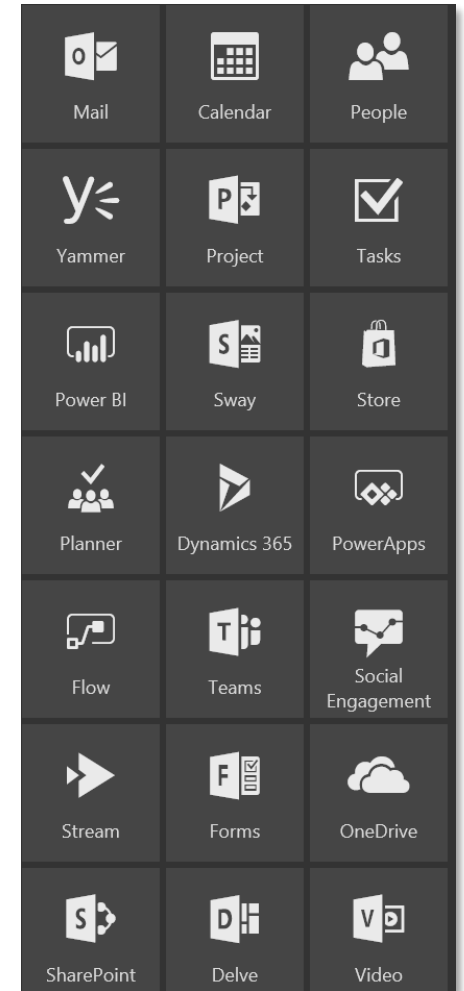
Use Chat for questions  
Time for Question and Answer

# Questions for You

What tools is your organization using today to facilitate collaboration and manage effort? (O365, Shared Drives, Yammer, etc)

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?





# What are you Managing?

**Task management** is the process of managing a task through its **life cycle**. Task management is performed by the individual assigned to the task and does not involve others but is still important to the company.

**Work management** is a set of software products and services that apply workflow structure to the **movement of information** as well as to the interaction of business processes and human worker processes that **generate the information**.

**Project management** is the **discipline** of initiating, planning, executing, controlling, and closing the work of a team to **achieve specific goals** and **meet specific success criteria**.

**Project Portfolio Management** (PPM) is the centralized **management** of the processes, methods, and technologies used by **project** managers and **project management** offices (PMOs) to analyze and collectively manage current or proposed **projects** based on numerous key characteristics.



# 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



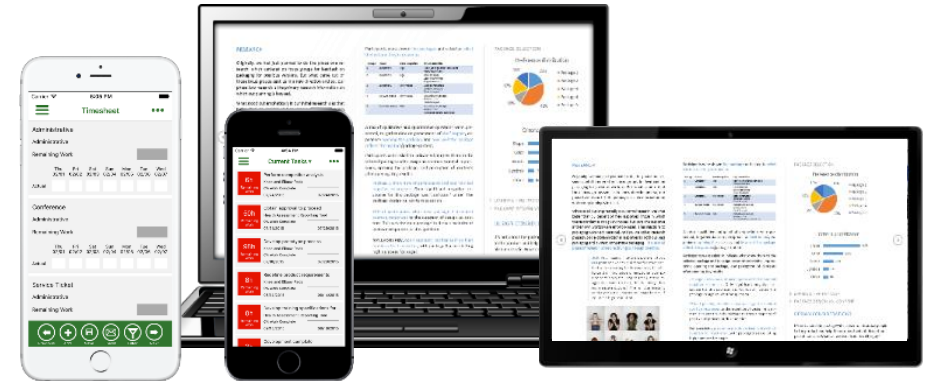
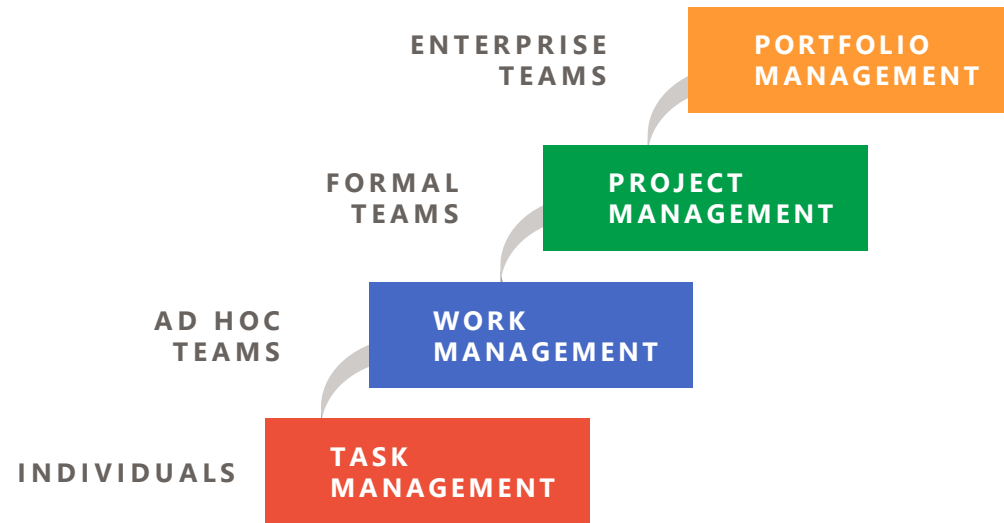
Structured resources for large groups of people that are focused on a common goal or area of the company

## 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

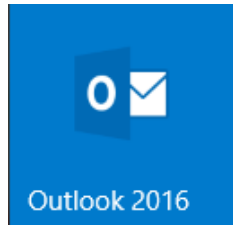
Flexible  
Reporting  
& Analytics

Integrated solutions for individuals, teams and major programs

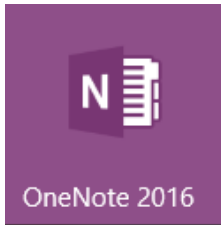
# MICROSOFT'S PLANNING AND TEAM PRODUCTIVITY TOOLS

## INDIVIDUALS

### TASK MANAGEMENT



Outlook 2016



OneNote 2016

### Groups & Teams



To-Do  
Wunderlist

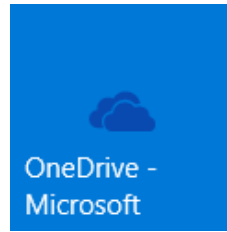
## AD HOC TEAMS

### WORK MANAGEMENT

Office Suite



Sharepoint Online



OneDrive -  
Microsoft



Planner

Office 365 Planner

## FORMAL TEAMS

### PROJECT TEAM MANAGEMENT



Formal project and  
programs delivery

### Project Online

- PM and local teams

## ENTERPRISE

### PORTFOLIO MANAGEMENT



Enterprise Capacity  
Management

### Project Online (PPM)

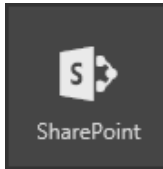
- Premium
- Professional
- Essentials

# Project Online and Planner

## AD HOC TEAMS

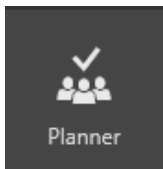
### WORK MANAGEMENT

#### SharePoint



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

#### Planner

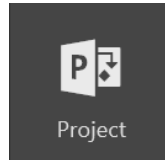


An Office 365 App to create a team, build a plan, assign tasks and check progress. **Planner** is about simplicity & ease of ramp up and use.

