

Project Online to Planner Sync

Microsoft
Partner



Gold Project and Portfolio Management
Gold Cloud Productivity
Silver Small and Midmarket Cloud Solutions
Silver Data Analytics



PPM Works



Microsoft Gold Partner

Focused on Microsoft Power Platform, Planner, Teams, and Microsoft 365



Guaranteed Results

We guarantee your success and our results – we are not done until you are a satisfied client reference



Microsoft Experts

We contributed to the Microsoft Modern Work release for the past three cycles and are a part of the Partner Advisory Council



Extensive Experience

We have performed over **450 PPM implementations** and trained thousands. Our team has delivered dozens of Industry presentations including Microsoft and PMI Conferences/Summits

Some Recent Experience



PPM Works Consulting Services

PPM Works offers a full range of Microsoft 365 consulting services, all designed to help your company reach its potential. Whether you're looking for a small tweak or complete overhaul, we have you covered. Our services are available a la carte so you can get precisely what you need.



Professional Services

We offer Microsoft 365 implementations, upgrades and mentoring. Our years of experience across all industries provide the foundation for our straight-forward team approach.



PPM Support

PPM Works understands that you may have questions or need assistance on an ongoing basis or just a few times. Regardless of your situation, PPM Works Support options are flexible and meet your needs. Choose your Support plan today and get started.



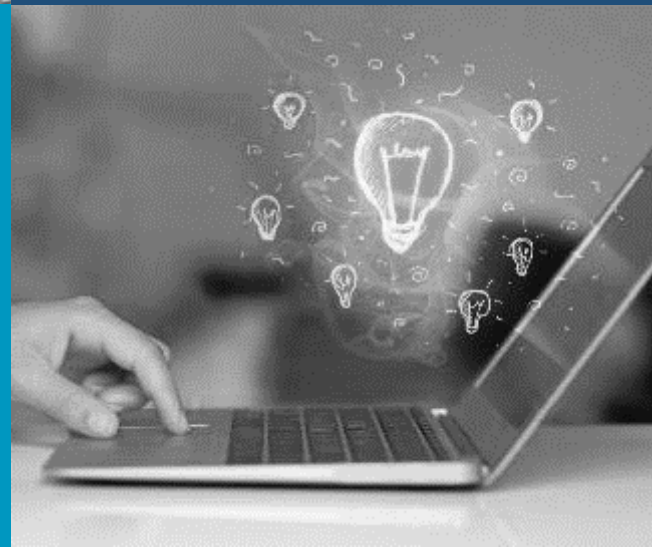
Planner & M365 Training

Our expert training has provided impactful learning for over twenty years. We believe the best learning environment provides the opportunity to understand and practice the key concepts. Let our certified expert trainers guide you to your Microsoft 365 goals.



Specialized Solutions

Each company is unique. One-size-fits-all approaches will never help your business reach its full potential. We deliver custom PPM & M365 solutions, tailored to you – your industry, your culture, your one-of-a-kind challenges.



PPM Works Services Approach



K.I.S.S.

Keep it simple for end users and limit the change to the organization. Crawl, Walk, Run.

Centralized Solution

One source for all data

Reporting

Leverage out of the box reports for simplicity

Visibility

Seeing all data in one, easy to use place

Collaboration

Leveraging collaboration best practices

Seamless Deployment

Providing better decision making and future needs

Project to Planner Integration Tool

Allows your team to use Planner for task management while managing the execution in Project Online. Provide visibility to your executives through your bi-directional synchronization to/from Project Online and Planner.

Automatically provide updates on project progress and tasks status completion through Planner using Microsoft Azure Managed Apps.



Benefits



Reduce Costs

Save on Project Online licenses by utilizing Planner



Portfolio Visibility

See all your project updates and tasks status completion in one location



Automate work

Get rid of manual status reporting by automatically pushing the main project updates



