PPM Works Project-Planner Sync Tool

The PPM Works Project-Planner Sync tool allows your team to use Planner for task management while managing the execution of projects in Project Online. It provides visibility to your executives through a bi-directional synchronization to/from Project Online and Planner and reduces Project Online license costs.

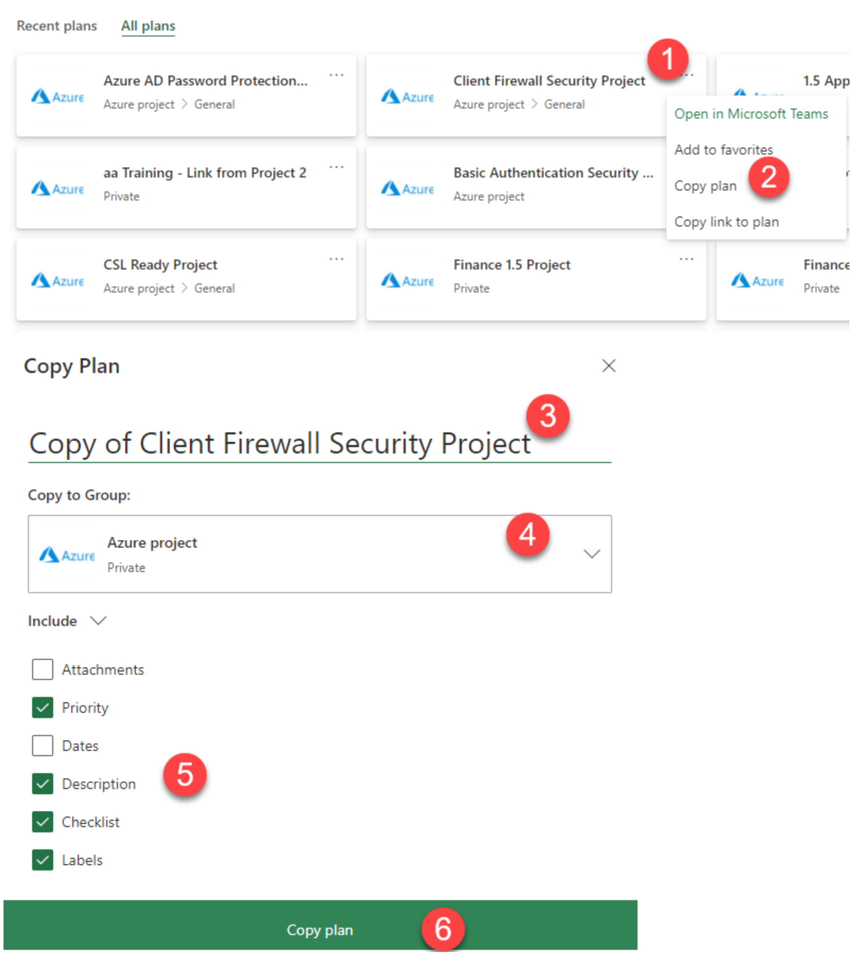
Creating a New Plan from an Existing Plan

Connect to the Planner Hub. You can get there by going to Tasks.Office.com.

1. Click the ellipse next to the plan you wish to copy.
2. Select Copy Plan.
3. Rename the Plan.
4. Select the Group membership - Azure project was used in this example.
5. Select the items you wish to include in your plan.

   Note: It is not recommended to include dates when copying.