## FORMAL TEAMS

### PROJECT MANAGEMENT

#### Project Online

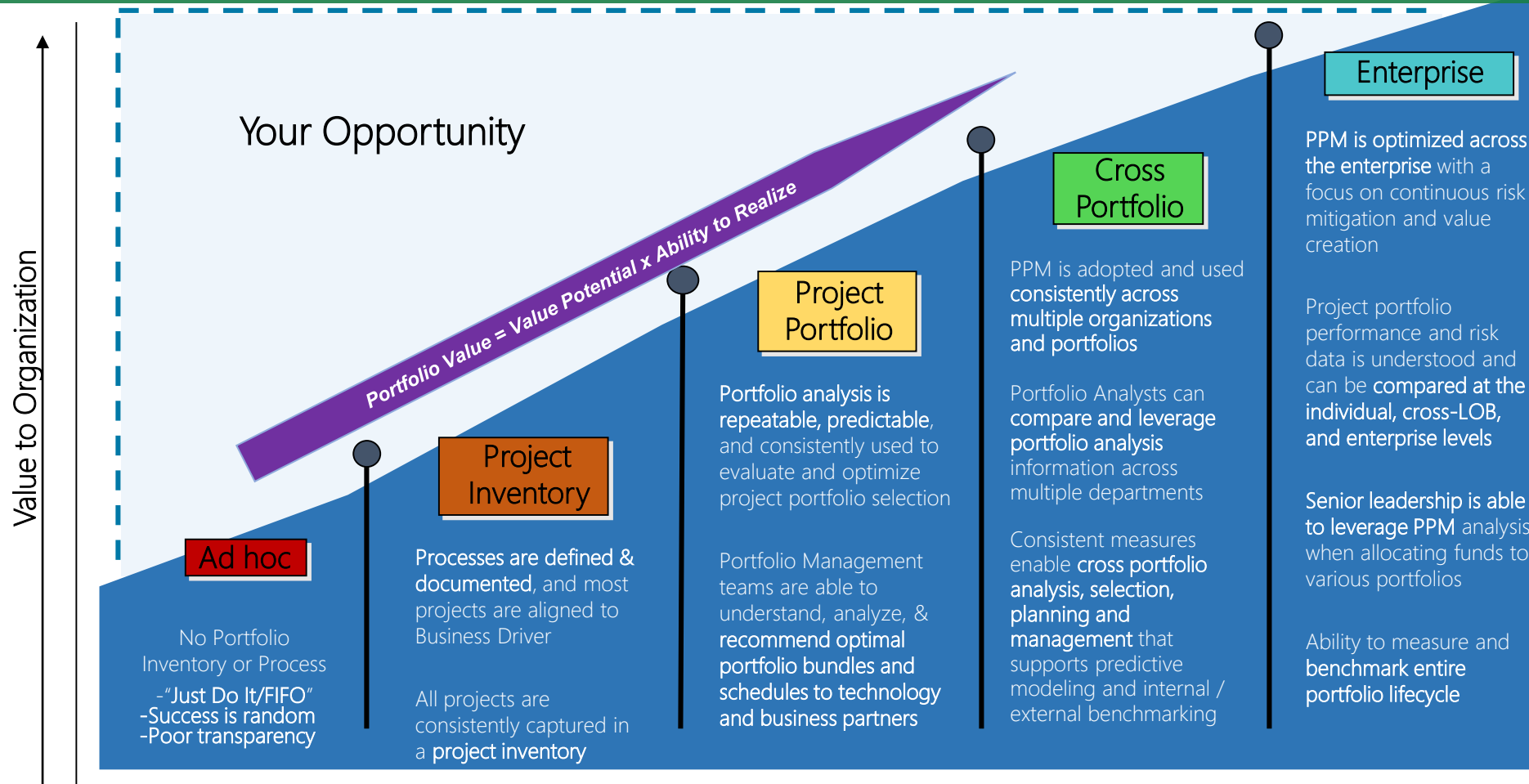


Plan, Manage  
Execute

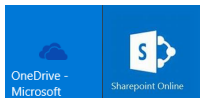
A scalable solution for schedule, resource, cost and time management. Templates, wizards and real-time reporting improve controls, while team sites, notifications and apps guide team members to deliver better results. **Designed for advanced and formal project management approach** and allows for Adhoc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

# Roadmap to PPM Maturity

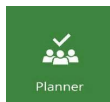
Across the Organization



Basic ————— Stages of Excellence —————> World-Class



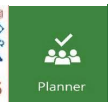
Crawl



Walk



Run



Well-oiled Machine



PPM Works



# 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 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.	X	X
I want a simplified visual that displays who is doing what and what progress has been made.	X	X

# Best of Both Worlds

- Tool integration allows for using both Planner and Project Online
- Manage smaller efforts and brainstorming using Planner
- Reduce granularity on project schedules using Planner to link smaller action items tracked in plans to tasks in projects

# 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.

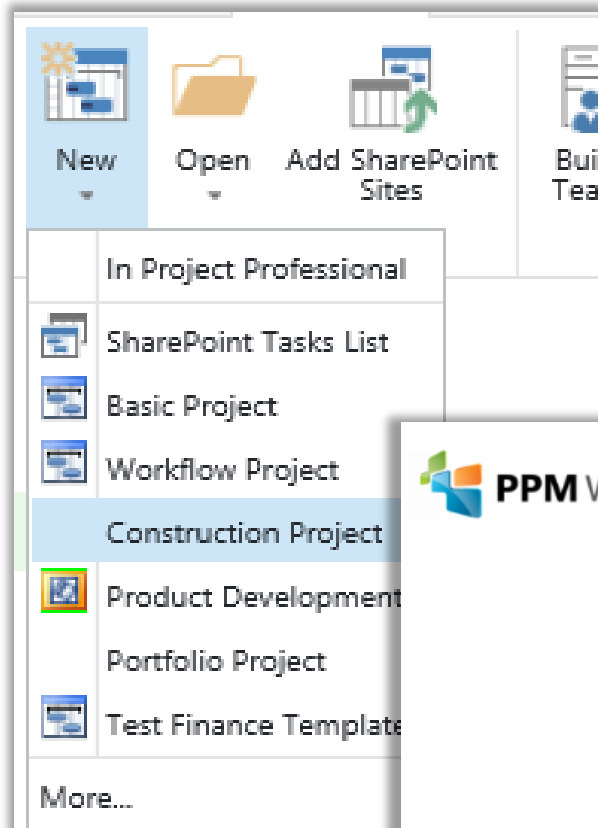
# Use Case Scenario #2

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. Diane has her PMP designation and has prior experience using Microsoft Project Standard. She would like to replace her daily phone calls and emails with Team Members.

# Task Management

Project Creation, Task Updates, and Document Approval Workflow

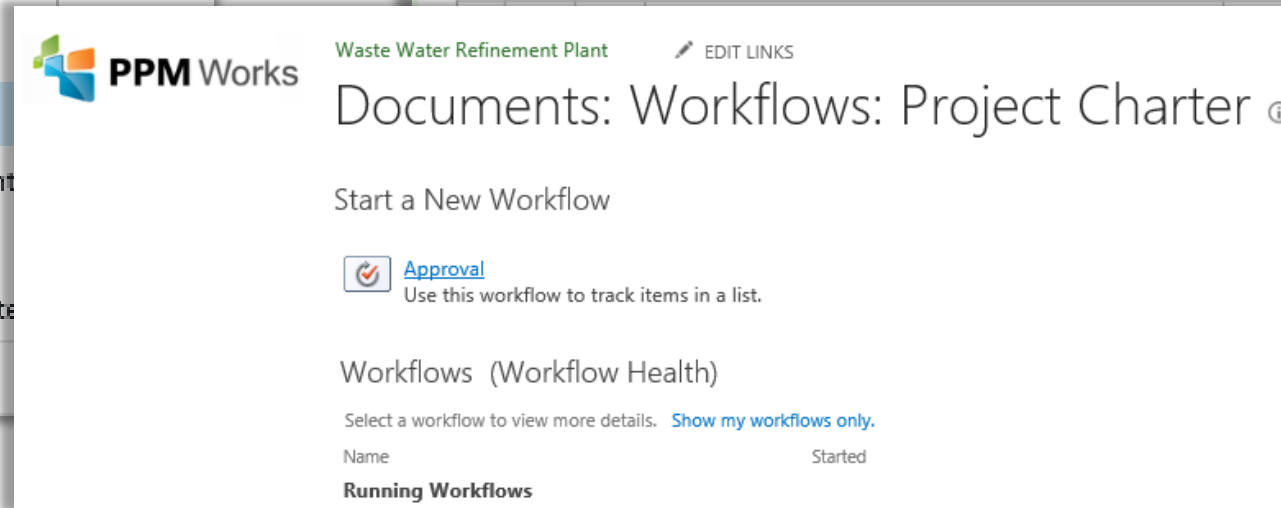
Leveraging out of the box Project Creation and tracking/approval capabilities



