

# Planner & Power BI Portfolio Management

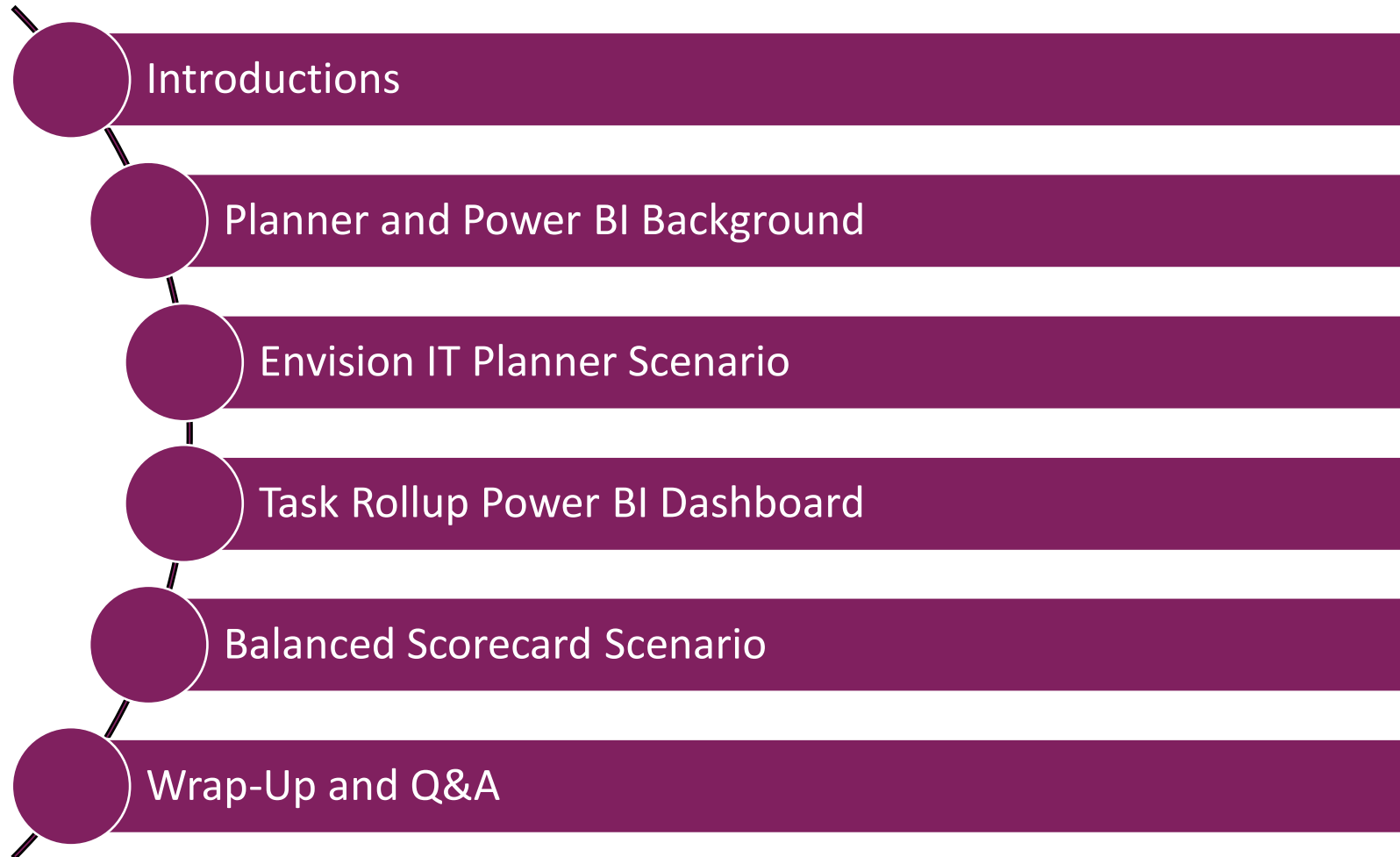
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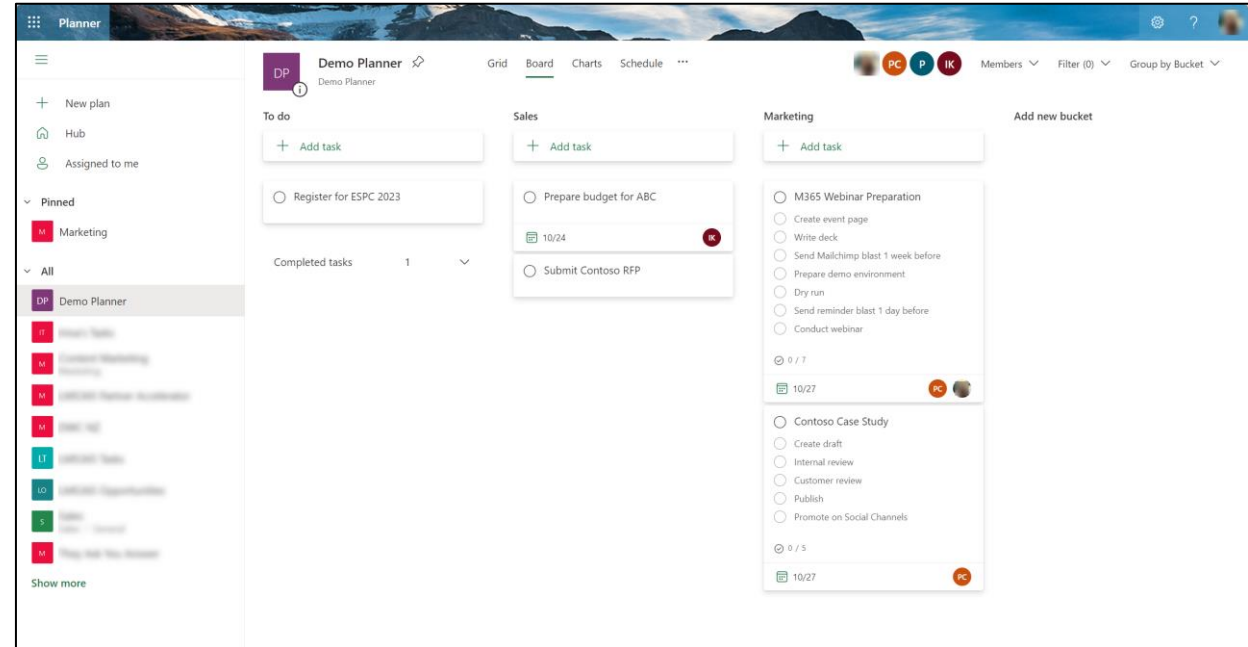


