



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

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

Jenny Ward



Senior PPM Specialist

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.



Project



SharePoint



Office 365



Power BI

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/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

PPM Works Services and Solutions

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



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

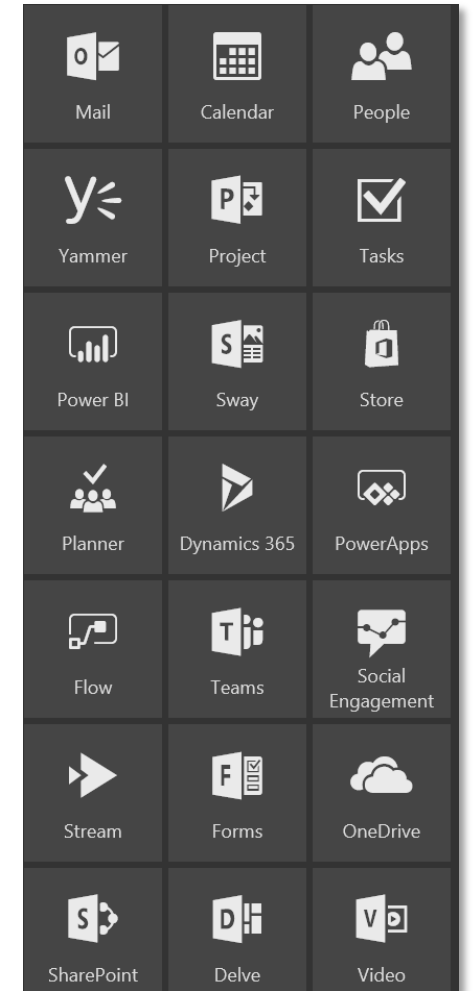
Use **Q and A tab** for questions
Respond to the **Poll** in the middle of the session
Live Question and Answer session at the end of the session

Quick Question for Group

What tools 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



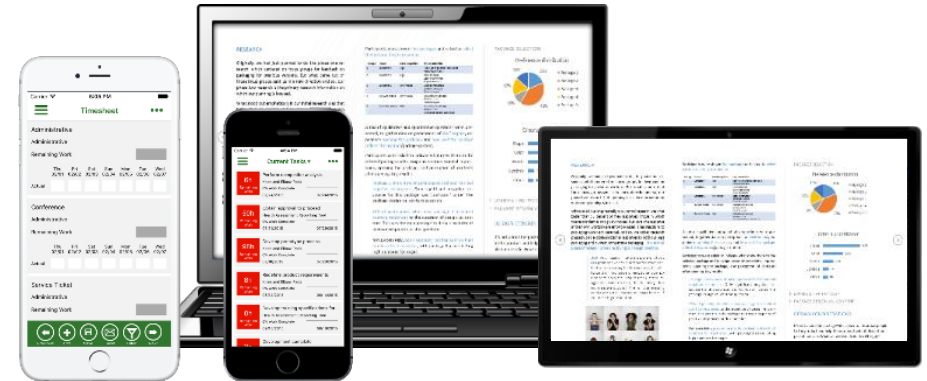
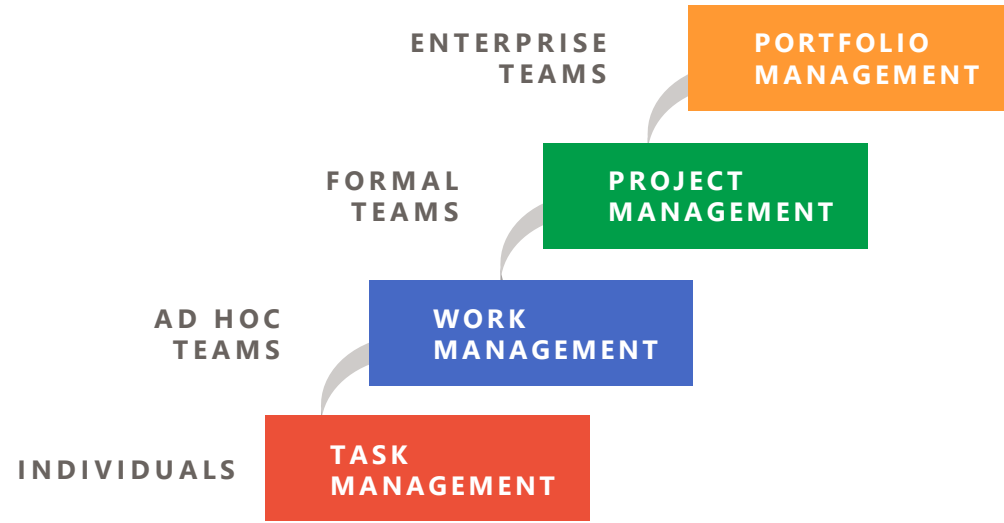
Structured resources for large groups of people that are focused on a common goal or area of the company