PPM Works PWA Demo

## Tasks

		Task Name	Start ↑	Finish	Remainir	Period Total	Sun 11/8	Mon 1
		Planning Window: In Progress for Current Period	10/29/2015	11/30/2015	220h			
		Project Name: Building furniture Installation	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	0h
		Project Name: Waste Water Refinement Plant	11/9/2015	11/30/2015	100h			
			2015	11/30/2015	100h	0h		0h
			11/2015	12/9/2015	96h			
			11/2015	12/9/2015	96h			
			12/2015	12/9/2015	96h			
			2015	4/1/2016	580h			
			11/2015	12/16/2015	40h			
			12/2015	12/16/2015	40h			
			2015	4/1/2016	540h			
			2015	12/7/2015	20			
			12/2015	4/1/2016	5			

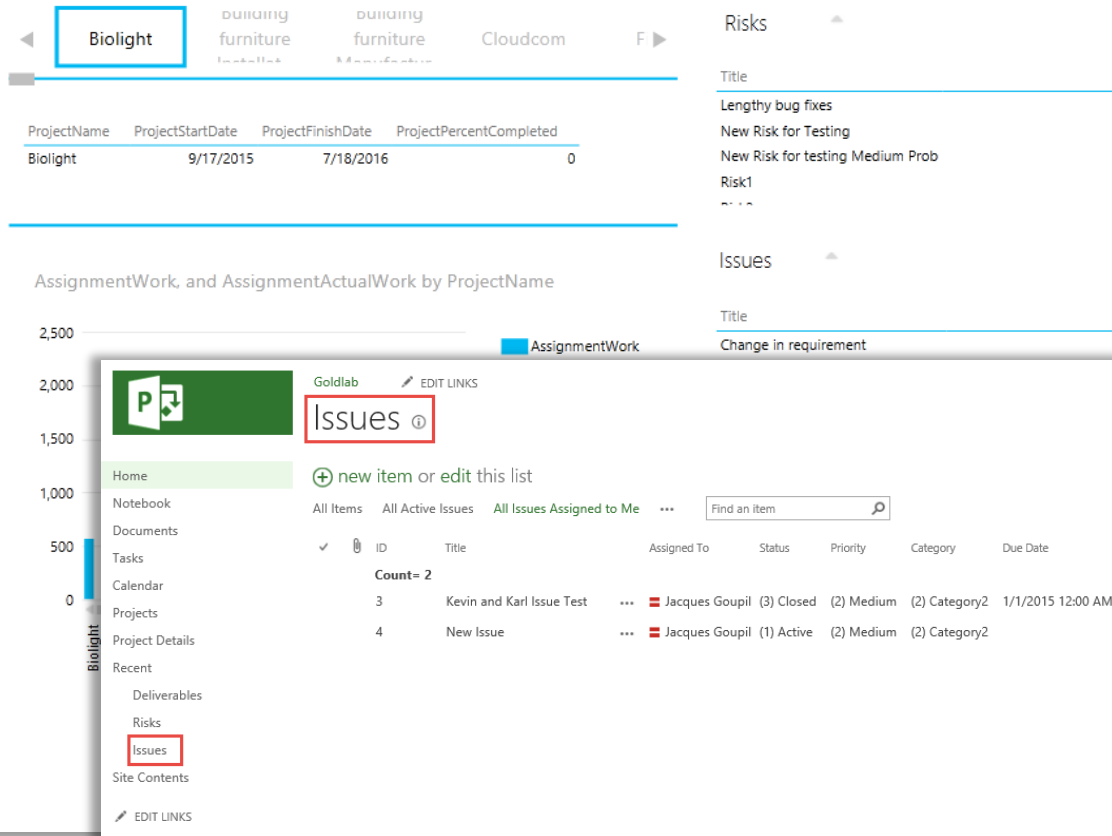




# Risk / Issue Management

Flexible Reporting including Excel, Power BI, Dash boarding

## Project Overview Dashboard



## Project Server Plus Risk Matrix



# Team Collaboration and Doc Management

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

**Status:** Checked-out to you since 11/11/2015

Today

Start 11/2

Requirements 11/2 - 12/16

	ID ↑	Mode	Task Name
	1		Requirements
	2		Document Requirements
	3		Review and Approve Requirements
	4		Requirements Complete
	5		Design
	6		Document Design
	7		Review and Approve Design
	8		Design Complete

**Goldlab** EDIT LINKS

## Documents

**New** **Upload**

All Documents ... Find a

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Projects
- Project Details
- Recent
- Deliverables
- Risks

**Goldlab** EDIT LINKS

### Project Summary

Documentat... due 63 days ago

11 late

- Review and Approve Requirements Due 11/16/2015 by Jacques Goupil
- Requirements Complete Due 11/16/2015
- Review and Approve All Designs Due 1/19/2016 by Scott Clausen
- Design Complete Due 1/19/2016
- Development/Implementation Due 4/12/2016 by Scott Clausen
- Development/Implementation Complete Due 5/24/2016
- Rework -- 003 Due 5/24/2016
- Testing/Verification Due 6/22/2016 by Scott Clausen
- Testing/Verification Complete Due 6/22/2016
- Documentation Due 8/18/2016 by Scott Clausen
- Final Signoff Due 8/18/2016

### Newsfeed

Start a conversation

Jacques Goupil  
Communication ... see this helpful link <http://ppmworks.com>  
Friday, January 23, 2015 Like Reply

Jacques Goupil  
Please attend the upcoming Status Meeting.  
Friday, January 23, 2015 Like Reply

### Documents

**New** **Upload** **Share**

- Specification
- MSFT District Map
- Project Server Report Samples
- Business Driver

Drag files here to upload

# 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 ▾

Cards Charts

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	Radine Patterson	Liberty, Inc.	6/1/2012	9:00 AM
3	Phyllis Harlow	Northwind Traders	6/1/2012	9:30 AM
4	Aaron Michels	Lucerne Publishing	6/1/2012	10:00 AM
5	Brian Welcker	Margie's Travel	6/4/2012	10:30 AM
6	Jeff Smith	Proseware, Inc.	6/4/2012	11:00 AM
7	Radine Patterson	Liberty, Inc.	6/4/2012	11:30 AM
8	Jeff Smith	Proseware, Inc.	6/4/2012	12:00 PM
9	Brian Welcker	Margie's Travel	6/5/2012	
10	Brian Welcker	Margie's Travel	6/5/2012	
11	Phyllis Harlow	Northwind Traders	6/5/2012	

volunteerassignments

Set menu options for caterer

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

Confirm flights

Confirm John's Southwest flight

Order custom pens

Finalize budget

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

## 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 shows the 'Task Details' view in Microsoft Planner. The task is 'Finish company picnic slideshow', assigned to Kat Larsson, with a due date of 4/30. It includes a description, attachments (including a presentation and a photo), and a comments section. The interface is part of the Office 365 Planner app, showing a list of tasks on the left and a detailed view on the right.

## Custom labels

Highlight key tasks with colorful customizable labels.

