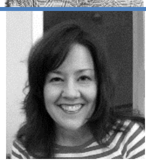
Congratulations, you, and your organization are close to leveraging the PPM Works Project-Planner Sync Solution. We are excited to get started together. This document includes PPM Works contact information and the details steps to get you started. You will need to complete steps 1-4 before scheduling your Setup Session with PPM Works. One of our Specialist will reach out to you for introductions if they have not already done so.

Meet your PPM Works Project to Planner Solution Team

	**PPM Specialist** Jeremy Satterly (502) 548-6765 Jeremy.Satterly@ppmworks.com		**Support Lead** Kiran Khanvilkar (888)858-3060 ext. 7 Kiran.Khanvilkar@ppmworks.com
	**Sr PPM Specialist** Jenny Ward (401) 744-5492 Jenny.Ward@ppmworks.com		**Director of Delivery** Scott Clausen (510) 459-0097 Scott.Clausen@ppmworks.com

Before you start – what you should know:

- What is an Azure Managed App? It is a click-to-market third-party app that is purchased and deployed through the Azure Marketplace.
- Helpful roles to complete the set-up: The assistance of one of your Microsoft Tenant Administrators at your organization will be needed to complete the configuration.
- Check the **PPM Works FAQS** for any additional questions.

Project-Planner Sync - Getting Started Checklist

Step #	Requirement	Details
1	**Create/Identify Azure Subscription**	☐ Create an Azure Subscription or identify an existing Subscription (this will be used to pay the monthly Azure Resource fees and licenses)
2	**Install the App from the Azure Marketplace**	☐ Sign-into Azure with an Account that has Owner permission to the Azure Subscription created above ☐ Click this link (Project Planner Sync) and click the **GET IT NOW** button and continue as prompted ☐ **(OR)** search the Azure Marketplace for the 'Project Planner Sync' offer and click the **CREATE** ☐ Enter the following fields: • Subscription: Azure Subscription created above

		• Resource Group: rg-ppmwApps (or similar) • Region: Choose the region closest to the primary address used when registering your organization for Office 365 • Application prefix name: <keep default> (or similar, no more than 8 characters) • Managed Resource Group: <keep default> ☐ Click **Review + Create** ☐ Read and agree to the terms ☐ Click **Create**
3	**Provision a Project Online Site** *Skip this step if you already have your Project Online site provisioned*	☐ If you have Project Online licenses in you organization, Microsoft has already provisioned a default Project Online site at: {tenant}.sharepoint.com/sites/pwa ☐ **(OR)** If you do not want to use the default Project Online site ☐ Use the SharePoint Admin Portal to provision a new **Project Online (PWA) site**
4	**Project-Planner Sync Account**	**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**" **Product Licenses**: ☐ License the account for Microsoft Planner (**E1** or **E2**, M365 Standard, etc.) ☐ License the account for Project Online with a **Project Plan 3** license **Permissions:** ☐ Grant the account the **Groups Admin** role in your Microsoft 365 Tenant; Important note - without this role, on each new Planner Plan the Owner will be required to complete a *complex* 2-minute setup process of adding the Sync Account as an Owner ☐ Add the Sync Account as a **Site Collection Admin** on the Project Online (PWA) site ☐ Create a PAW user account for the Sync Account and add it to the **Administrators** group.

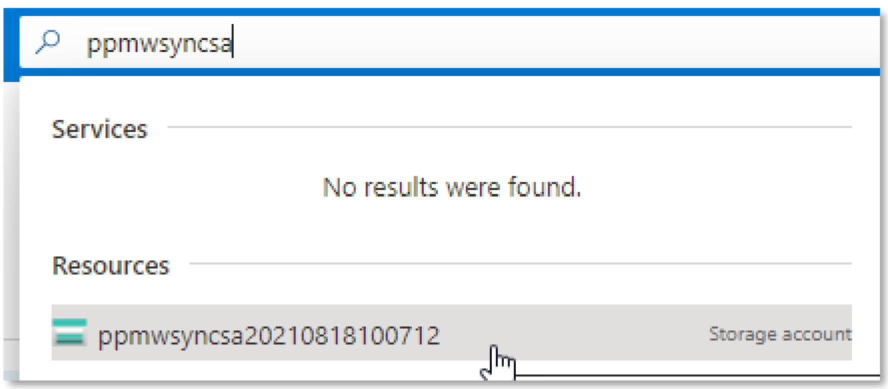
	Confirm Steps 1-4 have been completed	☐ **Checklist items 1-4 must be completed prior to Step 5 (Scheduling a setup session with PPM Works)**
5	**Schedule a Setup Session with a Tenant Admin and PPM Works**	☐ Proposed session agenda: • Register the PPMWorks Project-Planner Sync Enterprise App - *requires Tenant Admin see below* (1 min) • Configure the initial App settings (5 min) • Create the Project Online Enterprise Custom Fields, PWA Project View and EGT View (15 min) • Sync Smoke Test (10 min) ☐ Inform your Microsoft Tenant Admin that a Microsoft Enterprise App titled "PPM Works Sync" will be granted the following scopes on your tenant Important note – these "delegated" permission scopes only **allow and do not extend** permissions assigned to the Sync Account: **Microsoft Graph** • Read and write group memberships • Read and write all groups • Read all users' full profiles • Sign in and read user profile **SharePoint/Project Online** • Submit project task status updates • Read and write user project enterprise resources • Read user project enterprise resources • Read and write user projects • Read user projects • Have full control of all ProjectWebApp site collections • Run search queries as a user • Read items in all site collections **Dynamics CRM (for Project for the web)** • Access Common Data Service as organization users

