

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 <u>Azure</u> with an Account that has Owner permission to the Azure Subscription created above Click this link (<u>Project Planner Sync</u>) and click the GET IT |
| | | □ (OR) search the Azure Marketplace for the 'Project Planner |
| | | □ 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)</keep> Managed Resource Group: <keep default=""></keep> Click Review + Create | |
|---|---|---|--|
| | | 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 <u>SharePoint Admin Portal</u> to <u>provision a new</u> | |
| | | Project Online (PWA) site | |
| 4 | 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" | |
| | | 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 <i>complex</i> 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"

| ₽ ppmwsyncsa | |
|--------------------------|-----------------|
| Services | |
| No results were found. | |
| | |
| Resources | |
| ppmwsyncsa20210818100712 | Storage account |

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

| ppmwsyncsa20210818100712 Storage account | | |
|---|-------------|--|
| ${\cal P}$ Static website \times « | 🔒 Open in E | |
| Data management | i Microsoft | |
| 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)



| PPM Works A | pp Administration |
|-----------------------|---|
| Status Sync | Tenant Settings |
| Log Project Fields | M365x569312 € (UTC-05:00) Eastern Time (US & Canada) ∨ |
| Tenant Settings | US Government |
| Sync Settings | Admin Access |
| | Update |

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



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



| PPM Works App Administration | | |
|------------------------------|--------------------------|--------------------------------------|
| Status Sync | Registered S | Sync Accounts |
| Log | Name | Unique Name |
| Project Fields | DEV Project-Planner Sync | dev_sync@M365x569312.onmicrosoft.com |
| Sync Accounts | Add Delete | |
| Tenant Settings | | |
| Sync Settings | | |

ADDING A SYNC

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

| 🞯 PPM Works Ap | pp Administration | M365x569312 ~ | Dev Sync | ~ (MA) |
|----------------|-------------------|---------------|----------|----------|
| Chature | | | Dev Sync | |
| Status | Status | | Add Sync | |
| Sync | Julus | | < | Add Sync |

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

| Add New S | Add New Sync | | |
|---|--------------|--|--|
| Add Sync Name below to create a new Sync Account. | | | |
| PPMW Test Syn | c | | |
| Project-Planner | Sync 🗸 | | |
| Project-Planner | Sync | | |
| Project Task Ap | p | | |
| Project Data W | arehouse | | |
| Planner Data W | 'arehouse | | |

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



| PPMW Test Sync | КК |
|----------------------|----|
| Planner DW | _ |
| PPMW Test Sync | |
| Project DW | |
| Task App | |
| Project-Planner Sync | |
| Add 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**.



| Configuration Scheduling Project Fields De | elete Sync |
|--|---------------------------------------|
| Sync Configuration | |
| Sync Name | PPMW Test Sync |
| Sync Id | 794f3949-ae18-4732-a117-925263b5e695 |
| Select Project Sync Account | · · · · · · · · · · · · · · · · · · · |
| Select Planner Sync Account | (|
| Project Web App URL | |
| Alert Email Addresses | Alert Email Addresses |
| Ignore 100% Complete Projects after Days | 60 |
| Set In Progress Project Tasks to this % Complete | 50 |
| New Project Enterprise Type ID (blank for default) | New Project Enterprise Type ID |
| Log Level | 3 |
| Log History Days | 60 |
| Assign Sync Account as Group Owner | |
| Don't modify dates for In Progress Project Tasks | |
| Auto Schedule New Project tasks | |
| Prevent Project Task Name Changes from Planner | |
| Prevent Project Task Date Changes from Planner | |
| Prevent Project Task Assignment Changes from Planner | |
| | |

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.



Update

| Configuration | Scheduling | Project Fields | Delete Sync |
|---------------------------|-------------------|-----------------|-------------|
| Job Schedulin | g (repeats in mir | utes specified) | |
| Scan for Plan C | hanges | | 1 |
| Check for New | Plans | | 5 |
| Reload of Olde | st Loaded Plan | | 15 |
| Scan for Project Changes | | | 1 |
| Check-in Errored Projects | | | 15 |
| Scan for Resource Changes | | | 360 |
| Queue Pending Updates | | | 5 |
| Cleanup | | | 720 |
| | _ | | |

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.



Manage Views 🛛

| New View Copy View X Delete View | | | | |
|----------------------------------|---|--|--|--|
| Name 🔺 | Description | | | |
| Project | | | | |
| *Planner | Displays basic task information | | | |
| Assignments Cost | Displays cost information | | | |
| Assignments Detail | Displays assignment slippage | | | |
| Assignments Earned Value | Displays earned value information | | | |
| Assignments Summary | Displays basic assignment information | | | |
| Assignments Tracking | Displays schedule vs. baseline dates | | | |
| Assignments Work | Displays work information | | | |
| Close Tasks to Update | Displays tasks that can be closed to status updates | | | |
| Resources Cost | Displays cost information | | | |
| Resources Earned Value | Displays earned value information | | | |
| Resources Summary | Displays basic resource information | | | |
| Resources Work | Displays work information | | | |
| Select Tasks For Timeline | Displays project tasks which can be selected for the timeline in Project Center | | | |
| Tasks Cost | Displays cost information | | | |
| Tasks Detail | Displays task slippage | | | |
| Tasks Earned Value | Displays earned value information | | | |
| Tasks Leveling | Displays changes made by leveling | | | |
| Tasks Schedule | Displays scheduling information | | | |
| Tasks Summary | Displays basic task information | | | |
| Tasks Top-Level | Displays top-level task information | | | |
| Tasks Tracking | Displays schedule vs. baseline dates | | | |
| Tasks Work | Displays work information | | | |