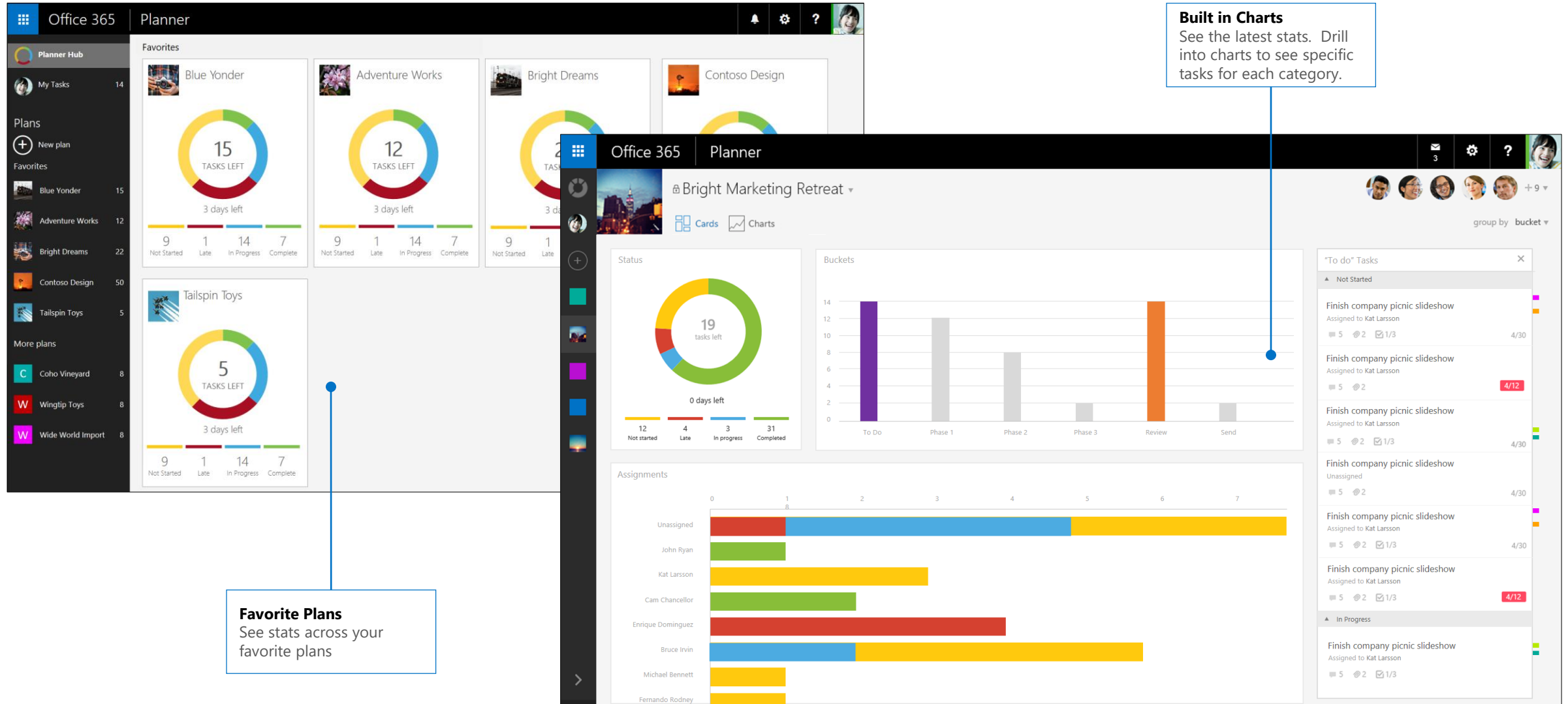
## Checklists

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





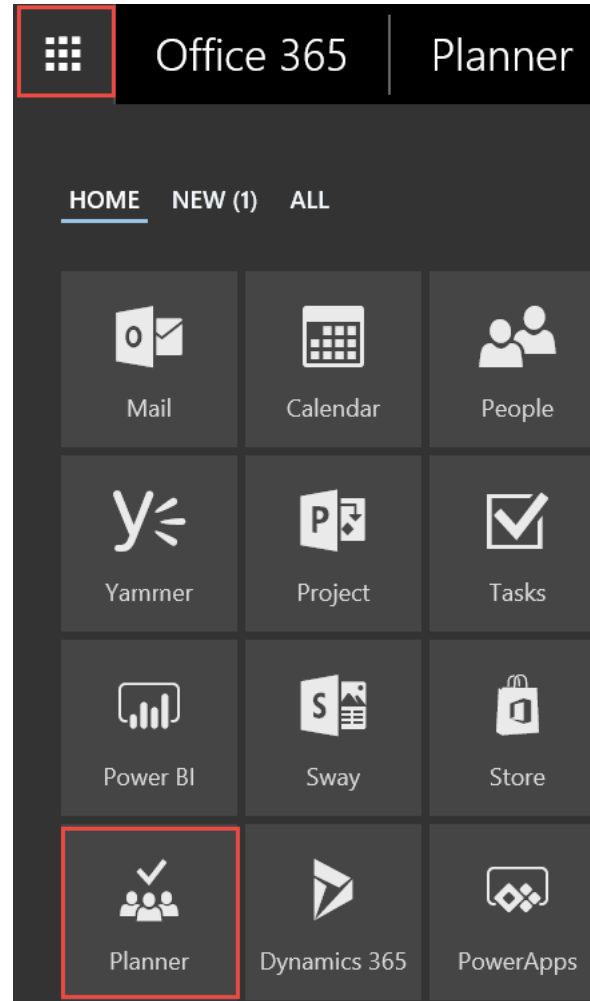
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Diane Prescott is a product marketing manager for Contoso, which specializes in cutting-edge consumer technology. She's leading the planning efforts for an upcoming tech conference where Contoso will showcase one of its newest products, a virtual reality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

# Creating a New Plan

To begin using Planner:

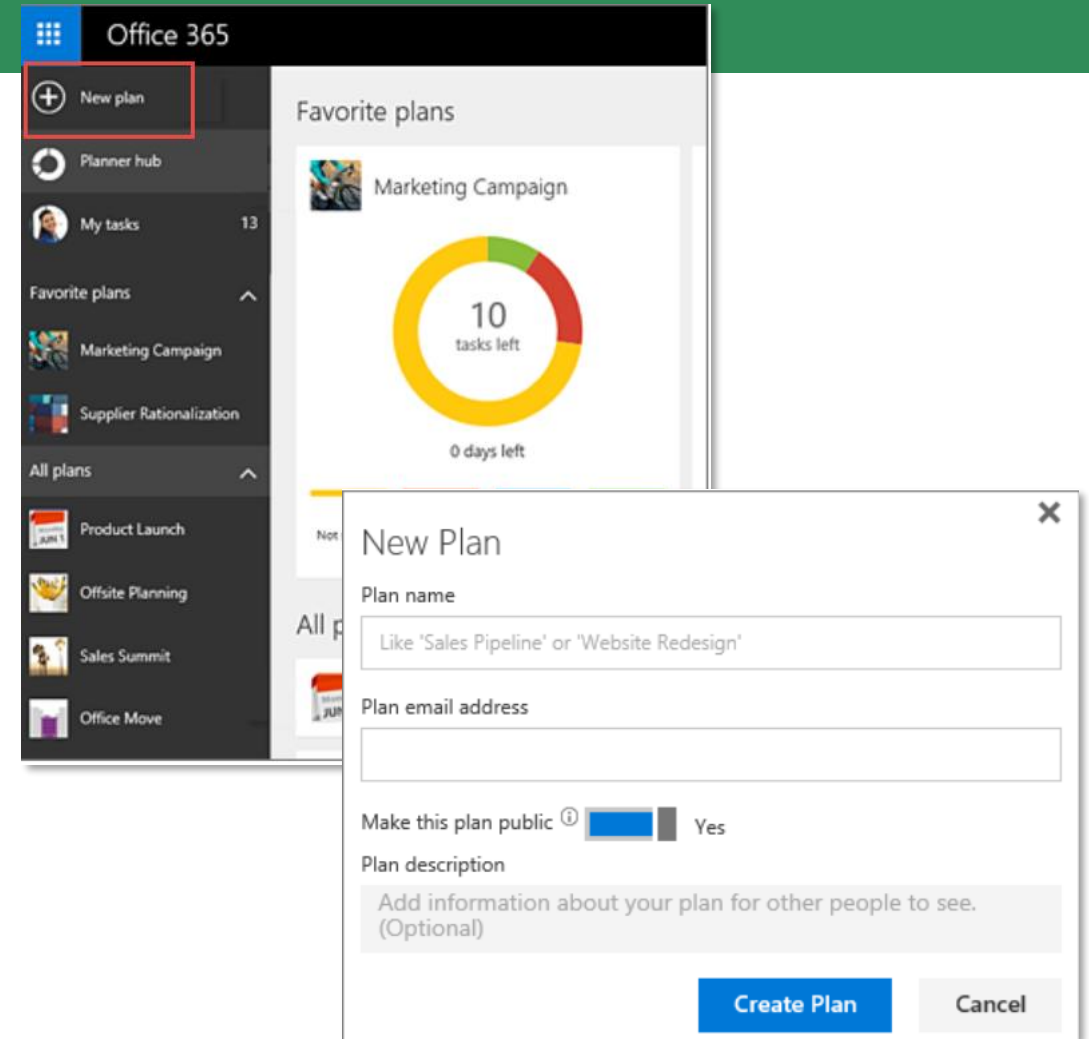
- Select the **App Launcher**
- Select **Planner**