ACCESSING THE SYNC APP ADMIN PORTAL

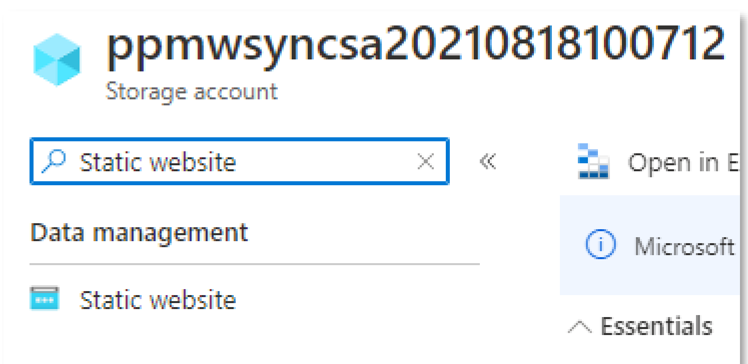
Once you have completed checklist steps 1-4 you can proceed by using the Admin Portal to register the App and begin configuration. Because the App installs on your organizations Azure Tenant, the Admin Portal URL is unique to your organization.

Request your Admin Portal URL from PPM Works or have an Azure Administrator follow these steps to identify your Admin Portal URL:

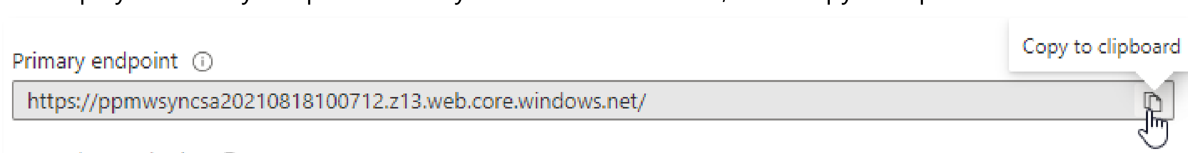
1. As an Azure Administrator, open https://portal.azure.com
2. On the top search bar, search for a Storage Account beginning with "ppmwsyncsa"



3. Click on the Storage Account resource beginning with "ppmwsyncsa"
4. On the Storage Account page, search for and select "Static website"



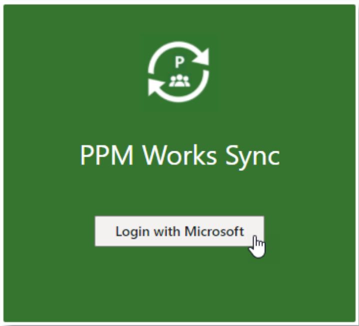
5. The displayed Primary endpoint URL is your Admin Portal URL, click Copy to clipboard



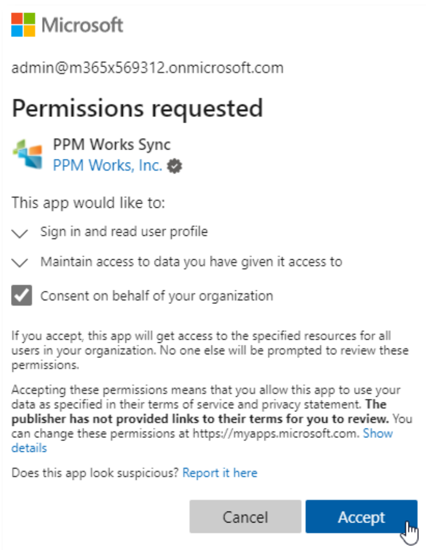
REGISTERING THE SYNC APP

Note: Microsoft 365 Tenant Administrator permissions are required to register the Sync App

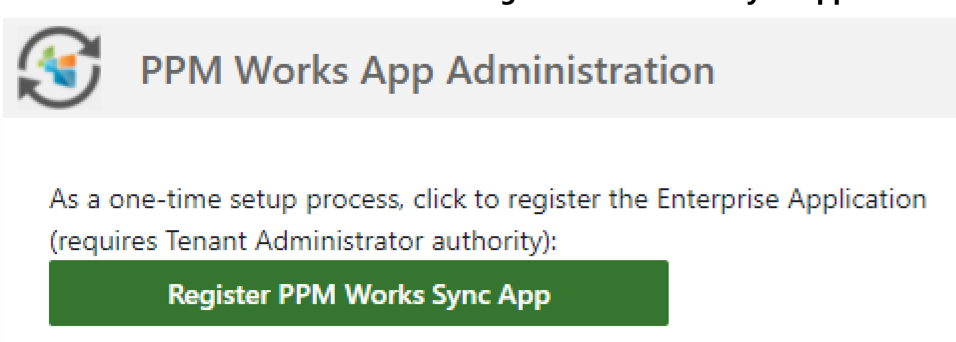
1. As a M365 Tenant Administrator, open the Admin Portal URL (see above)
2. Click **Login with Microsoft**