6. Click Copy Plan. (The Group must be selected to enable copy)



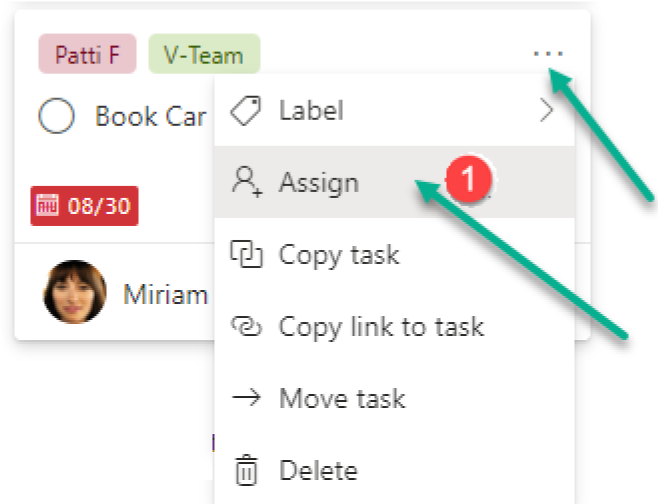
Assign a Task in Planner

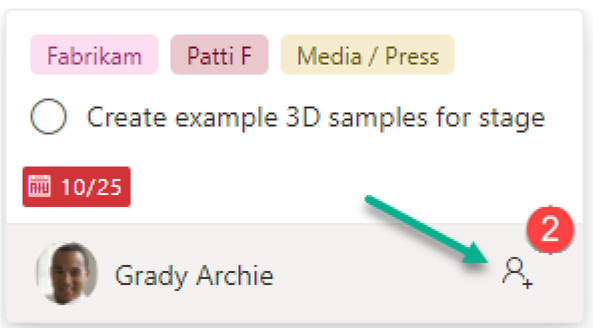
1. If a resource is already assigned on the task, you will see an Assign button on the bottom right corner of the task. Click that button, and then click Assign.

2. If there is no resource assigned, click on the ellipses in the top right corner of the task.

3. Type in the name or email to search for a person or scroll through the list.

Note: Tasks in Planner can be assigned to anyone in your organization, **however** if the user assigned is not a resource in Project Online, the sync will not assign the resource in Project.





Adding Notes to the Planner Task

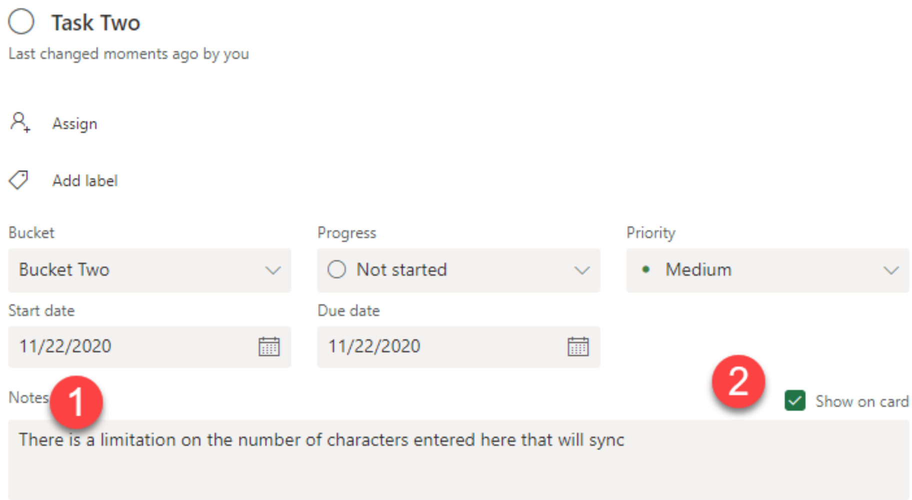
1. Enter notes in the field.

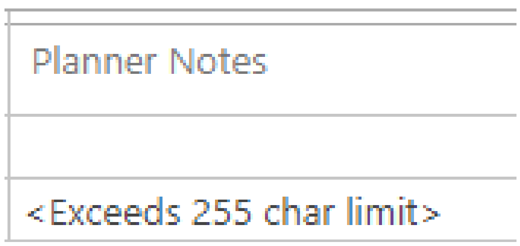
2. Check the Show on card so they are visible when viewing all tasks in the plan.

Notes will sync from Planner to Project.

There is a limitation on notes over 225 characters. If exceeded, upon opening Project the user will receive a warning in the notes field that the notes exceeded the limit.

Once the character limit is exceeded, the Task Notes will no longer be synced until the field has under 225 characters.