# Create a New Plan

To create a new plan:

- Select **New Plan**
- Enter the name
- Enter an email address (optional)
- Make it public so the entire organization can see it or private for only plan members
- Entire a description to differentiate from other plans
- Select **Create Plan**

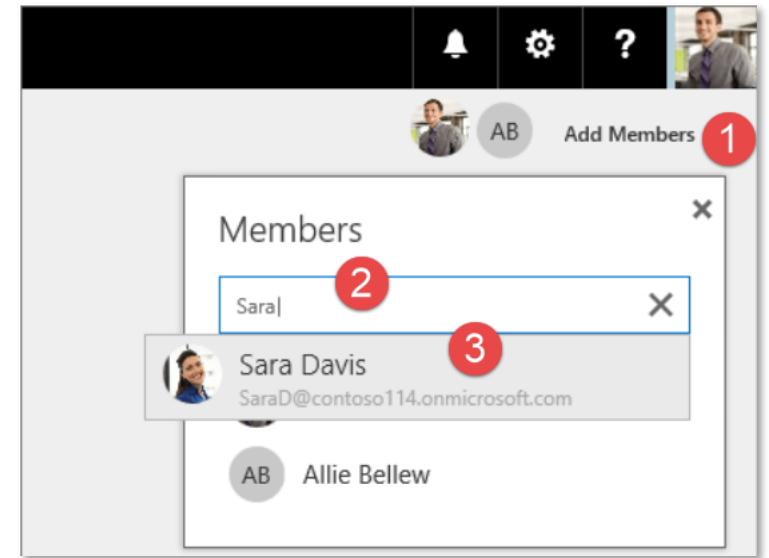


# Add Members

Creating a plan also creates a new Office 365 Group. Collaborate with your group in OneNote, Outlook, SharePoint and other apps. The email address goes to Outlook Conversations.

Add people to the plan:

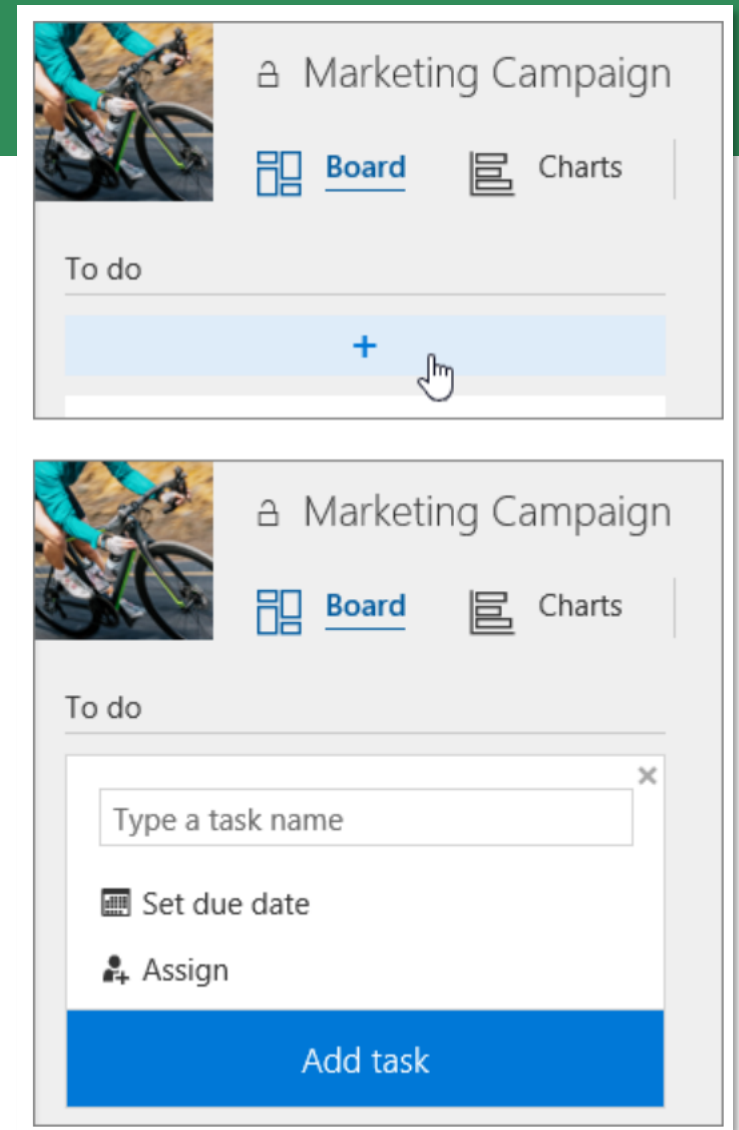
1. Select **Add Members**
2. Type in the name or email address
3. Select the person's card when it appears



# Add Tasks

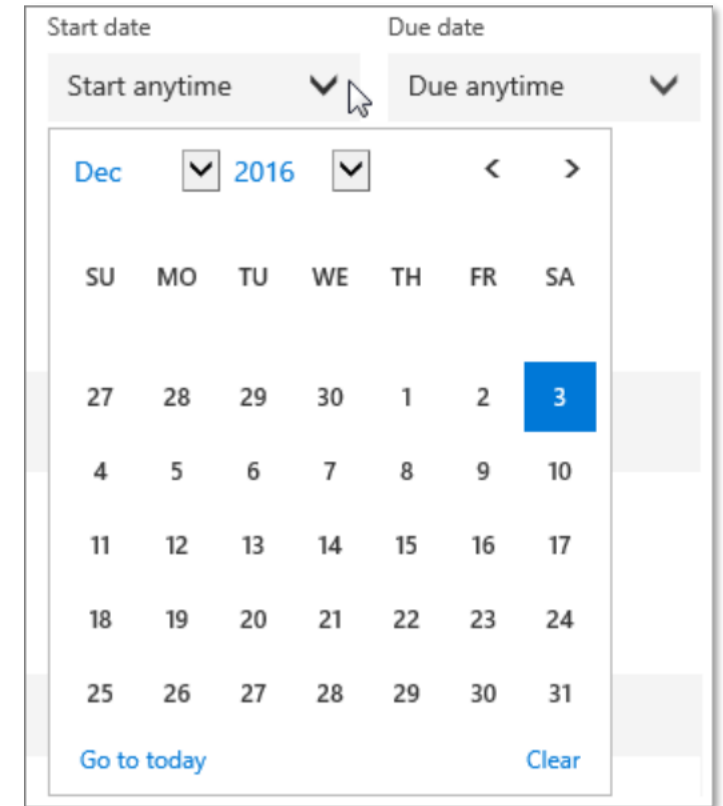
To add tasks:

- Select + below the To do
- Enter the name in **Type a task name**
- Select Set due date (optional)
- Click **Add task**
- Type in new task names and click enter to quickly add new tasks



# Add Start and Due Dates

- Click on the task to open for editing
- Select **Start anytime** and select the **Start Date**
- Select **Due anytime** and select the **Due Date**
- Click on **Dismiss X** to save and close



The screenshot shows a date selection interface with two main sections: 'Start date' and 'Due date'. Each section has a dropdown menu with 'Start anytime' and 'Due anytime' options. Below these are calendar pickers for the month (Dec), year (2016), and day (3). The calendar grid shows days of the week (SU, MO, TU, WE, TH, FR, SA) and dates from 27 to 31. The date '3' is highlighted in blue. At the bottom, there are links for 'Go to today' and 'Clear'.