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

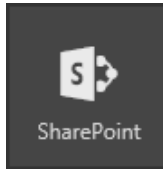
Integrated solutions for individuals, teams and major programs

Project Online and Planner

AD HOC TEAMS

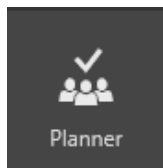
WORK MANAGEMENT

SharePoint



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

Planner

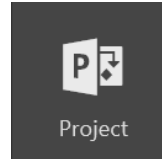


An Office 365 App to create a team, build a plan, assign tasks and check progress. Planner is about simplicity & ease of ramp up and use.

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, or don't have the time to do this now.	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 at 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	

Use Case Scenarios

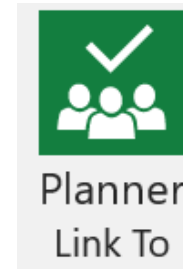
1. Planner



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

Set menu options for caterer

Obtain corporate sponsor logos

Finalize budget

Choose event venue

Confirm flights



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." Below the description are six attachments, including a calendar, a menu, a photo of a picnic, and two business plan documents. The interface also shows a list of other tasks on the left, such as "Finalize budget", "Order custom pens", and "Confirm with volunteers".

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

Wingtip Toys 8

Wide World Import 8

Favorites

Blue Yonder 15 TASKS LEFT 3 days left

Adventure Works 12 TASKS LEFT 3 days left

Bright Dreams 2 TASKS LEFT 3 days left

Contoso Design 50 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

Cards Charts

Status

19 tasks left 0 days left

Buckets

Assignments

To do Tasks

Not Started

Finish company picnic slideshow Assigned to Kat Larsson 4/30

Finish company picnic slideshow Assigned to Kat Larsson 4/12

Finish company picnic slideshow Assigned to Kat Larsson 4/30

Finish company picnic slideshow Unassigned 4/30

Finish company picnic slideshow Assigned to Kat Larsson 4/30

Finish company picnic slideshow Assigned to Kat Larsson 4/12

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:

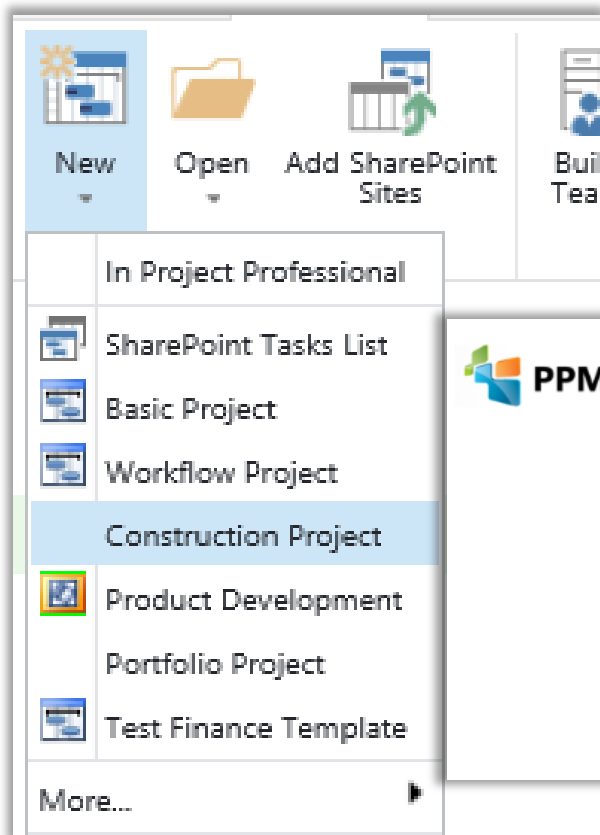
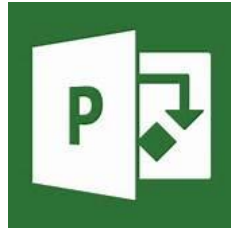
- Project pro is known
- Cross-project Task view
- Automate status reports
- Track Issues, Risks and create cross project dependencies