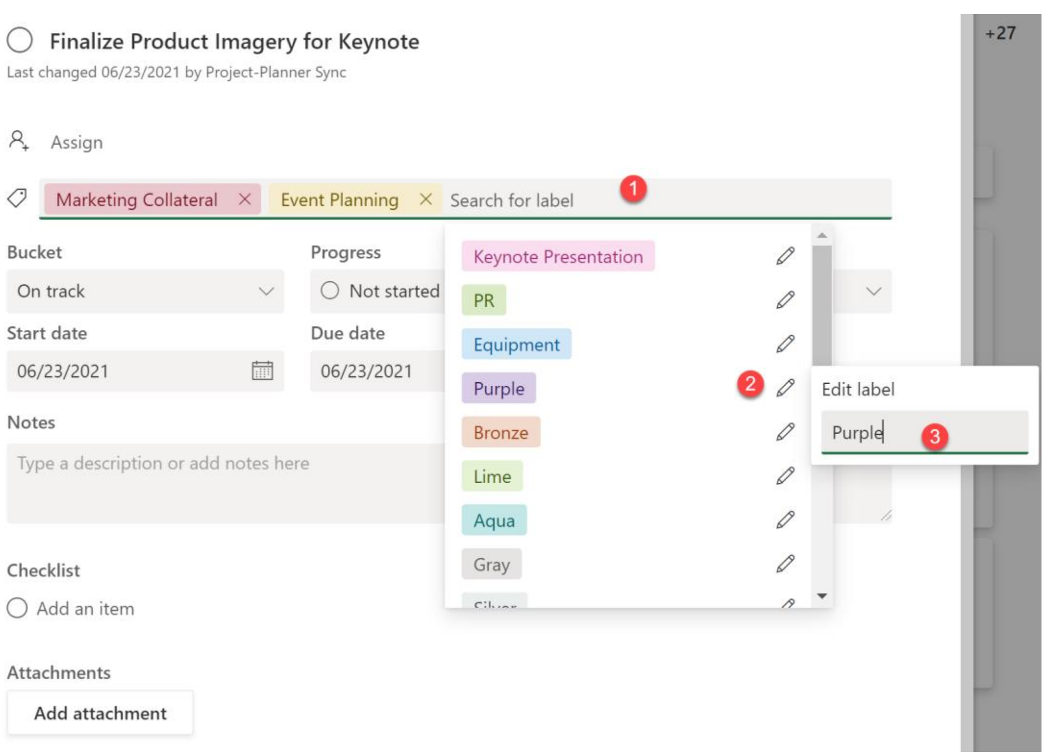




Adding a Label to the Planner Task

1. Click on the label field to see the labels available for selection.
2. Select the label.
3. Click the pencil icon to edit the default color labels.

Note: Labels sync back to Project.



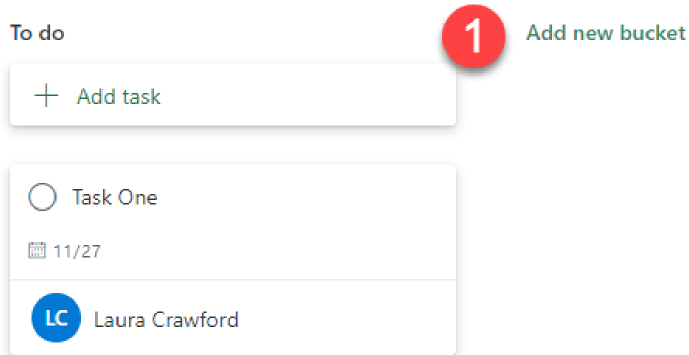
Adding New Buckets to the Plan

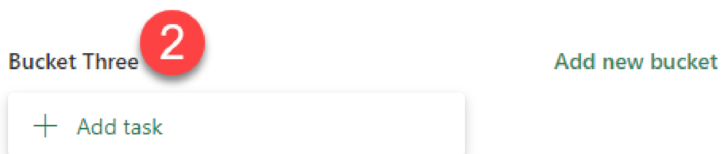
1. Click Add new bucket.

2. Name the new bucket.

The default bucket for all plans is *To do* and this will sync back to Project.

Updates to bucket names and new buckets added will sync back to Project.