# Agenda



# Planner

- Simple task management tool
- Plan is created with each Microsoft 365 Group
- Plans consist of Buckets and Tasks
- Integrates with To-Do

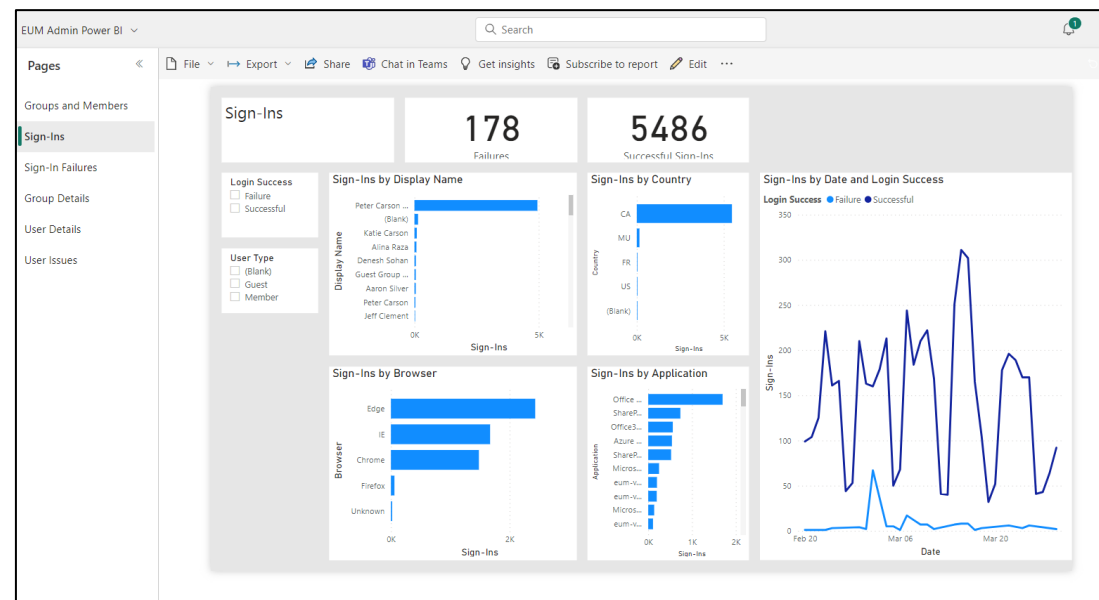


<https://products.office.com/en-us/business/task-management-software>

# Power BI



- Connect data in Excel, corporate data sources, and external services
- Design your reports in Excel or Power BI Designer
- Publish them to the web



<https://powerbi.microsoft.com>

# Power Automate

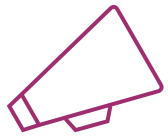


- Formerly known as Microsoft Flow
- **Automation tool:** Microsoft service that automates workflows and tasks across various apps and services
- **Integrations:** Connects to hundreds of services including Office 365, SharePoint, SQL Server, and third-party applications
- **Low-Code:** Enables users to create complex workflows regardless of programming experience
  - Comes with variety of pre-made templates for common workflows

<https://powerautomate.microsoft.com/en-us/>



# Planner Scenarios

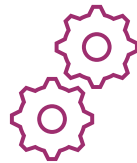


## Marketing

- Website tasks
- Content creation
- Event preparation



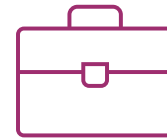
## Fiscal Planning






## Development and Consulting



## RFP Submissions



## Client Projects

 <b>M</b>	<b>EUM Website</b> Marketing	...
 <b>S</b>	<b>Sales</b> Sales > General	...
 <b>S</b>	<b>EUM RFP Sales</b> Sales	...