3. The first time connecting you will be prompted to allow the App to read your user profile, check Consent on behalf of your organization, click **Accept**

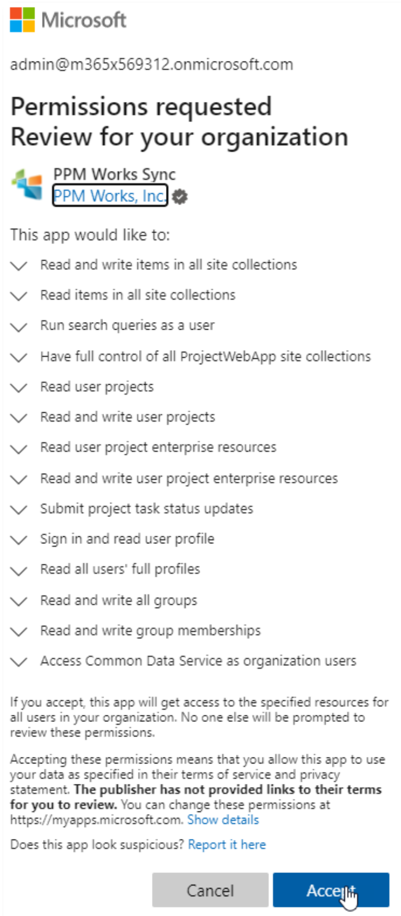


4. Wait for the Register PPM Works Sync App popup to open. If it doesn't open, in the upper-right, choose the Add Tenant select box. Click **Register PPM Works Sync App**.

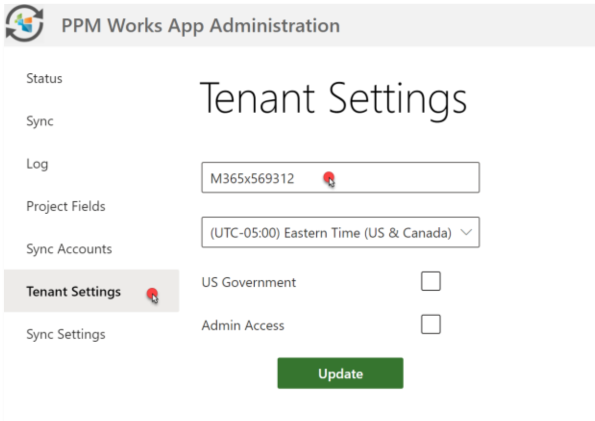


5. Important – when prompted, be sure to sign-in with a M365 Tenant Admin Account
6. Click **Accept**

   Note: These "delegated" permission scopes are required for reading and writing data between Project Online, Planner and Project for the web. The App delegates as the Sync Account user and only has the permission of the Sync Account user.



7. On the left navigation, click **Tenant Settings**
8. The tenant is initially named with your Organization ID, change the Tenant name to your organization name
   a. Set your Timezone
   b. **US Government:** Only check for Microsoft Gov Cloud (.us) Tenants
   c. **Admin Access:** Future feature (currently not available)

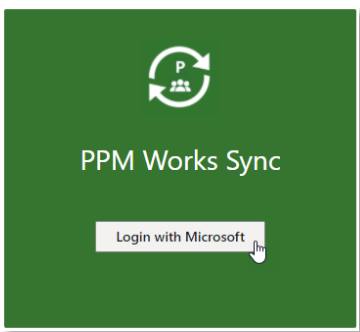


9. Click **Update**

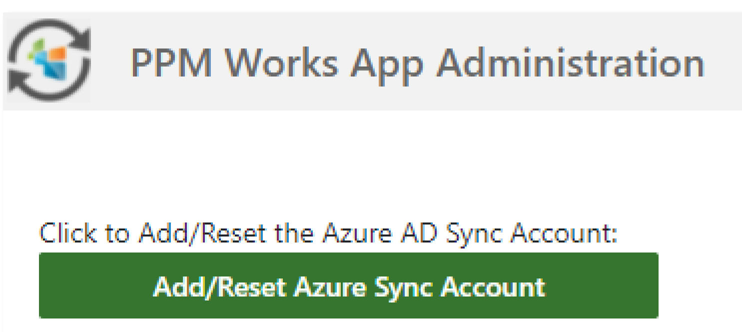
REGISTERING THE SYNC ACCOUNT

The remaining configuration does not require a Microsoft 356 Tenant Administrator