Creating a Link from Planner

Connect to the Planner Hub at Tasks.Office.com. Browse Recent Plans, All Plans or Create a New Plan. To create a Link from Planner:

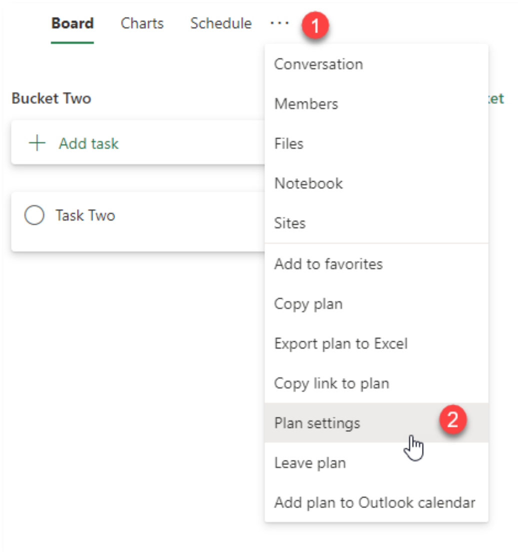
1. Once you have identified a Plan to Link, click the ellipses ("…") to the right of Schedule

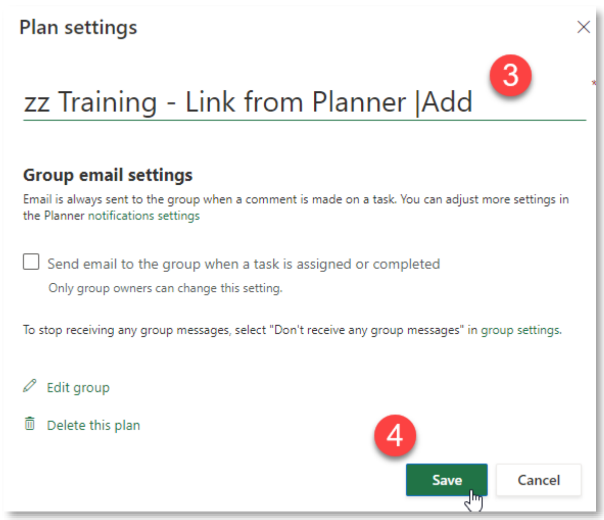
2. Click **Plan settings**

3. Rename the plan, appending " |Add" to the end of the name
   Note: this is a temporary rename to trigger a link from Planner,
   " |Add" will be automatically removed after the link is established

4. Click **Save**

Please allow 15 minutes for the Sync Engine to create a Project Online Project from the Planner Plan





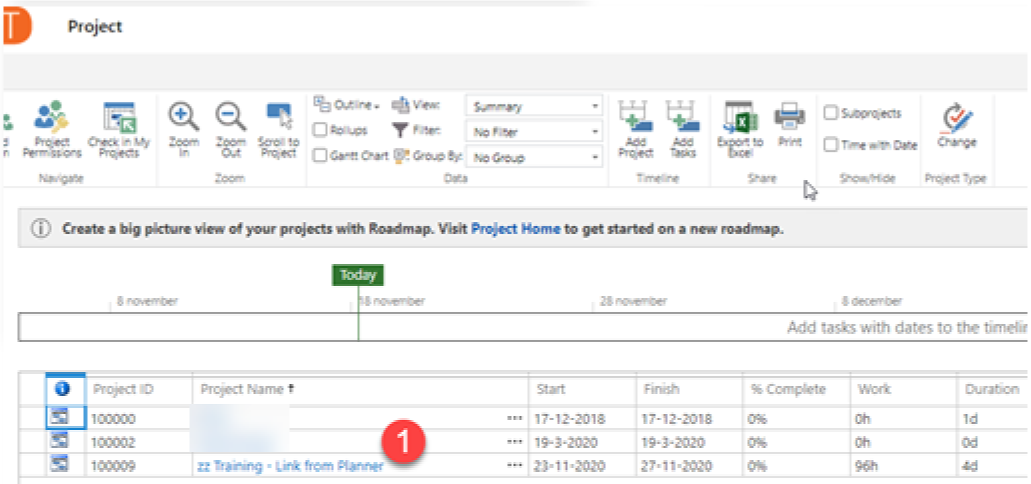
View the Newly Created Project Online Project