# OOTB Planner Challenges



Challenging to get a single view of all tasks between plans



Limited visuals within Planner itself



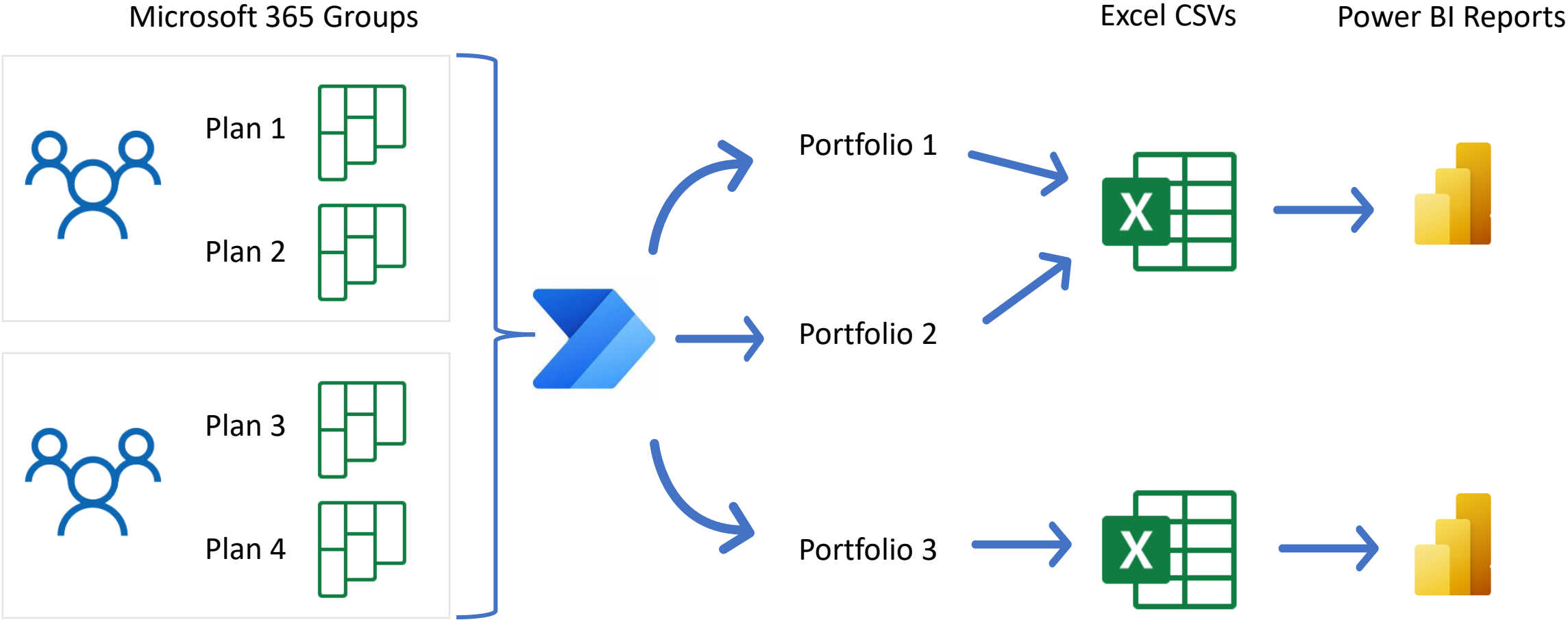
Labeling has limited uses



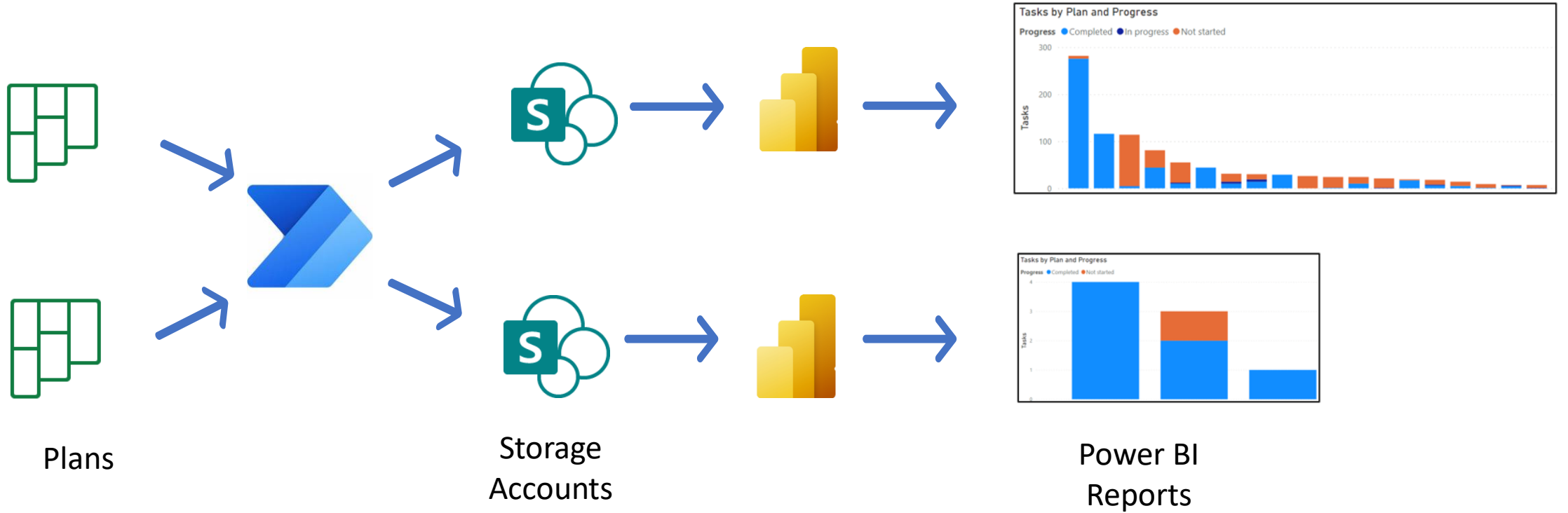
Users shouldn't have access to all plans within the organization  
ie. Management Portfolio