Task Management

Project Creation, Task Updates, and Document Approval Workflow

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



PPM Works PWA Demo

Tasks

	Task Name	Start ↑	Finish	Remainir	Period Total	Sun 1
	▶ Planning Window: In Progress for Current Perio	10/29/2015	11/30/201	220h		
	▶ Project Name: Building furniture Installation	10/29/2015	11/19/201	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
	▶ Project Name: Waste Water Refinement Plant	11/9/2015	11/30/201	100h		
5		11/30/2015	100h	0h		
015		12/9/2015	96h			
015		12/9/2015	96h			
15		12/9/2015	96h			
15		4/1/2016	580h			
015		12/16/201	40h			
15		12/16/2015	40h			
15		4/1/2016	540h			
5		12/7/2015	20h			
15		4/1/2016	520h			

PPM Works

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
Running Workflows	

Risk / Issue Management



Flexible Reporting including Excel, Power BI, Dashboarding

Project Overview Dashboard

Navigation: Biolight | building furniture | building furniture | Cloudcom

ProjectName	ProjectStartDate	ProjectFinishDate	ProjectPercentCompleted
Biolight	9/17/2015	7/18/2016	0

AssignmentWork, and AssignmentActualWork by ProjectName

Goldlab Issues

new item or edit this list

ID	Title	Assigned To	Status	Priority	Category	Due Date
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	

Risks

Risk Title	Score	Color
Catastrophic	<=10	Red
Major	<=8	Orange
Moderate	<=6	Yellow
Minor	<=4	Green
Insignificant	<=2	Dark Green

Risk Title	Score	Color
Microsoft Exchange Online migration	Architecture Consultant might still be off sick	Red
Microsoft Exchange Online migration	Bandwidth might not be sufficient for office connections	Yellow

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 table of tasks with their IDs, modes, and names.
- Documents Panel (Middle):** Features a navigation menu with options like Home, Notebook, Documents (highlighted), 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.
- Documents Page (Right):** Displays a "Documents" page for "Goldlab" with a "Project Summary" section. It shows a list of documents with their due dates and authors, including "Review and Approve Requirements" due 11/16/2015 by Jacques Goupil. A "Newsfeed" section shows a message from Jacques Goupil dated Friday, January 23, 2015. A "Documents" sidebar on the right lists available document types for upload.

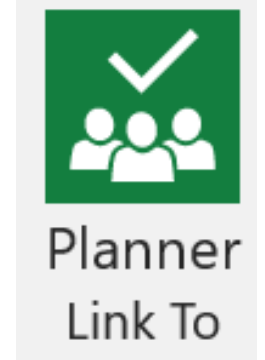
ID	Mode	Task Name	Duration
1	...	Requirements	
2	...	Document Design	20d
3	...	Review and Approve	5d
4	...	Requirements	
5	...	Design	25d
6	...	Document Design	20d
7	...	Review and Approve	5d
8	...	Design Complete	0d

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**.