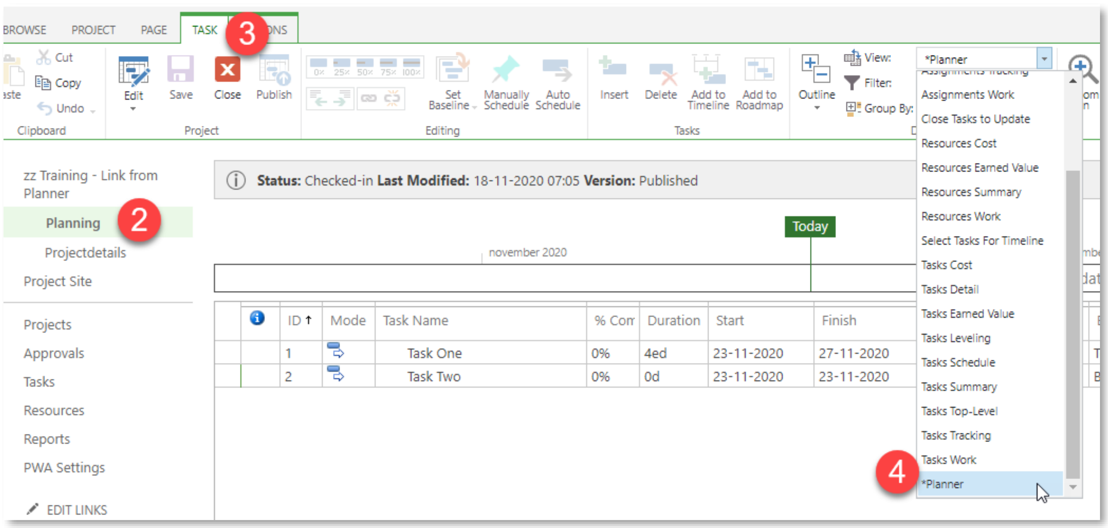
Wait 15 minutes for the Sync Engine to create a Project Online Project from the Planner Plan. This is the necessary amount of time for the sync to complete.

Connect to Project Online and navigate to Project Center to view newly created Project Online project.

1. Browse the list of Projects to find the newly created Project and click the Project Name to view the Schedule.
2. From the left quick launch navigation, click the Planning page.
   *This Project Detail Page would be created and added to an Enterprise Project Type. For the purposes of these instructions, this Enterprise Project Type is called “Planner”.
3. Click the Task ribbon.
4. Choose the ***Planner** view at the bottom of the view list *(sorted alphabetically)*
   *This is a view that would be created by an Admin in PWA Settings.

Browse the ***Planner** view to see the tasks linked with Planner.





Receiving Additional Updates from Planner

Once the project has been created, task updates will continue to sync to Project from Planner and from Project back to Planner.

Projects must be checked in for those updates to be applied.

If the project is checked out the sync tool will be unable to apply the updates to Project Online.

Project Managers must close and check in their projects when they are not actively working on their schedules.

Creating a Link from Project Online

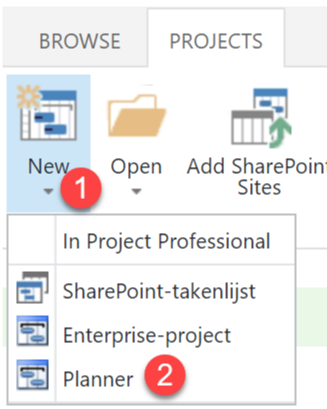
Connect to your Project Online site, Project Center

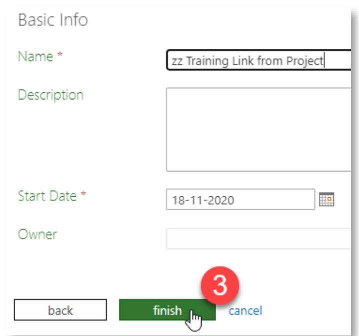
1. From the Projects ribbon, click **New.**
2. Select your project type (choose a type that includes the Planner Sync Project Detail Page).
3. Enter the project name, description, etc. on the Create a new project and click **Finish.**
4. Choose the *Planner view (step 4 under the View the Newly Created Project Online Project).
5. Enter new tasks and set the **Sync** column to “Sync” for the tasks that you want to add to the Planner Plan.