Start date		Due date				
Start anytime	▼	Due anytime	▼			
Dec	▼ 2016	▼	< >			
SU	MO	TU	WE	TH	FR	SA
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
Go to today				Clear		



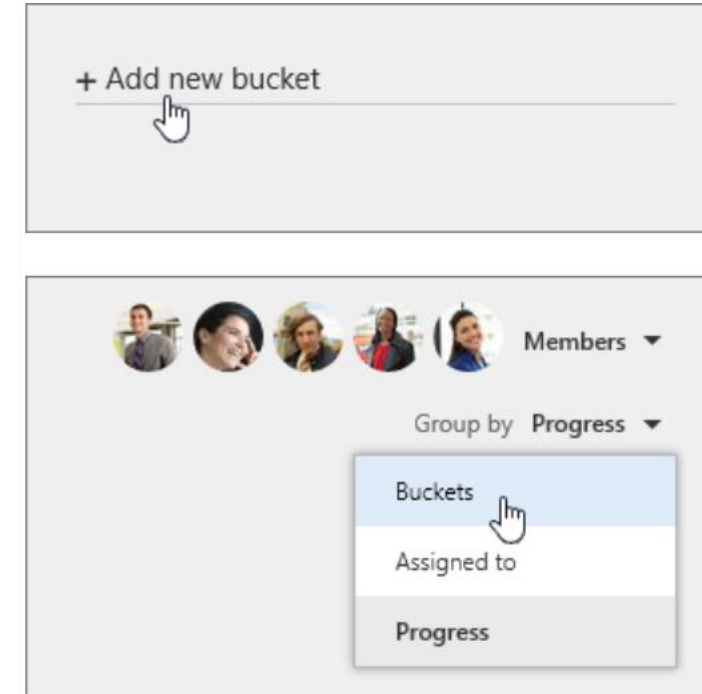
# Buckets

Buckets organize tasks into workstreams, project phases or topics.

- From the plan board, select **Add new bucket**
- Type in a name and then enter

**Note:** If you do not see Add new bucket

- Select **Group by**
- Select **Buckets**
- Tasks can grouped by bucket, assignment, or progress

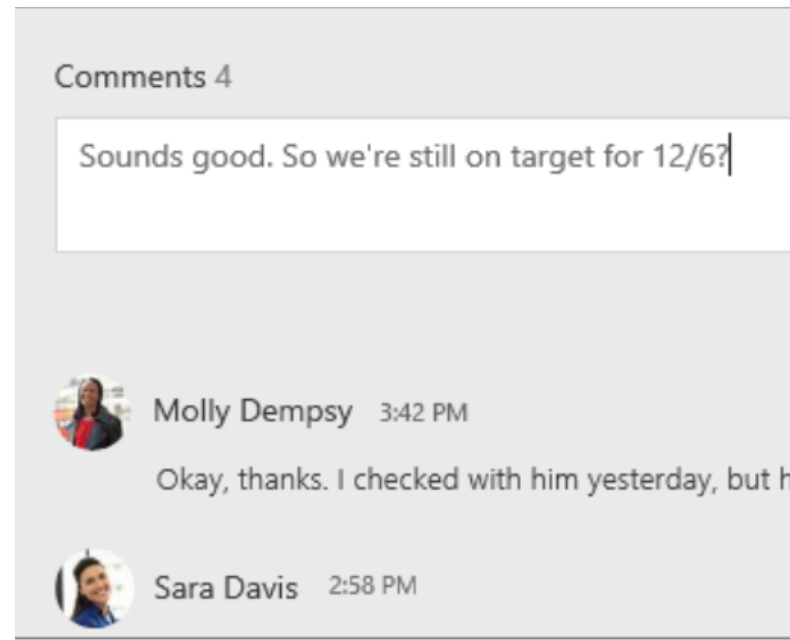


**Tip:** Bucket names can be changed

# Add Comments

To add comments on a task:

- Click on the task to open the window
- Select **Type your message here** in the comments area
- Type in your comments
- Select **Post**



# Add an Attachment

To add an attachment:

- Click on the task to open the Window
- Select **Attach** in the attachments area
- Select **Browse SharePoint** or **Upload a file**



The first time you attach a file, photo or link to a task, that attachment becomes the task's preview picture.

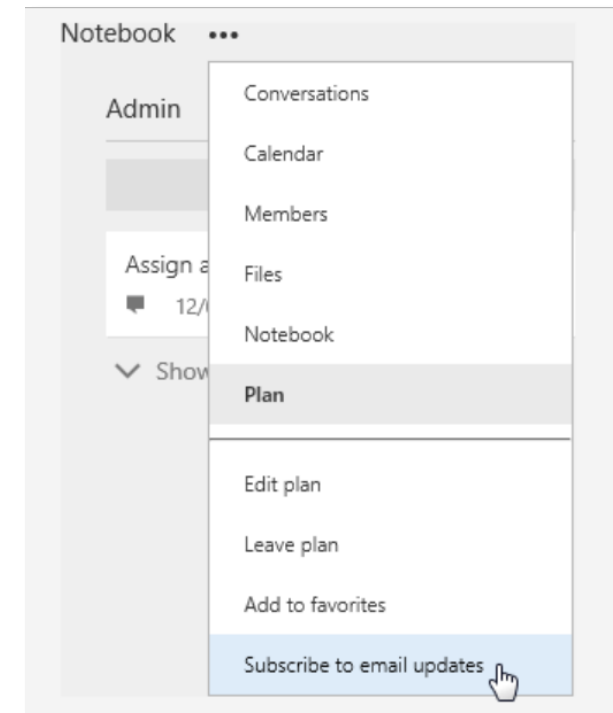
# Subscribe to Email Updates

To receive emails:

- Select **More...** at the bottom of the links
- Select **Subscribe to email updates**

You will receive an email when:

- A plan member adds a comment to a task
- A task is assigned or reassigned to any plan member



# View Plan Progress

Every plan has a board and charts.