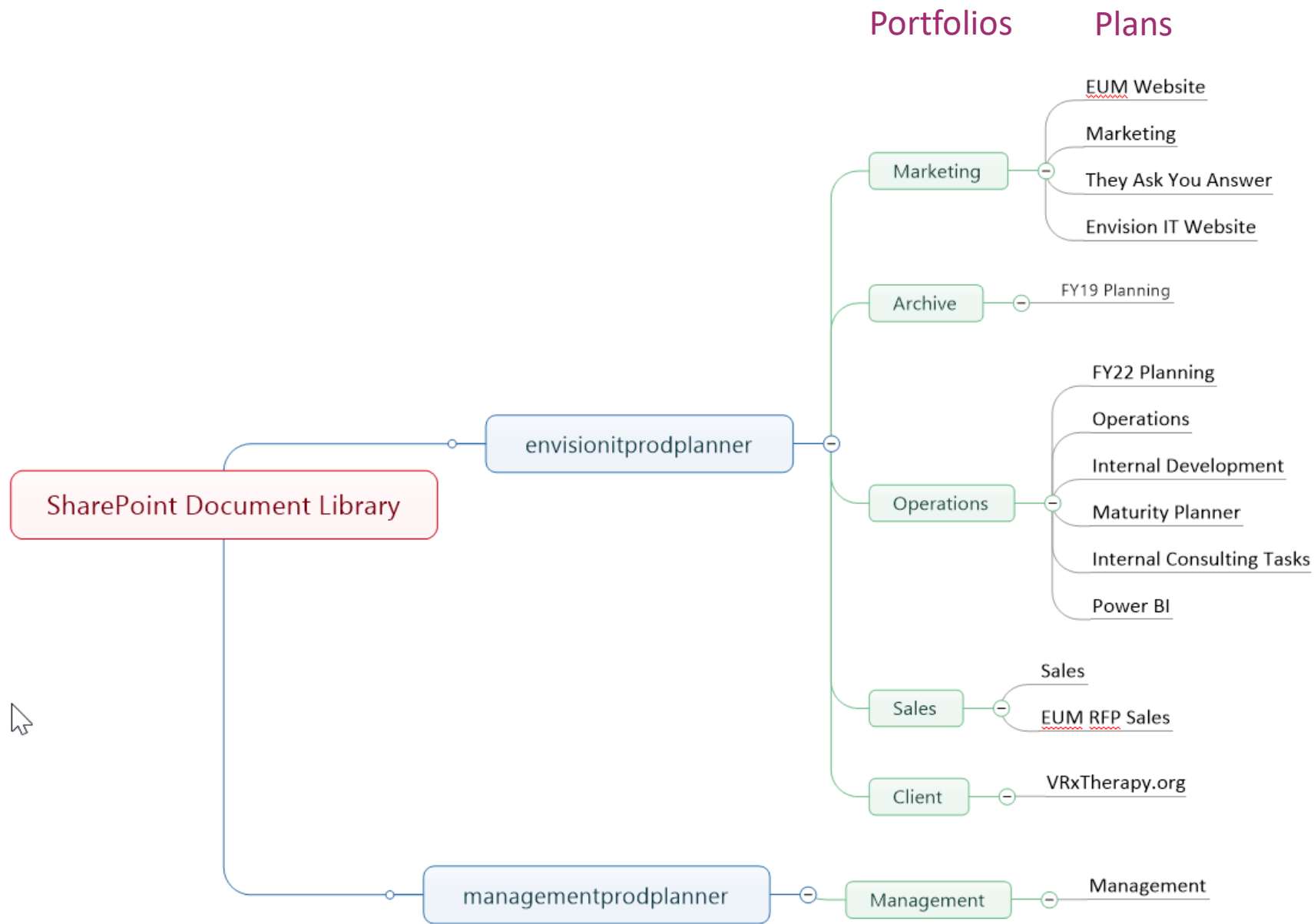


# Planner Rollup Architecture

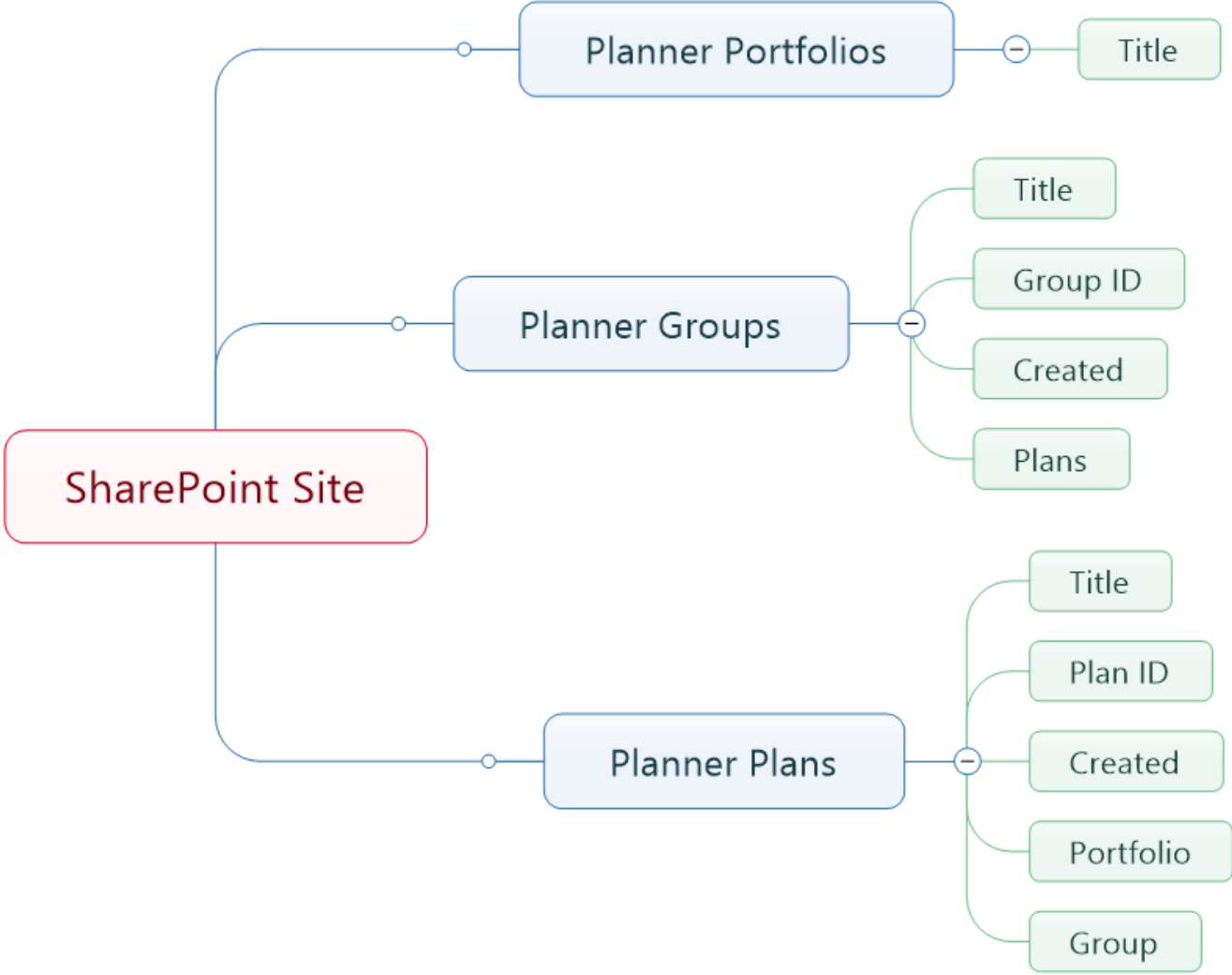


# Planner Rollup





# Planner Roll Up SharePoint Lists



# Planner Plans SharePoint List

- Power Automate populates plans in SharePoint list
  - Identifies connected Group for each Plan
- Limitation: doesn't detect connected Portfolio
  - Teams Provisioning solution can link Plan & Portfolio upon creation

Planner Plans					
Title ▾	Plan ID ▾	Created Date Ti... ▾	Portfolio ▾	Group ▾	ID ▾
FY19 Planning	-	2/21/2018 6:29 AM	Archive	FY19 Planning	9
FY22 Planning	-	11/11/2020 9:15 AM	Operations	Operations	10
Operations	-	9/3/2020 5:35 AM	Operations	Operations	11

# Planner Groups SharePoint List

- Populated by Power Automate
- Identifies the number of plans associated with a group