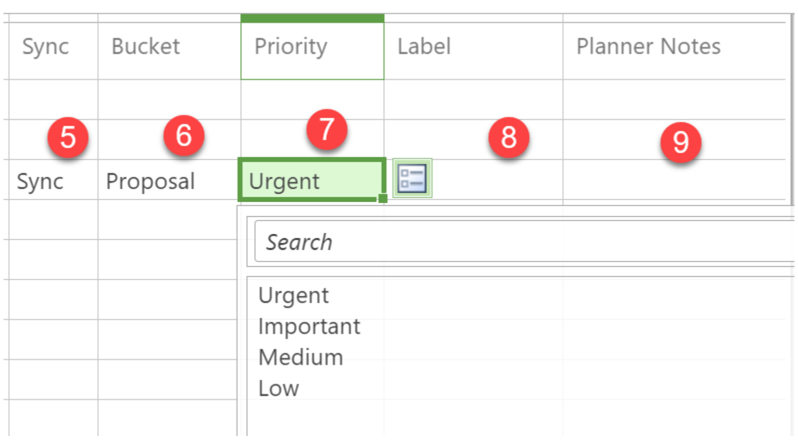
6. Enter the name of your bucket in the **Bucket** field. This is a text field.
7. Enter task **Priority**.
8. Enter the **Label.**
9. Enter the **Planner Notes.**

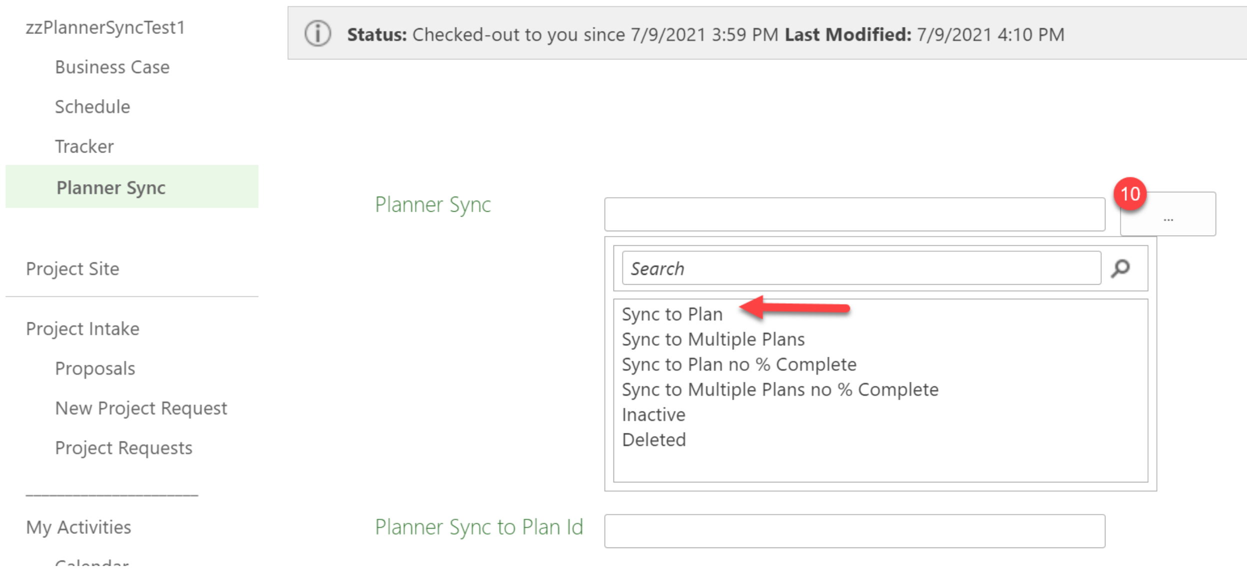
   Note**:** The Planner Notes field has a character limit of 225.
10. From the left quick launch navigation, choose the **Planner Sync** page. Set the **Planner Sync** field to “Sync by Project”.
11. From the ribbon, Save your changes.
12. Return to the Schedule page, from the Task ribbon click **Publish.**