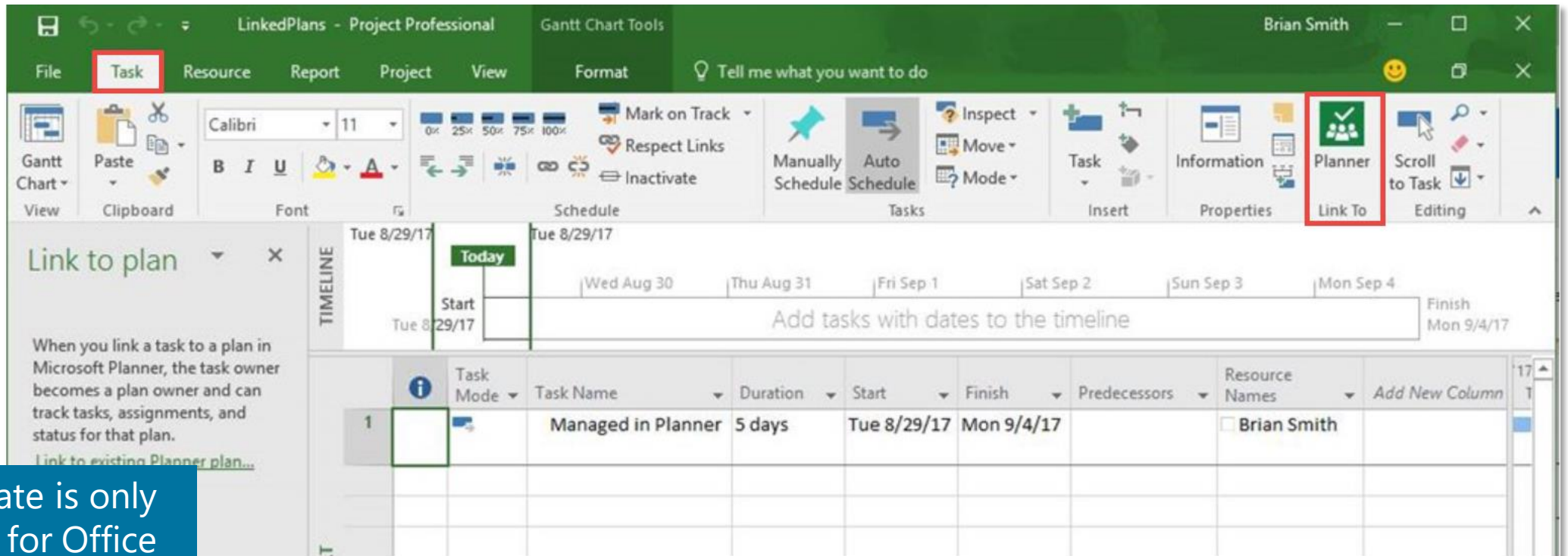


Summary:

- 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



The screenshot shows the Microsoft Project Professional interface. The 'Task' ribbon is active, and the 'Planner Link To' button is highlighted with a red box. The ribbon includes sections for Gantt Chart, Clipboard, Font, Schedule, Tasks, Insert, Properties, and Editing. The 'Planner Link To' button is located in the Properties section. Below the ribbon, a task is shown in a Gantt chart view, and a table below it provides task details.

Task ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1	Managed in Planner	5 days	Tue 8/29/17	Mon 9/4/17		Brian Smith

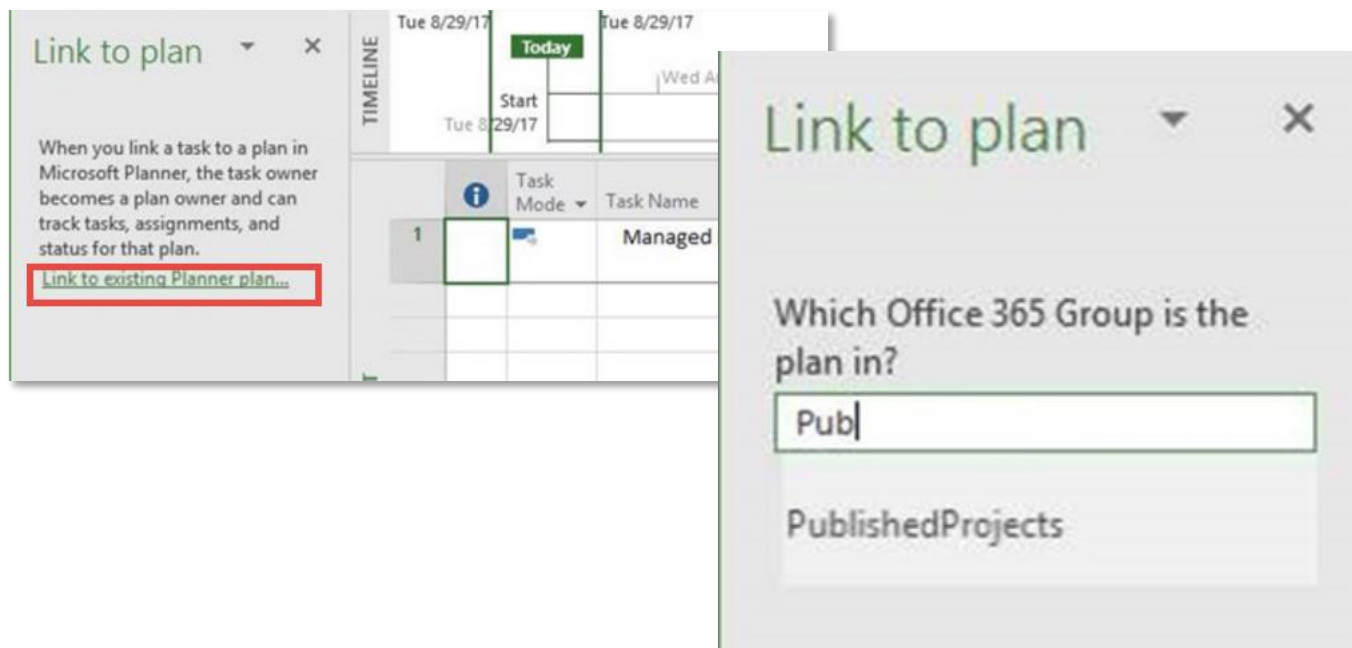
This update is only available for Office 365 subscriptions.