Collaborate Seamlessly

Keep your team updated on priorities from Project Online across teams

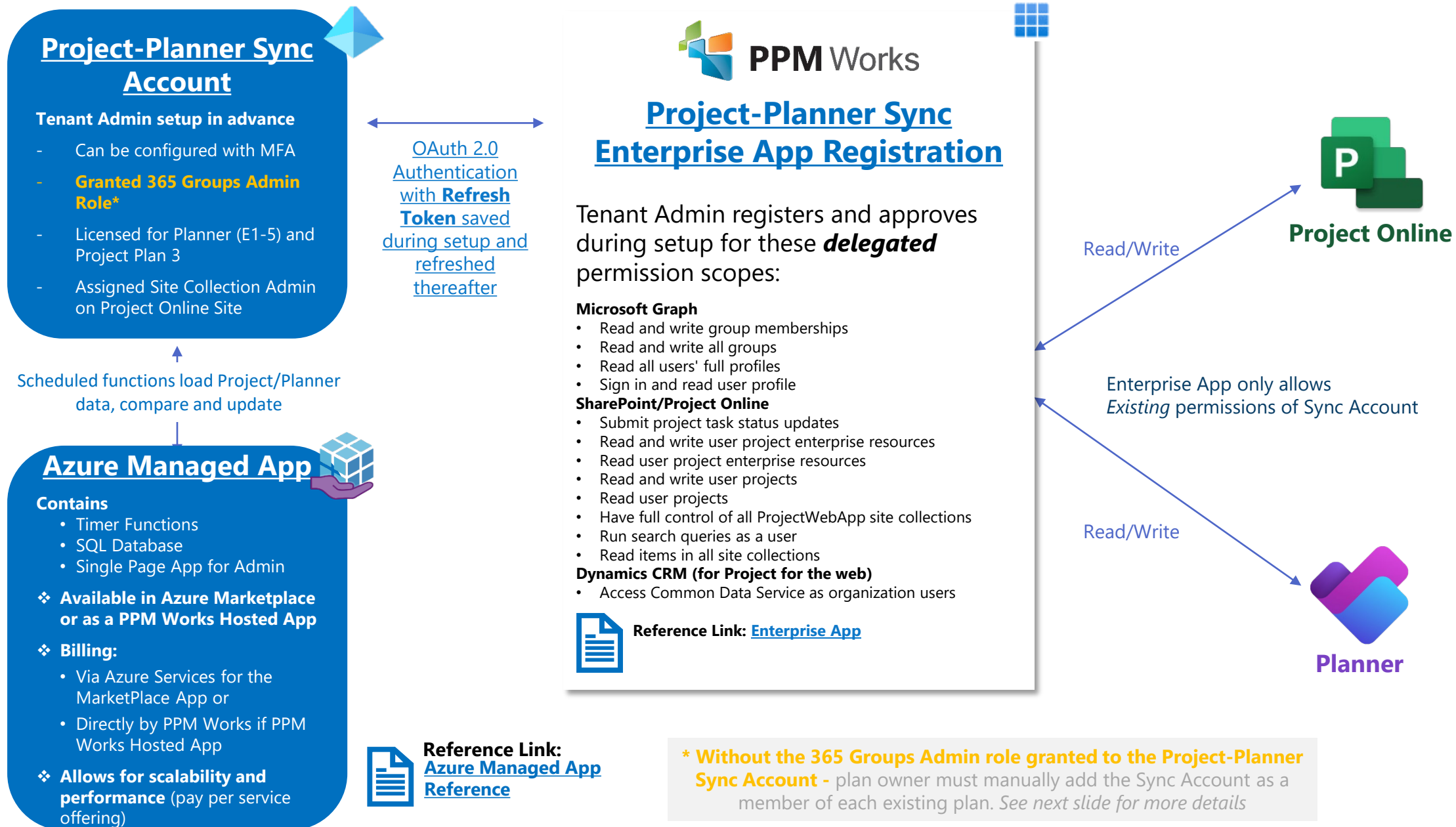
Project to Planner Sync Features

Tool Feature	Available Now	Future Phase	Not Available
All data stored in your Azure Tenant	✓		
Select which projects to sync with Planner	✓		
Create a new plan in Planner from a project in Project Online	✓		
Create a new project in Project Online from a plan in Planner	✓		
Bi-directional sync of task updates from Planner to Project	✓		
Ability to select which tasks to sync to Planner from Project	✓		
Sync tasks from one Project to multiple plans in Planner	✓		
Bi-directional sync of task notes	✓		
Bi-directional sync of task bucket	✓		
Bi-directional sync of task labels	✓		
Bi-directional sync of resource assignments	✓		

Project to Planner Sync Features

Tool Feature	Available Now	Future Phase	Not Available
Sync without % Complete for organizations using timesheets	✓		
Ability to stop synchronizing tasks with Planner	✓		
Ability to stop synchronizing a project with Planner	✓		
Modern report pack using Microsoft PowerBI	✓		
Ability to check for changes in Project/Planner every 5 minutes	✓		
Ability to select which tasks in Planner sync to Project	✓		
Ability to set the task start date as the Planner created date when creating a new task from Planner	✓		
Ability to see number of Planner checklist items complete in Project			✓

Project to Planner Sync Solution Overview



Frequently Asked Questions

- Go-Live: typically within a week from contract signature
- Licensing: one tenant license allows for unlimited users
- Trials: No client-specific trials. The Azure Managed App requires setup in your environment
- Discounts: none provided
- Microsoft Licensing: We do not provide any Microsoft licensing with the tool. You purchase Microsoft 365 (Planner) and Project Plan 3 or 5 (Project Online) through Microsoft.



For a complete list of frequently asked questions check out the [PPM Works FAQs](#).

Team Roles and Responsibilities

Client Resources

Resource	Need	Responsibilities
Client Sponsor/Executives	As Needed (5%)	<ul style="list-style-type: none">• Provide high-level project direction
Project Manager	Part-Time (15%)	<ul style="list-style-type: none">• Day-to-Day PM responsibilities• Steer project; ensure deliverables are being met• Resolve priority conflicts, scope issues, etc.
Lead User(s) (key representatives from Portfolio Managers, Project/Resource Managers, and Team Members)	Part-Time (20-25%) (Focus Areas and Training)	<ul style="list-style-type: none">• Identify and approve functional requirements• Provide feedback regarding deployment planning• Validate application• Participate in training
Technical Resource/AD Admin	Minimal (2%)	<ul style="list-style-type: none">• Assistance with AD group mapping (if needed)

Team Roles and Responsibilities

PPM Works Resources for Service Effort

Resource	Need	Responsibilities
Senior PPM Consultant	Full Time	<ul style="list-style-type: none">Provides senior-level consulting in the areas of subject matter knowledge on Project Online and business process management. Provides configuration, development, and delivery of solution.
Project Manager	Part Time (10%)	<ul style="list-style-type: none">Provides schedule management and status reports and oversight of the project, coordinates the activities of the team and ensures that the project is delivered on-time and on-budget.
Trainer	Part Time (5%)	<ul style="list-style-type: none">Designs, implements, and maintains course materials with respect to end-users and administrator needsProvide real-world experience and keeps training engaged and fun
Engagement Manager Scott Clausen	Part Time; as needed	<ul style="list-style-type: none">Provide guidance and recommendations based on best practices and use of PPM Works knowledge base.Manage to close any escalated concerns or issues that may arise. Serve as escalation contact. Oversee project activities.