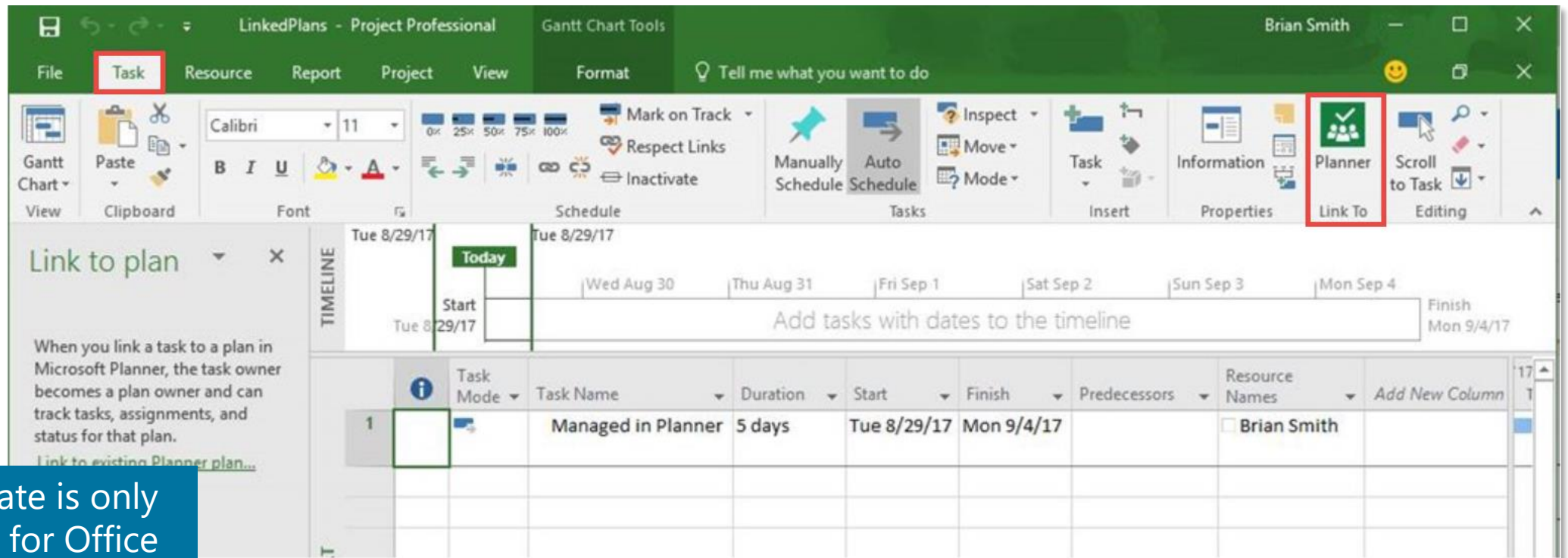
- Board – flexible way to organize your team's work
- Charts – display plan progress, with details about what is complete, in progress, not started, and late

Select **Board** or **Charts** to toggle between the two views.



# Linking Plans to a Project Task

Coming soon! As this new enhancement is rolled out, some environments will see the new *Planner Link to* command on the Task ribbon in Project Pro already.



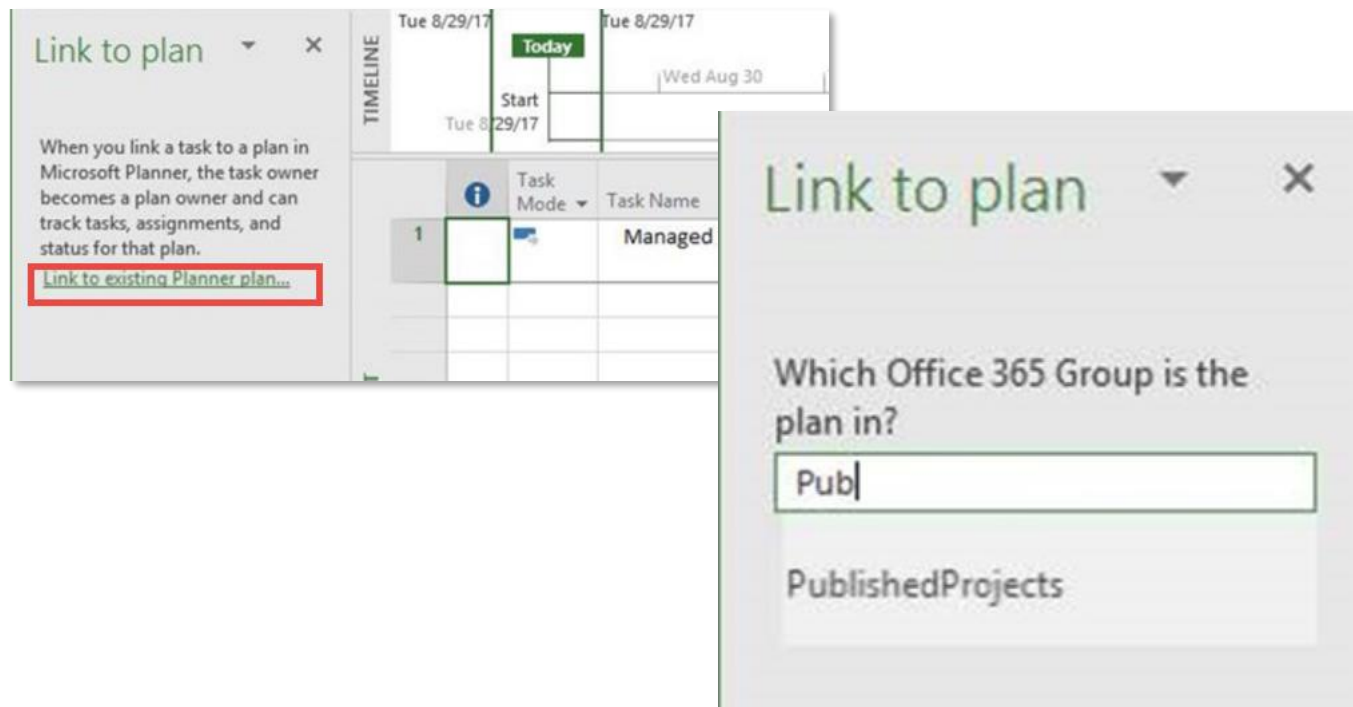
This update is only available for Office 365 subscriptions.



# 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



# Linking Plans to a Project Task

When selecting the plan you will see who will be added to the group.

**What happens if the group has more than one plan?**

You will be prompted to select the plan.

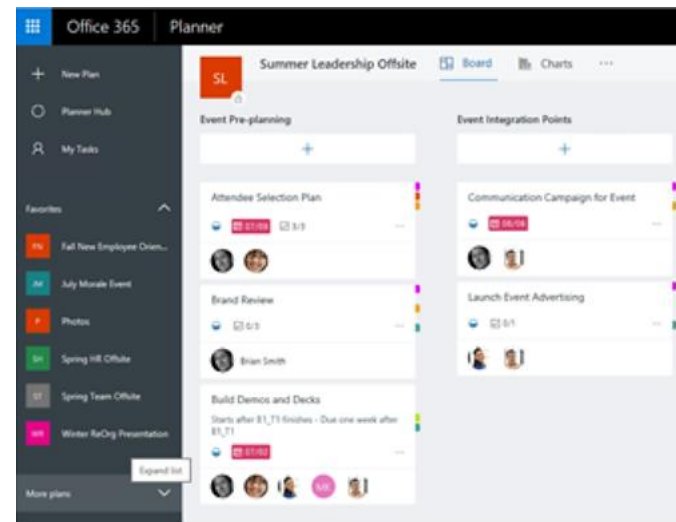
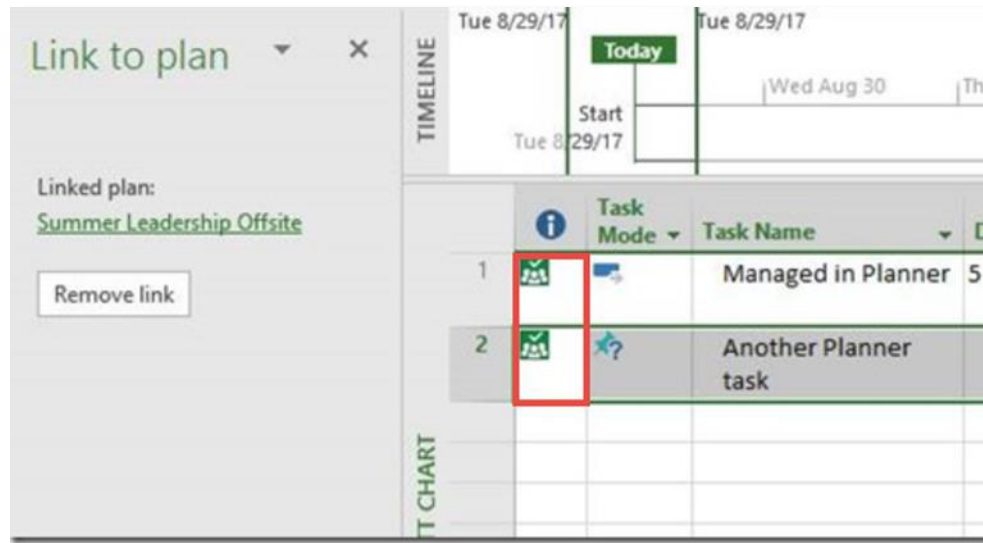
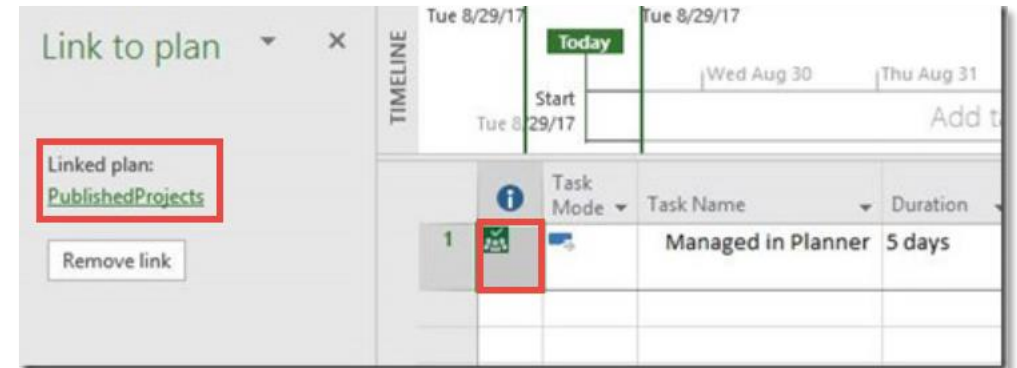
Both the project and the task must be published to create the link.