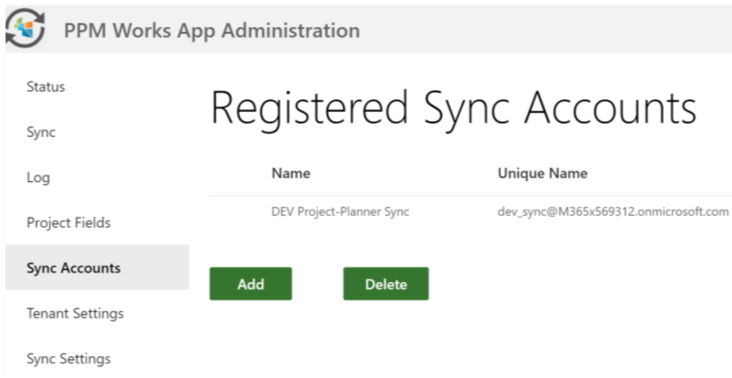
1. Open the Admin Portal URL (see above)
2. The first time connecting, click Login with Microsoft



3. On the left navigation, click **Sync Accounts**
4. Click Add
5. Click **Add/Reset Azure Sync Account**

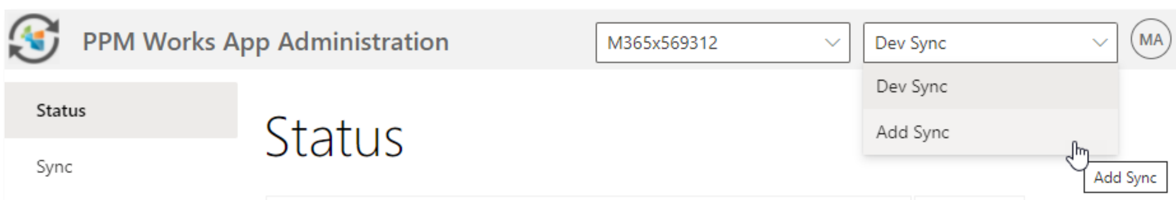


6. You will be prompted to add the credentials for the sync account (previously created in [Step 4: Project-Planner Sync Account of the Getting Started Checklist above).](#) Once the sync account has been signed in you will see the account listed in the screenshot above.

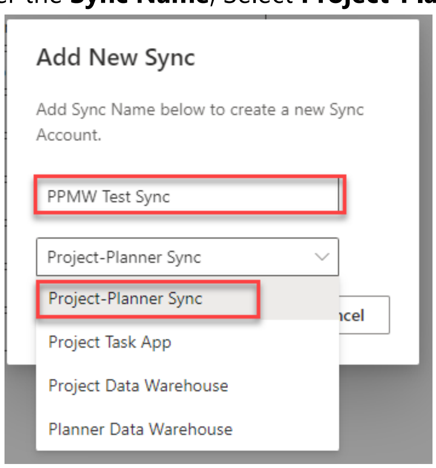


ADDING A SYNC

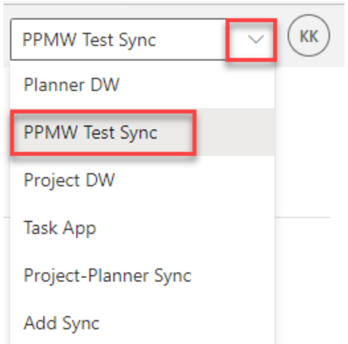
1. Open the Admin Portal URL (see above)
2. In the upper-right, select **Add Sync**