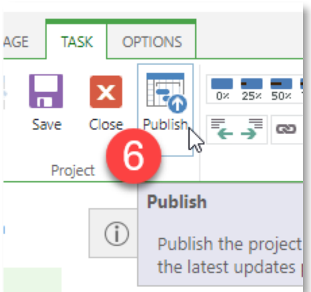
Wait 5 min for the New Planner Plan to be created











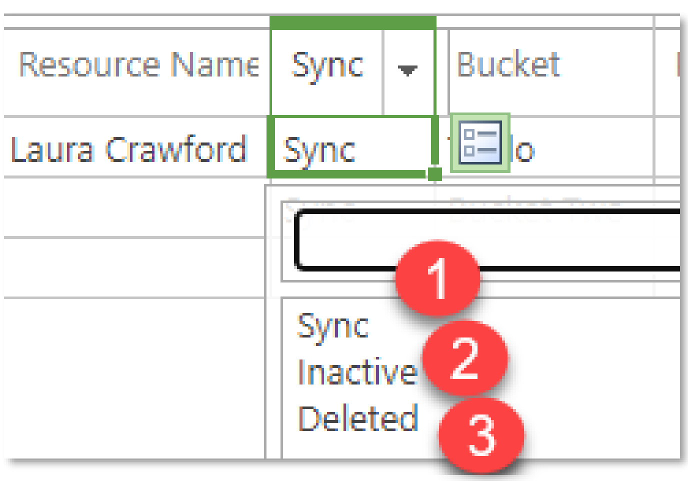
Task Sync Status

The Sync field is designed to allow users to select the tasks they wish to sync with Planner and provide a status on tasks in Planner that were set to sync.

Tasks with a Sync status will sync back and forth with Planner

Sync Status:

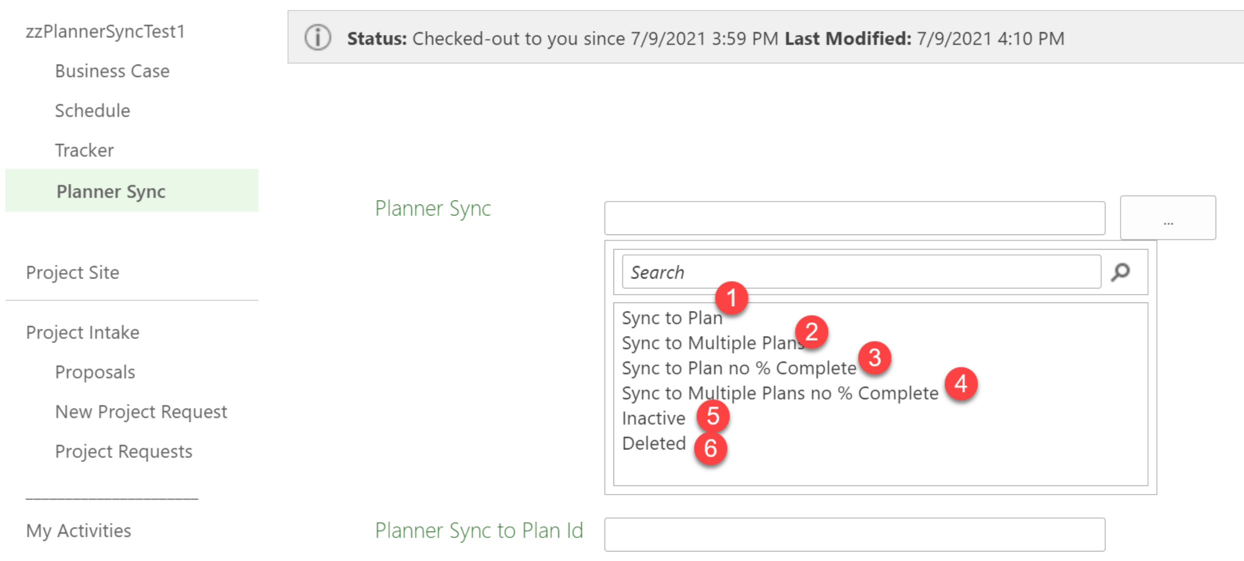
1. **Sync** – identifies tasks to sync with Planner and those that were created from Planner
2. **Inactive** – will stop the sync for that sync
3. **Deleted** – identifies task that were deleted in Planner, deleting a task in Planner does not delete the task in Project