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

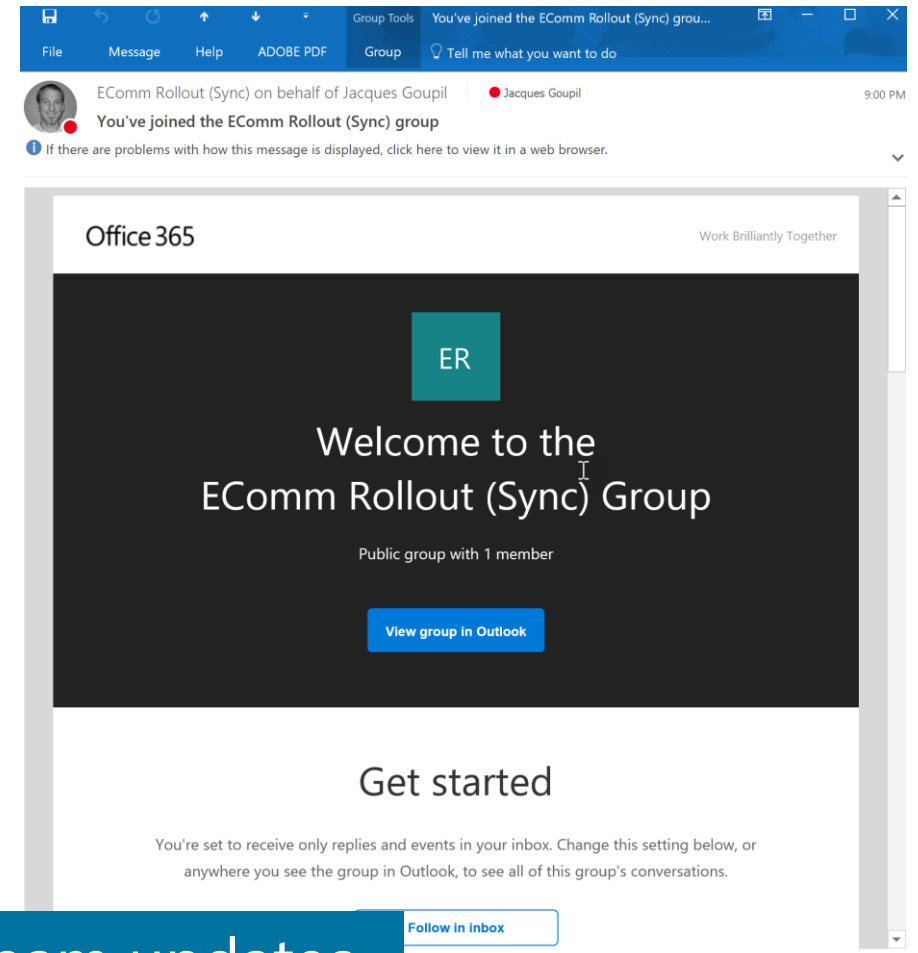
Integration from Project Online to Planner