3. Enter the **Sync Name**, Select **Project-Planner Sync** as Sync Type and click **Save**.

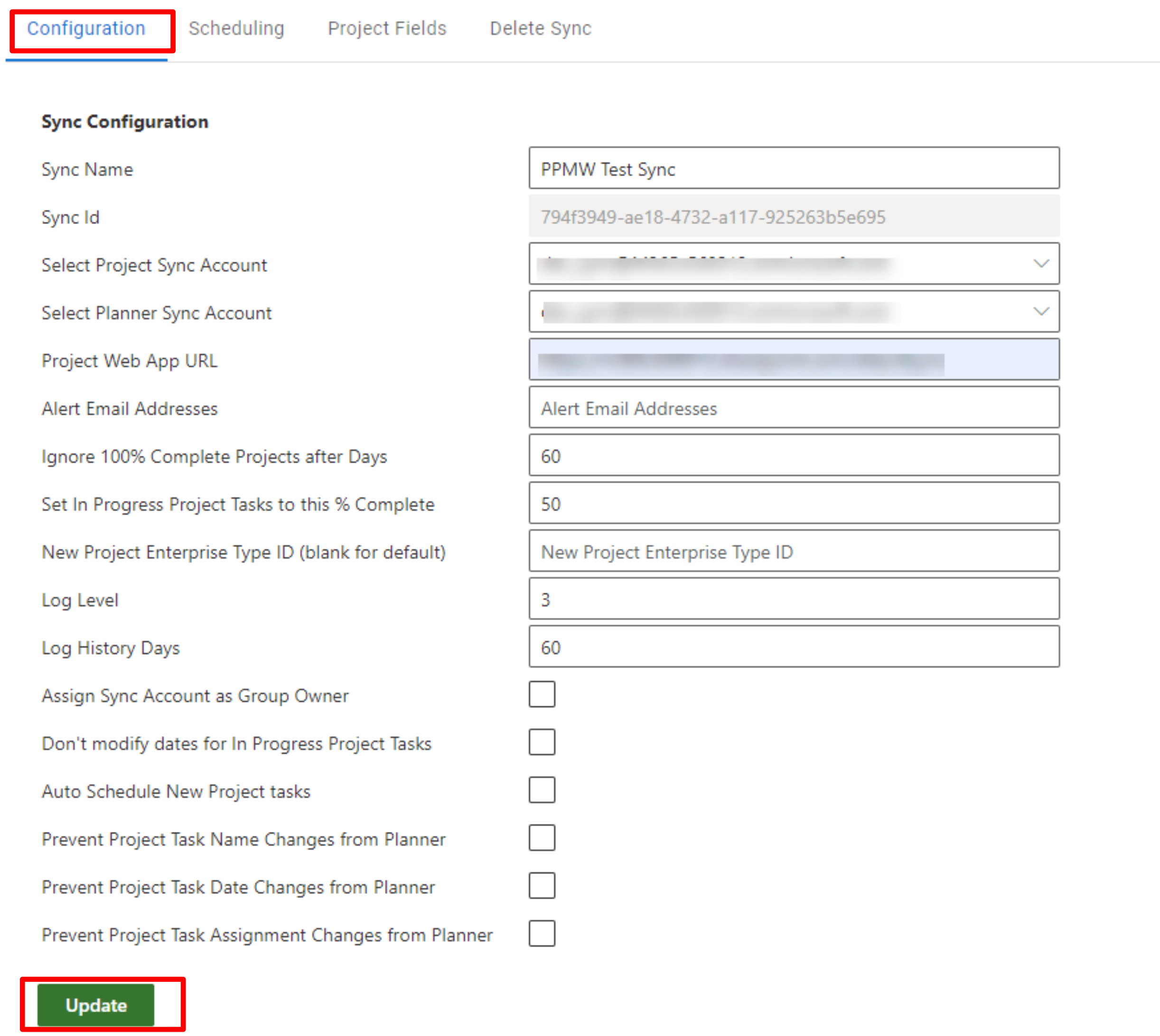


4. Click on Sync Name drop down list and select the newly created Sync.



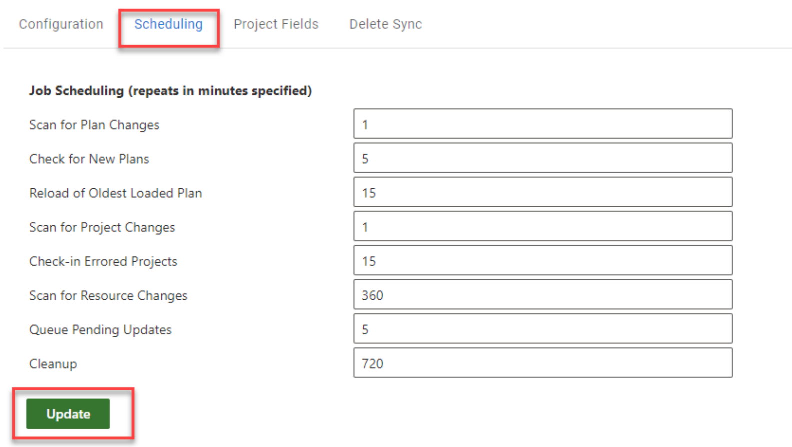
CONFIGURE SYNC SETTING

5. Navigate to Sync Settings page and select configuration tab.
    - Select the **Project Sync Account**.
    - Select the **Planner Sync Account**.
    - Copy and Paste the PWA URL in the **Project Web App URL** field.
    - Leave the default settings as is in the **Sync Configuration** table.
    - Click **Update**.



CONFIGURE JOB SCHEDULING

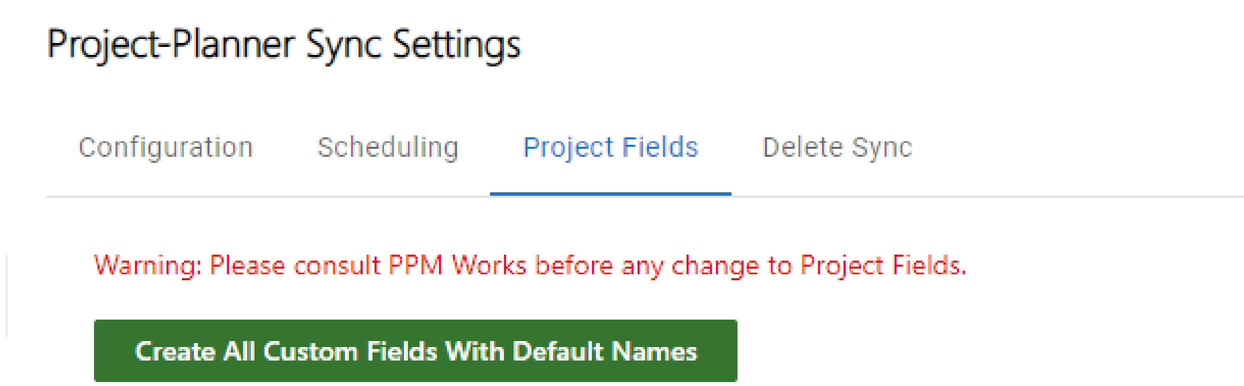
6. Click on the Scheduling Tab. You can specify how frequently you want to run the scheduling jobs (in minutes). Below are the default settings. Click on update button.