Planner Groups ☆ > 1, 2, 4			
Title ▾	Group ID ▾	Created Date Ti... ▾	Plans ▾ ▾
FY19 Planning	a3b00236-5056-4ae0-8b22-0f24d8a4d278	2/15/2018 1:36 PM	1
Operations	3744d57f-ea59-4aaf-8118-5615b4e14156	4/9/2018 9:39 AM	2
Development	314058b1-0156-4809-bab8-e356b7888af6	4/30/2018 9:43 AM	1
Sales	502cd6e9-6f76-4e03-b1fb-69fb54353341	5/3/2018 10:29 AM	2
Consulting	546ea045-bf13-4b6a-81d0-da699a68c90c	5/4/2018 10:49 AM	2
Management	5ff36e79-c0b2-4879-9ea7-446752ba32a7	5/4/2018 10:58 AM	1

# Planner Portfolios SharePoint List

- Managed manually
- Define the portfolios you would like to have and the storage account they should be stored in
  - Everything except management goes into **envisionitprodplanner** Storage Account

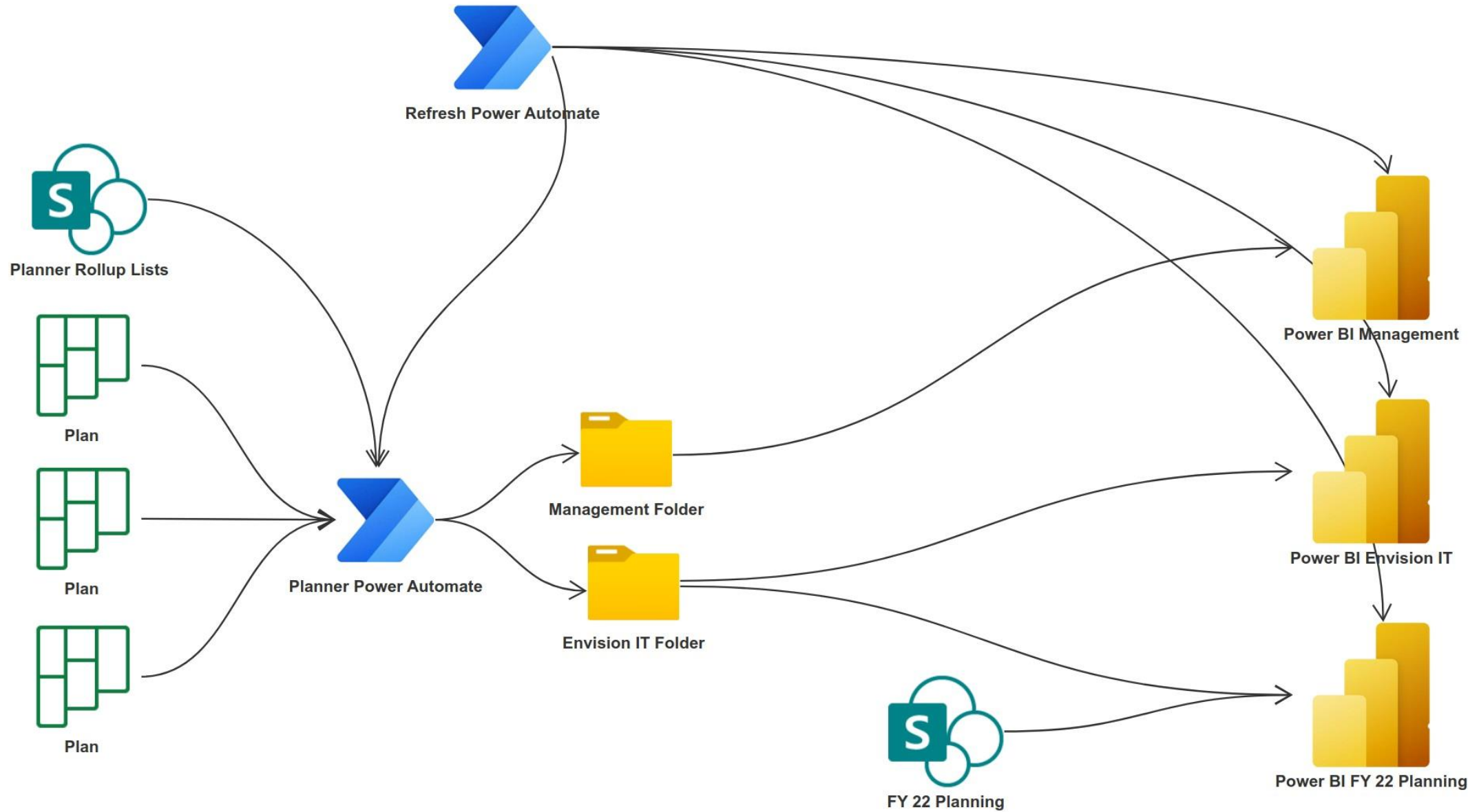
Planner Portfolios	
Title ▾	Storage Account ▾
Marketing	envisionitprodplanner
Archive	envisionitprodplanner
Operations	envisionitprodplanner
Sales	envisionitprodplanner
Management	managementprodplanner
Client	envisionitprodplanner