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



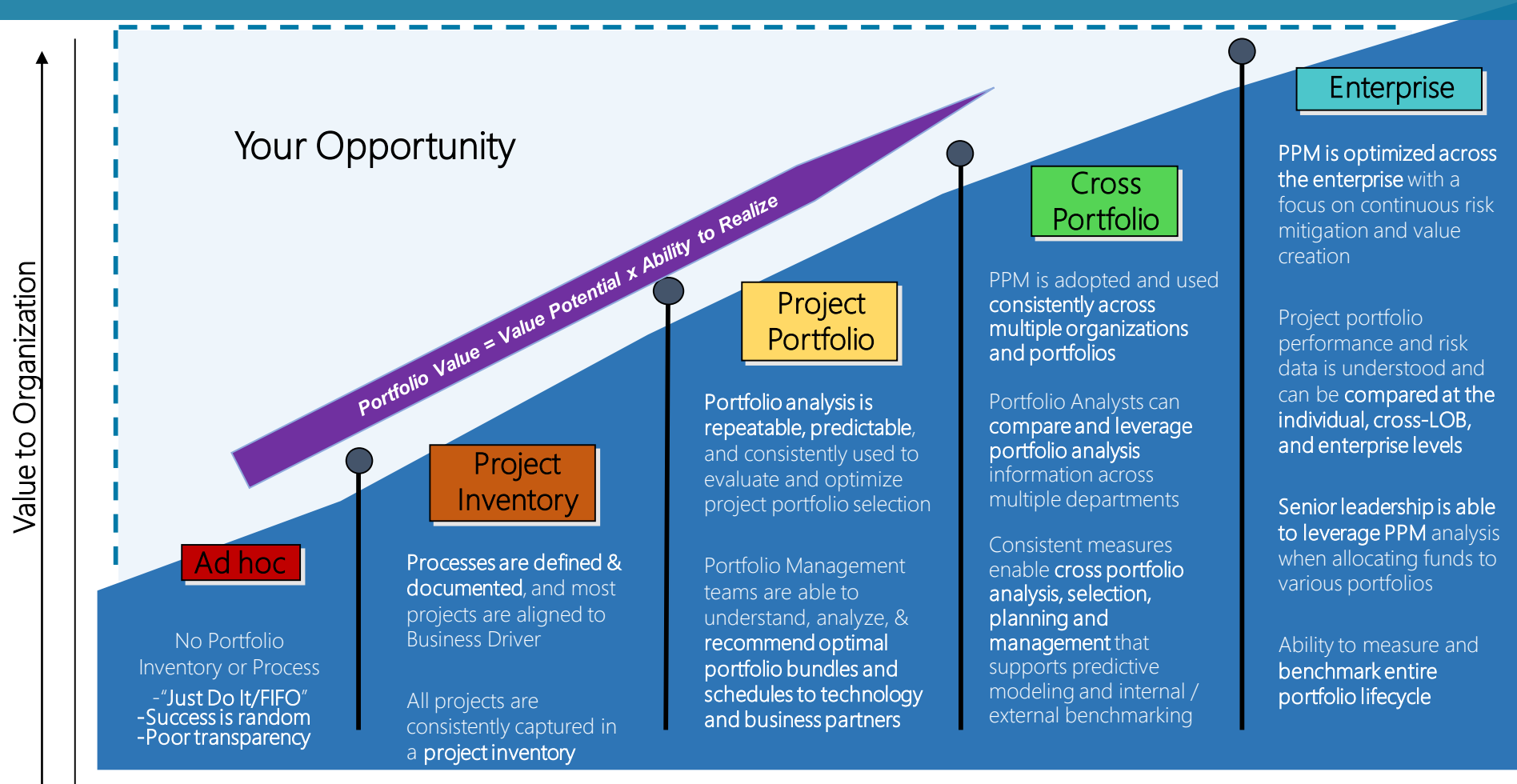
Planner and Project Demo

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

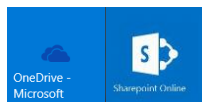
Project Online Demo

Roadmap to PPM Maturity

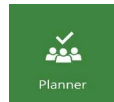
Across the Organization



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



Crawl



Walk



Run



Well-oiled Machine



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)	+	-

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	+	+

Question and Answer



PPM Works Upcoming Events and Webinars

September
20th @ 1 PM

PPM Works Webinar: What's New in Project Pro 2016

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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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

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