CREATING THE PROJECT FIELDS

For the Project to Planner Sync to work, the tool needs project fields to collect the Planner data. The Admin App will allow you to create all the necessary project fields, so you do not need to manually create them in Microsoft Project Online.

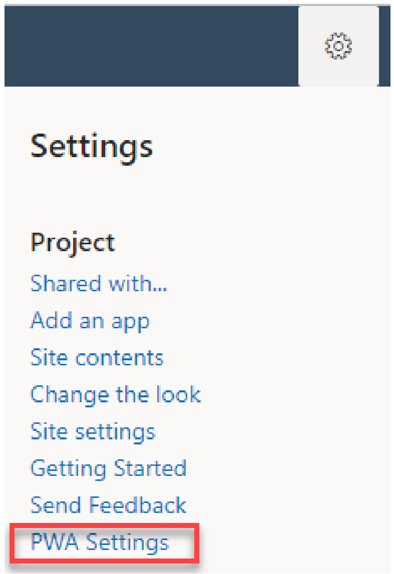
6. Click on **Project Fields** Tab. PPM Works recommends leaving the default names as is for the newly created custom fields. Click **Create All Custom Fields with Default Names** for the custom fields to be created for your organization.



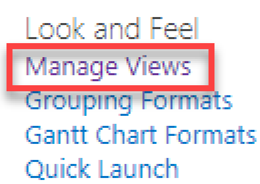
CREATING PLANNER SYNC VIEWS

7. The PWA Admin needs to complete the following configuration:
    - **Custom Views:** Create the custom views that contain the Task sync fields in PWA and the Enterprise Global Template for Project Managers.
        i. Login to PWA

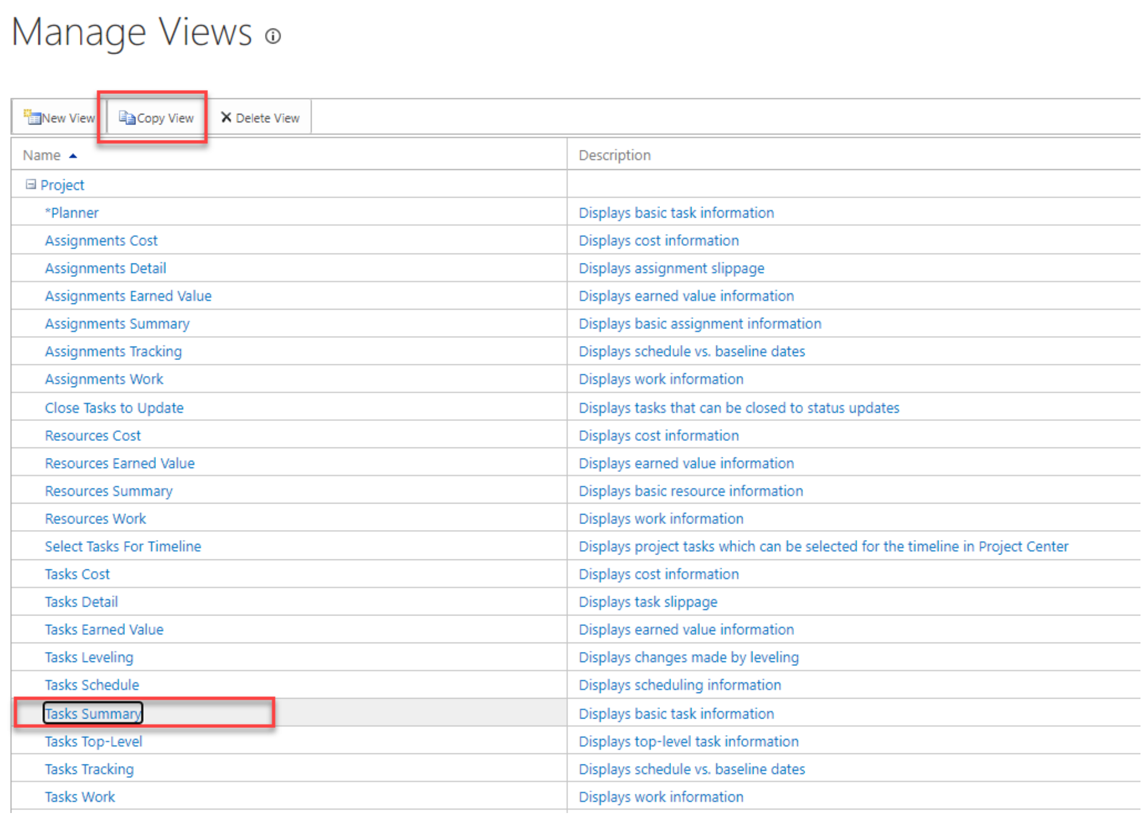
ii. Click on Settings à **PWA Settings**