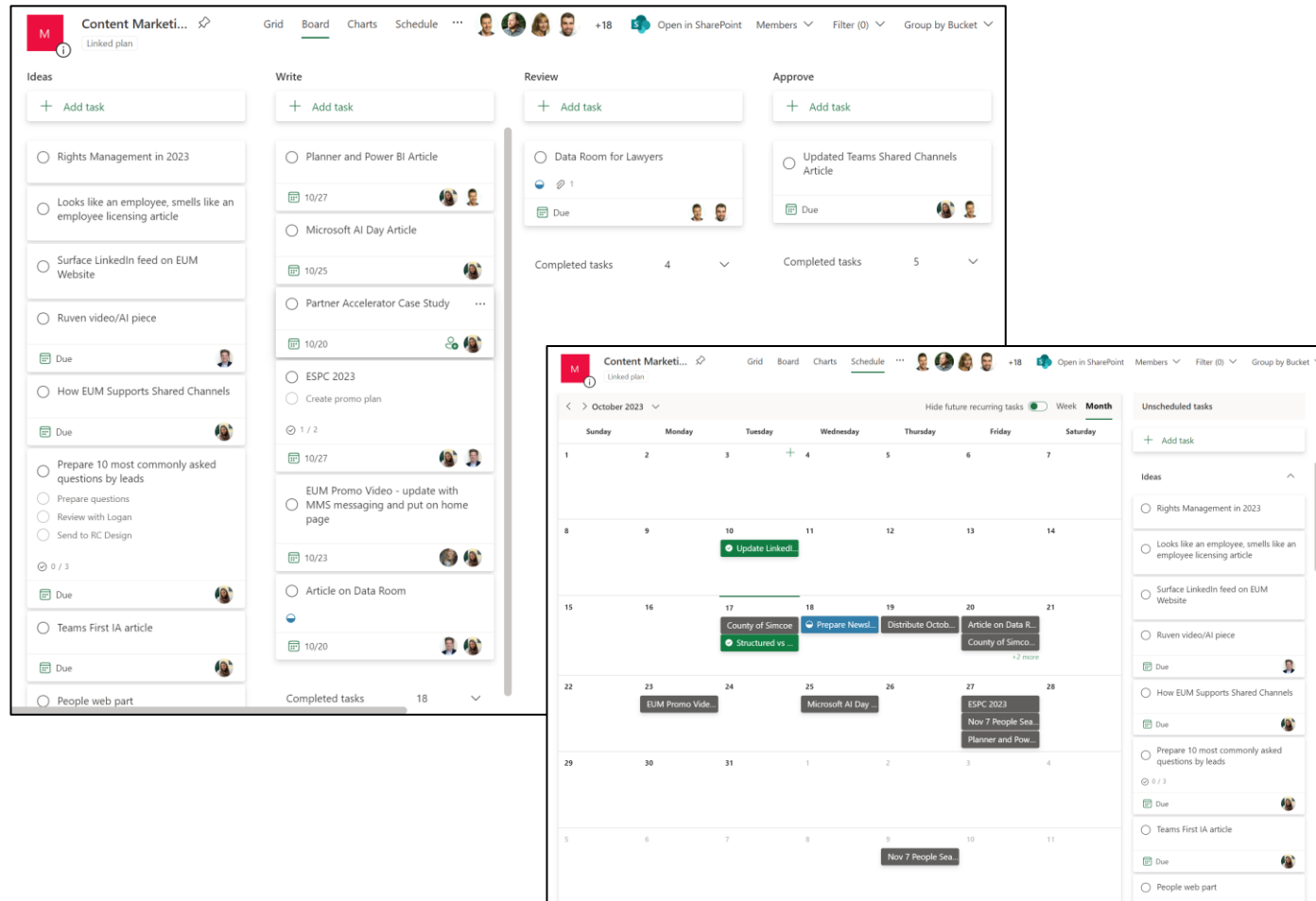
# Planner Data

- Document Library with folders for each portfolio
- CSVs that are generated into each folder
- Power BI reads this to populate the dashboard