Planner Sync Fields:

1. **Sync to Plan –** syncs the project plan with one plan in Planner

2. **Sync to Multiple Plans –** syncs the project to multiple plans in Planner, requires additional steps as the Project Manager will need to identify which plan tasks are synchronized to
3. **Sync to Plan no % Complete –** syncs tasks without marking % Complete in Project, primarily used when organizations are using timesheets and want all actuals to come from timesheets
4. **Sync to Multiple Plans no % Complete –** same as above but allows the Project Manager to sync tasks in one project to different plans in Planner.
5. **Inactive –** stops the bi-directional sync
6. **Deleted –** the plan has been deleted in Planner, deleting a plan will not delete the project or the tasks in the project



Best Practices

- Do not use special characters in a Plan or Project name
  ~ # % & * { } \ : < > ?, / " **.** (period) @ $
- Keep projects checked in when not actively working on them

FAQs

Link to FAQs: [Project to Planner Sync Archives | PPM Works, Inc.]

Installation Instructions

There are three main steps needed to get started with the Project-Planner Sync Tool:

1) Provision a Project Online site (or you can use the one you already have!)
2) Create an Azure AD account to be used by Sync Service. This account will be used both in the created Plans and be granted Project permission.
3) Schedule a setup session with a Tenant Admin in your environment, and us!

Requirement	**Details**
Provision a Project Online Site	☐ Use the SharePoint Admin Portal to provision a **Project Online (PWA) site**, or the default {tenant}.sharepoint.com/sites/pwa site can be used

Project-Planner Sync Account	☐ Create an Azure AD Account to be used by the Sync Service to access Project Online and Microsoft Planner; when initiating Projects from Planner, users will be required to add this account to the Plan, so the account name should be easily recognizable such as "**Project-Planner Sync**" ☐ Grant the account the **Group Admin** role in your Microsoft 365 Tenant; Without this role, on each Planner Plan users will be required to complete a complex 2-minute setup process of adding the Sync Account as an Owner ☐ License the account for Microsoft Planner (**E1** or **E2**, etc.) ☐ License the account for Project Online with a **Project Plan 3** license ☐ Add the Sync Account as a **Site Collection Admin** on the Project Online (PWA) site ☐ Provide PPM Works with the Account password for support and monitoring
Schedule a Setup Session with a Tenant Admin and PPM Works	☐ Complete the checklist items above prior to this session ☐ Proposed session agenda: • Register the PPMWorks Project-Planner Sync Enterprise App - *requires Tenant Admin see below* (2 min) • Connect the Sync Account to Microsoft Planner (1 min) • Connect the Sync Account to Project Online (1 min) • Create the Project Online Enterprise Custom Fields and PWA Project View and EGT View (10 min) • Configure the Azure Logic Apps (5 min) • Sync Smoke Test (10 min) ☐ Inform the Microsoft 365 Tenant Admin that an Enterprise App titled "PPMWorks Project-Planner Sync" will be granted the following scopes on your tenant. Due to Microsoft's high security layers, this is a validation step needed to allow the existing permissions for the Sync Account via the Registered Enterprise App on your tenant. Note these permission scopes only **allow and do not extend** permissions assigned to the Sync Account. **Microsoft Groups** • Read all users' full profiles • Sign you in and read your profile • Read all groups • Read and write all groups • Read group memberships • Read and write group memberships • Sign in as you • View your basic profile • Maintain access to data you have given it access to **SharePoint/Project Online** • Have full control of all site collections

	• Read and write items and lists in all site collections • Read items in all site collections • Read and write items in all site collections • Read user project enterprise resources • Read and write user project enterprise resources • Read user projects • Read and write user projects • Have full control of all ProjectWebApp site collections • Run search queries • Submit project task status updates