iii. Click on **Manage Views**



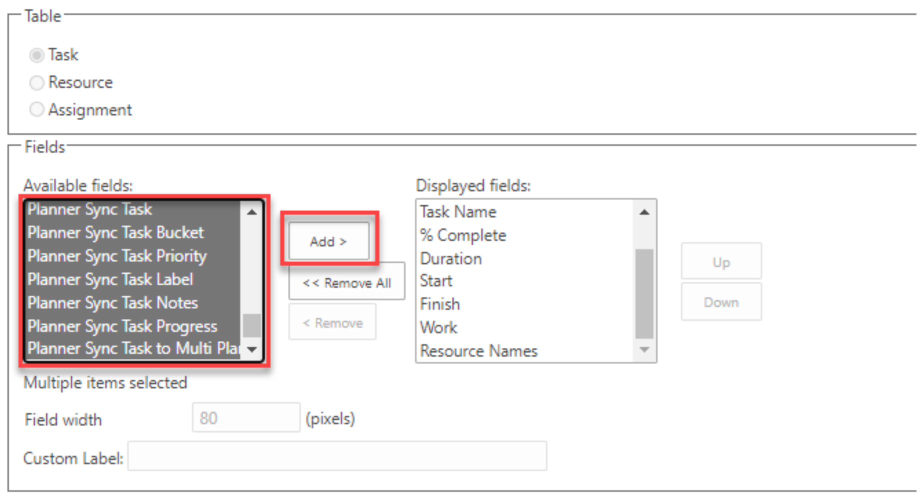
iv. Create a copy of the existing Task Summary view. Select the **Task Summary** row (by clicking next to the words Task Summary and create a copy by clicking on the **Copy View** button on the ribbon.



v. Enter the View Name "*Planner View"

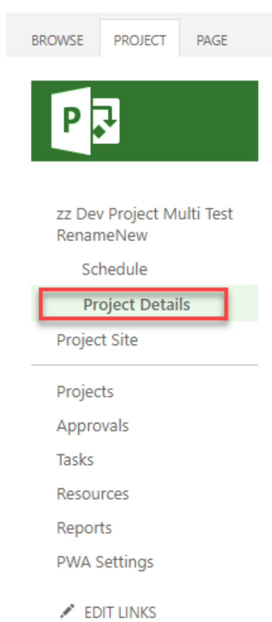
vi. Select the Planner Sync Fields from the "Available Fields" section (on the left) and add them to "Displayed Fields" section

1. Planner Sync Task
2. Planner Sync Task Bucket
3. Planner Sync Task Priority
4. Planner Sync Task Label
5. Planner Sync Task Notes
6. Planner Sync Task Progress
7. Planner Sync Task to Multi Plan Id
8. Planner Sync Task Id

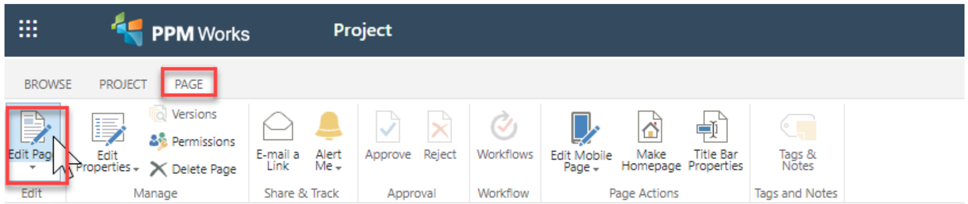


vii. Click the **Save** button.

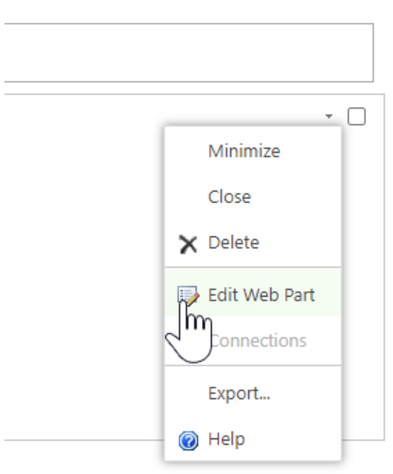
- **Add the Project sync fields to a Project Detail Page**.
   i. Open any existing project in PWA.
   ii. Click on **Project Details** PDP in the left navigation.