# Roll Up Power BI Dashboard Demo

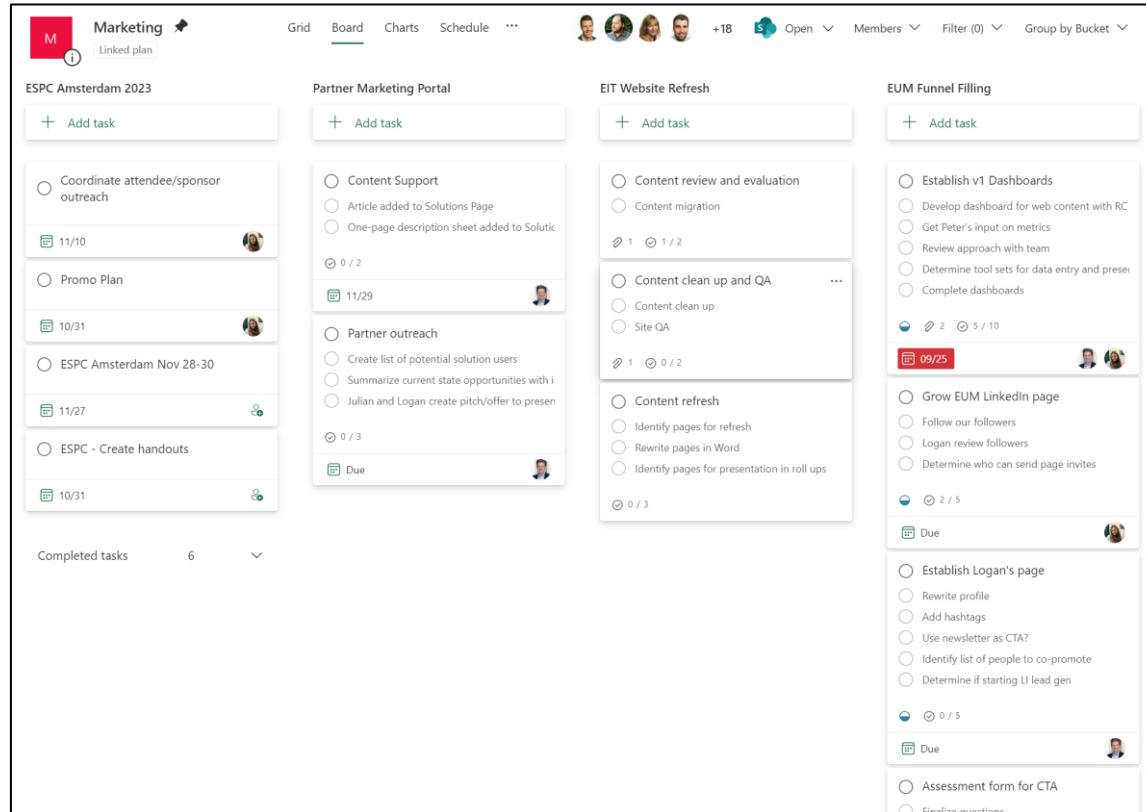


# Content Calendar Use Case



- Separate buckets based on content creation stage
  - **Ideas:** concepts for future content
  - **Write:** articles/assets with an assigned resource and defined due date
  - **Review:** drafts requiring initial review from teammates
  - **Approve:** completed assets requiring final approval from SMEs
- Schedule/calendar view provides clear and intuitive overview of deadlines and timelines
- Links to content in Word or CMS

# Marketing Initiatives Use Case



- Buckets for disparate marketing initiatives
  - Events
  - Website development
  - Lead generation
  - Partner marketing
  - Etc.
- Templated checklists for recurring tasks
  - Based on internal processes
- Easily track who is responsible for what and project status
- Links to project documents

# Case Study: County of Simcoe

- **The Client:** Municipality comprised of 16 towns and townships in Ontario
  - Responsible for a range of municipal services which include social housing, land ambulance and emergency planning, environmental services, and more.
- **Mission Statement:** *“Providing affordable, sustainable services and infrastructure through leadership and innovative excellence.”*
- IT Department consists of approximately 40 employees
- Wide range of IT services, including regular system maintenance, projects, GIS mapping.



## Case Study: County of Simcoe

# Planner & Power BI for IT Operations and Project Management

### Unified Task Management

- Integration of Planner and Power BI for real-time task visibility and visualization

### Project Management Efficiency

- Three standardized Planner buckets: Schedule/Milestones, Planning, To-Do
- **Schedule/Milestones**
  - Each card represents a project, with assigned PM, resource, and due date
- **Planning**
  - Project resources track project components with set target dates; reviewed in daily standup
- **To-Do**
  - Flexible and adaptive; intended for unexpected tasks requiring next-day review with team

### Real-Time Task Dashboards for Team Meetings

- Daily review of previous day's tasks with status updates
- Weekly review of tasks due in the upcoming week, visualized in Power BI



## Case Study: County of Simcoe

# Planner Use Cases & Benefits



### GIS Library Data Maintenance

- Planner with a singular bucket for tracking recurring tasks
- Each task represented by a card, with automatic assignment to responsible staff and target date updates
- Allows easy tracking task status in team meetings



### Transparency and Daily Standups

- Integration of Planner and Power BI facilitates efficient daily team standups, ensuring everyone is aligned on their responsibilities and project status
- Senior management maintains access to all projects for visibility

# Summary Points



## Microsoft Planner

- Planner is a great tool for managing group tasks



## Power BI

- Delivers powerful data visualizations
- Enhances single Plan data presentation in diverse ways



## Power Automate

- Seamlessly consolidates Planner content into distinct portfolios for tailored access and visibility



## Security & Privacy

- Ensures task visibility restrictions

# Let's stay connected



## Upcoming Webinar:

Building a Rich People Search with  
OOTB and Open-Source Components

November 7<sup>th</sup>, 2023

8am PST / 11am EST



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