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



| Table Task Resource Assignment Fields | | | | | | |
|--|--------------|---|--|---|------------|--|
| Available fields: Planner Sync Task Planner Sync Task Bucket Planner Sync Task Priority Planner Sync Task Label Planner Sync Task Notes Planner Sync Task to Mult Multiple items selected | ss ti Pla | Id > Id > Remove All Task N % Con Durati Start Finish Work Resou | red fields: lame nplete on rce Names | • | Up Down | |
| Field width 8 Custom Label: | 30 (pi | xels) | | | | |

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.

| BROWSE | PROJECT | PAGE |
|--|--|-----------|
| Ρ | ļ | |
| zz Dev Renam Scł | r Project M neNew hedule | ulti Test |
| Pro | oject Detai | ls |
| | | |
| Projec | t Site | |
| Projec Projec | t Site ts | |
| Projec Projec Appro | t Site ts vals | |
| Projec Projec Appro Tasks | t Site ts vals | |
| Projec Projec Appro Tasks Resou | t Site ts vals rces | |
| Projec Projec Appro Tasks Resou Report | t Site ts vals rces ts | |
| Projec Projec Appro Tasks Resou Report PWA S | t Site ts vals rces ts Settings | |

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



| Choose Project Fields | | × |
|--|--|------|
| Project Fields: Overtime Work Physical % Complete Planner Sync Planner Sync to Plan Id Preleveled Finish Preleveled Start Multiple items selected | Selected Project Fields: Project Name Project ID Description Start Start Gowner | |
| | Саг | ncel |

vii. Click on **Apply** button

| Project Name Project ID Description Start Appearance itle Basic Info deight Should the Web Part hav Ves No. Adjust height to Vidth Should the Web Part hav Vidth Should the Web Part hav Vidth Should the Web Part hav No. Adjust width to f Chrome State Minimized Normal | podify e a fixe e a fixe e a fixe | ed width | nt? |
|--|--|--|---------------|
| Appearance ittle Basic Info Height Should the Web Part hav Vidth No. Adjust height to Vidth Should the Web Part hav Vidth No. Adjust width to f Chrome State Minimized Normal Normal | e a fixe els fit zone e a fixe | ed heigh ed width ed width | |
| Appearance itile Basic Info Height Should the Web Part hav O Yes Pix No. Adjust height to Vidth Should the Web Part hav O Yes Pix No. Adjust width to f Chrome State O Minimized Normal | e a fixe els fit zone e a fixe | ed heigh | |
| ittle Basic Info Height Should the Web Part hav Yes No. Adjust height to Vidth Should the Web Part hav Yes No. Adjust width to f Chrome State Minimized Normal Throme Type | e a fixe els fit zone e a fixe | ed heigh v e. ed width v | |
| Basic Info Height Should the Web Part hav Yes Pib No. Adjust height to Vidth Should the Web Part hav Yes Pix No. Adjust width to f Chrome State Normal Normal | e a fixe els fit zone e a fixe | ed heigh ed heigh ed width ed width | it? i? |
| Height Should the Web Part hav Yes Pin No. Adjust height to Vidth Should the Web Part hav Yes Pin No. Adjust width to f Chrome State Minimized Normal | e a fixe els fit zone e a fixe | ed heigh e. ed width | it? 1? |
| Should the Web Part hav Ves Piz No. Adjust height to Vidth Should the Web Part hav Ves Piz No. Adjust width to f Chrome State Minimized Normal | e a fixe els fit zone e a fixe | ed heigh | 1t? 1? |
| Ves Pib No. Adjust height to Vidth Should the Web Part hav Ves Pix No. Adjust width to f Chrome State Ninimized Normal Chrome Type | iels fit zone e a fixe | ✓ ed width ✓ | 1? |
| No. Adjust height to Vidth Should the Web Part hav Ves Pix No. Adjust width to f Chrome State Minimized Normal Throme Type | fit zone e a fixe | ed width | 1? |
| Vidth Should the Web Part hav Ves Pix No. Adjust width to f Chrome State Minimized Normal | e a fixe | ed width | 1? |
| Should the Web Part hav Ves Pix No. Adjust width to f Chrome State Minimized Normal | e a fixe | ed width | 1? |
| Ves Pix No. Adjust width to f Chrome State Ninimized Normal Chrome Type | | ~ | |
| No. Adjust width to f Chrome State Minimized Normal | els | | |
| Chrome State O Minimized Normal Chrome Type | it zone. | | |
| Minimized Normal | | | |
| Normal 'hrome Type | | | |
| hrome Type | | | |
| | | | |
| Title Only | | | |
| nue Only | | | |
| Layout | | | |
| Advanced | | | |
| Project Web App | | | |

viii. Click on Page Menu and select Stop Editing.



| | PPM Works | , Project | | | | | |
|--------------|------------------------------------|--|-------------|--------------------------------|-------------------------|-----------------|--|
| BROWSE | PROJECT PAGE INS | ERT WEB PART | | | | | |
| Stop Editing | Edit Properties + X Delete Page | E-mail a Alert Link Me + Approve Reject | t Workflows | Edit Mobile Page + Homepage | Title Bar Properties | Tags & Notes | |
| Edit | Manage | Share & Track Approval | Workflow | Page Actions | | Tags and Notes | |