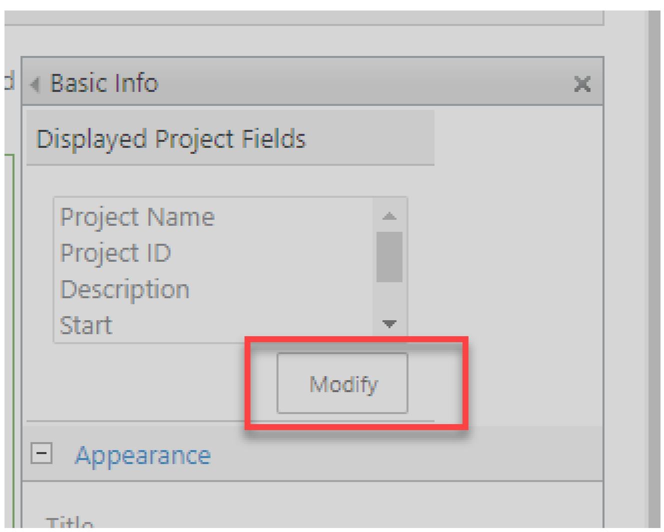
   iii. Click on Page à Edit Page.



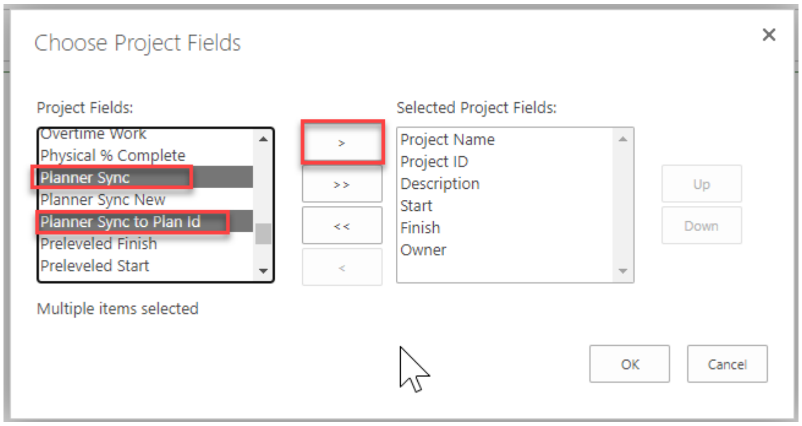
iv. Edit the Web Part. Click on the **Edit Web Part** option.



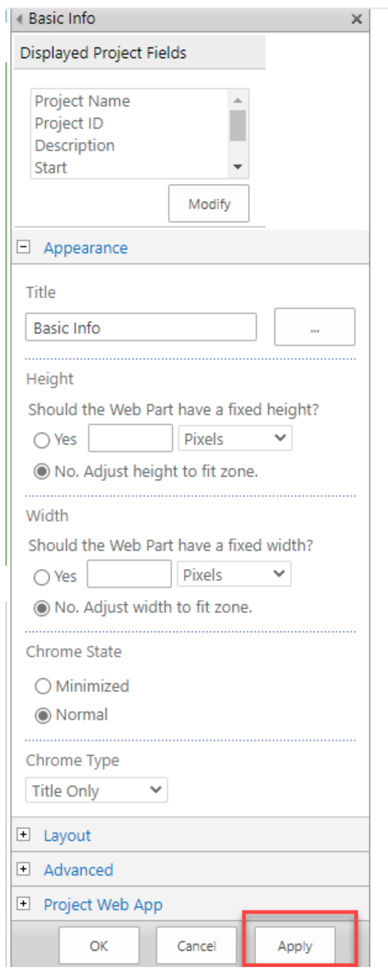
v. Click the **Modify** button under **Displayed Project Fields** section



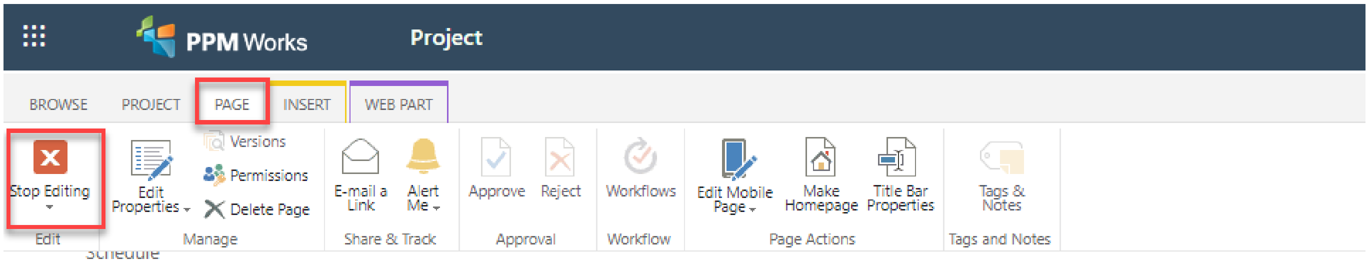
vi. Select the **Planner Sync** and the **Planner Sync to Plan Id** fields and click on Add button to add the project fields to the view, click the **OK** button



vii. Click on **Apply** button



viii. Click on Page Menu and select Stop Editing.


PPM Works
Project
BROWSE
PROJECT
PAGE
INSERT
WEB PART
Stop Editing
Edit
Edit Properties
Versions
Permissions
Delete Page
Manage
E-mail a Link
Alert Me
Share & Track
Approve
Reject
Approval
Workflows
Workflow
Edit Mobile Page
Make Homepage
Title Bar Properties
Page Actions
Tags & Notes
Tags and Notes