Integrating Project Online with Office 365 Planner

Presented by: Jenny Ward
September 13, 2018
Agenda

What is Task Management?

Overview of Project, Planner, and Team Productivity

Linking Plans to Tasks in Project Online

When to Use Planner vs Project Online

Q & A and Next Steps
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.
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/coach.

Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you made 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 PMUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful.

Sr. Project Manager Consultant, Large Legal Firm
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
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 does your organization use today to facilitate collaboration and manage effort? (Project, Excel, O365, Shared Drives, To Do, 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?
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
**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.

**SharePoint**

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

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**Project Online**

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.
<table>
<thead>
<tr>
<th>Use Case</th>
<th>Planner</th>
<th>Project Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to track tasks but I am unfamiliar with project management tools.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>I want to quickly enable my team to use OneNote, Outlook, SharePoint.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>I am resistant to learning a new tool, or don’t have the time to do this now.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>I prefer a detailed WBS, with task dependencies, and task tracking against baselines.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Our organization uses timesheets to track task progress.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>I need to track progress for all my projects at the portfolio level with executive visibility.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>I need to create custom views, groups, and filters for tasks</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>I want to easily track risks, issues, and deliverables</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>I want a simplified visual that displays who is doing what and what progress has been made.</td>
<td></td>
<td>Link to Planner</td>
</tr>
<tr>
<td>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.</td>
<td></td>
<td>Integration at Task Level</td>
</tr>
</tbody>
</table>
Use Case Scenarios

1. Planner

2. Project Online

3. Link from Project to Planner

4. Integration from Project to Planner
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

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

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

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

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

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

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

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.
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
Risk / Issue Management

Flexible Reporting including Excel, Power BI, Dashboarding
Team Collaboration and Doc Management

Easy Collaboration with Project Site and Documents at a project or task level.
Use Case Scenario #3

Mary Cooper wants 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 her 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 for 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
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

Your Opportunity

Portfolio Value = Value Potential x Ability to Realize

Ad hoc
- No Portfolio Inventory or Process
- "Just Do It/FIFO"
- Success is random
- Poor transparency

Project Inventory
- Processes are defined & documented, and most projects are aligned to Business Driver
- All projects are consistently captured in a project inventory

Project Portfolio
- Portfolio analysis is repeatable, predictable, and consistently used to evaluate and optimize project portfolio selection
- Portfolio Management teams are able to understand, analyze, & recommend optimal portfolio bundles and schedules to technology and business partners

Cross Portfolio
- PPM is adopted and used consistently across multiple organizations and portfolios
- Portfolio Analysts can compare and leverage portfolio analysis information across multiple departments
- Consistent measures enable cross portfolio analysis, selection, planning and management that supports predictive modeling and internal/external benchmarking

Enterprise
- PPM is optimized across the enterprise with a focus on continuous risk mitigation and value creation
- Project portfolio performance and risk data is understood and can be compared at the individual, cross-LOB, and enterprise levels
- Senior leadership is able to leverage PPM analysis when allocating funds to various portfolios
- Ability to measure and benchmark entire portfolio lifecycle

Stages of Excellence

Basic
- Crawl

Walk
- Run

World-Class
- Well-oiled Machine
## Feature Comparison

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

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<tr>
<td>Scheduling engine (Start and Finish calculated by pred/succ tasks)</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Portfolio Views</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td><strong>Portfolio Views with indicators</strong></td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Supports Master Projects/Sub Projects</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Create custom views</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Custom project-level fields</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Track effort and cost</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td><strong>Manage issues, risks, and deliverables</strong></td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Customize the User Interface</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Timesheets</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Multiple levels of tasks supported</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td><strong>Schedule Templates</strong></td>
<td>+</td>
<td>+</td>
</tr>
</tbody>
</table>
Question and Answer
PPM Works Upcoming Events and Webinars

- **September 20th @ 1 PM**

- **September 24th - 26th**
  PMI Minnesota Chapter Professional Development Days

- **October 2nd – 3rd**
  Project & Portfolio Management Summit – Burlington, MA

- **October 4th @ 1 PM**
  PPM Works Webinar: Tips and Tricks: Project Detail Pages

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Our Site: www.ppmworks.com
Blog: http://blogs.ppmworks.com

Calls To Action

1. Start incorporating these techniques today
2. Register for the PPM Summit in Burlington, MA at ppmworks.com/events
3. Check out our Blogs / webcasts
4. Get LinkedIn with me (Your Name)
5. Get LinkedIn with PPM Works
6. Send questions to Info@ppmworks.com
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
Web: www.ppmworks.com