The image displays two side-by-side screenshots of the 'Link to plan' dialog box. Both dialogs have a title bar with 'Link to plan' and a close button. The left dialog shows the 'PublishedProjects' group selected in the 'Which Office 365 Group is the plan in?' dropdown. Below this, it says 'Choose a plan from the PublishedProjects group:' and lists 'PublishedProjects' with a radio button. At the bottom, it says 'The following people will be added to the 'PublishedProjects' plan:' and lists 'BS Brian Smith' with a red arrow pointing to it. A 'Create link' button is at the bottom right. The right dialog shows the 'MyFirstTeam' group selected in the dropdown. It says 'Choose a plan from the MyFirstTeam group:' and lists 'Plan One' and 'Plan Two' with radio buttons. 'Plan One' is selected, with a red arrow pointing to it. At the bottom, it says 'The following people will be added to the 'MyFirstTeam' plan:' and lists 'Brian Smith' and 'SD Sara Davis'.

# Linking Plans to a Project Task

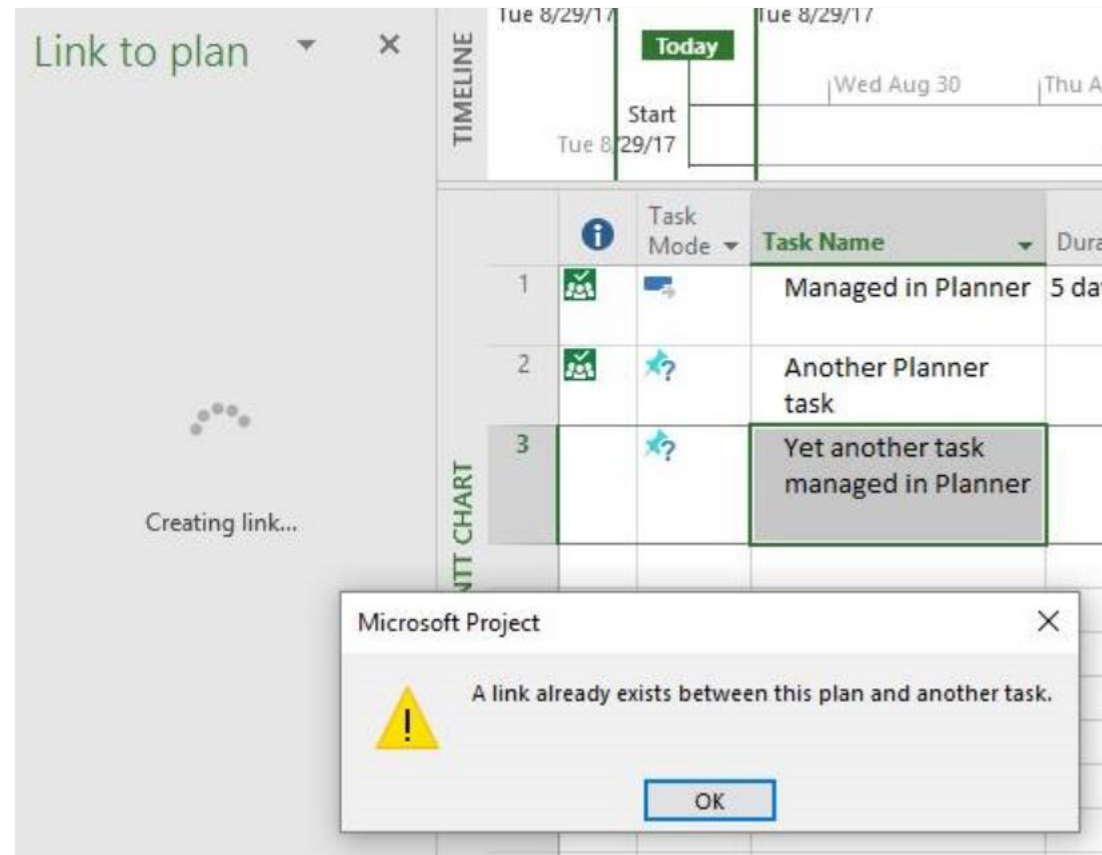
Once the link is created a link will appear in Link to guide and an icon will appear in the indicator column.

- You can link to multiple plans
- Clicking the link takes you to the plan



# Linking Plans to a Project Task

You cannot link two different tasks to the same plan. You would not be able to distinguish which task the plan progress was being made against.





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

- Start incorporating these techniques today
- 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 PPM Works

- **Gold Microsoft Certified Partner** exclusively focused on **Microsoft Project, SharePoint, and Office 365**
- Some recent **Experience** includes Allergan, Medtronic, Plantronics, Shire, Synopsys and many more...



- We believe in **partnering** with you, **exceeding expectations** to build **long lasting success**.
- Our team's experience runs deep with Microsoft.
  - Over **225 Project Server implementations** and Trained **thousands** of students
  - Delivered **dozens** of Industry presentations (Microsoft Project Conference, Project Summit, PMI Conference)
  - Created **hundreds** of webcasts and blog articles
- We have contributed to the **new release of Microsoft Project and Project Server** for the past three cycles and share our expertise as volunteers for Microsoft, PMI, MPUG, and Project Summit.
- We **guarantee your success** and **our results** – we are not done until you are a satisfied client reference





# 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

# Question and Answer



# Contact Us

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

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**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 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.

# Upcoming PPM Works Events

Event	Date
PMI® Mass Bay PDD 2017	September 22-23
Microsoft Ignite	September 25-29
PMI® Minnesota PDD 2017	September 25-28
<b>PPM Works Webinar:</b> Microsoft's Complete Work Management Solution	September 28 12 PM
Boston PPM Community Meeting	October 4 5:30-7:30 PM
<b>PPM Works Webinar:</b> The Scheduling Formula	October 10 12 PM
Project Summit Business Analyst World Boston	October 16-19
Dashboard in a Day Workshop	October 26 8-9:30 AM