










**Project Management Workflow
Methodology with Microsoft New Planner**

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ecostar plan

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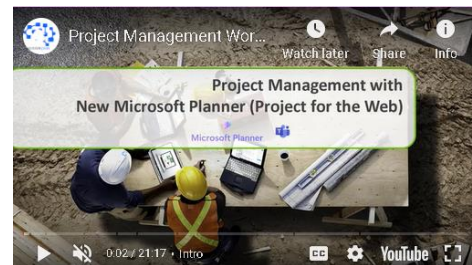
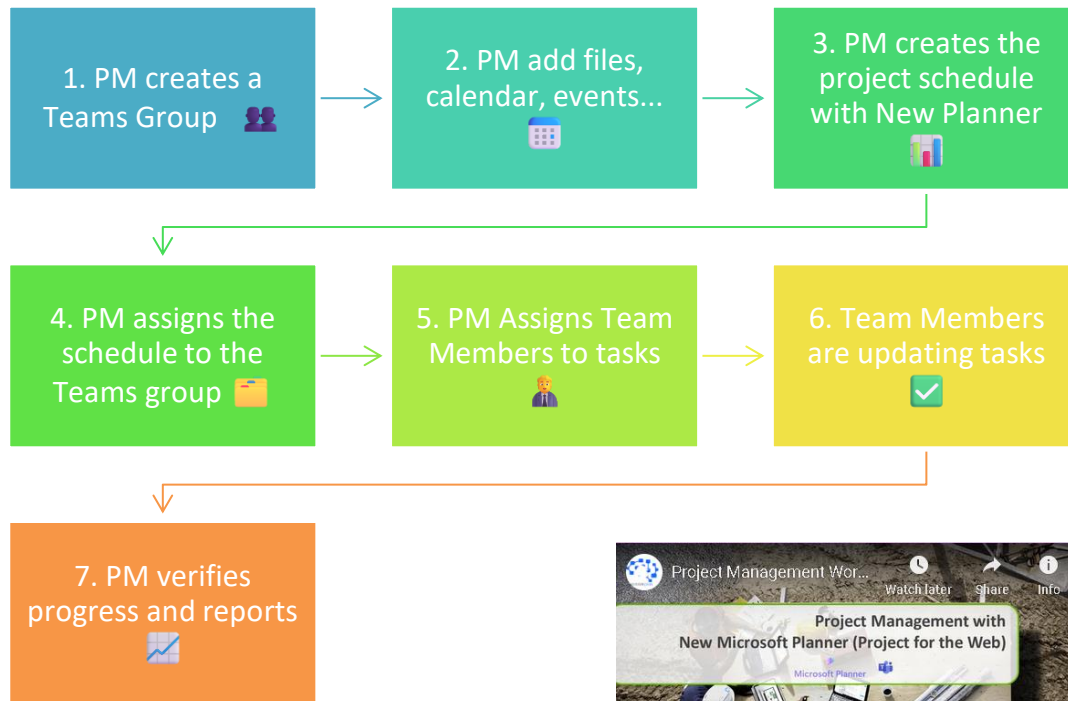
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Methodology overview

This workbook provides a concise guide to the most common project management workflow using Microsoft Planner (Project for the Web). The steps outlined below follow a typical project lifecycle, emphasizing the roles and actions of the Project Manager (PM) and team members within Microsoft Teams and Planner.

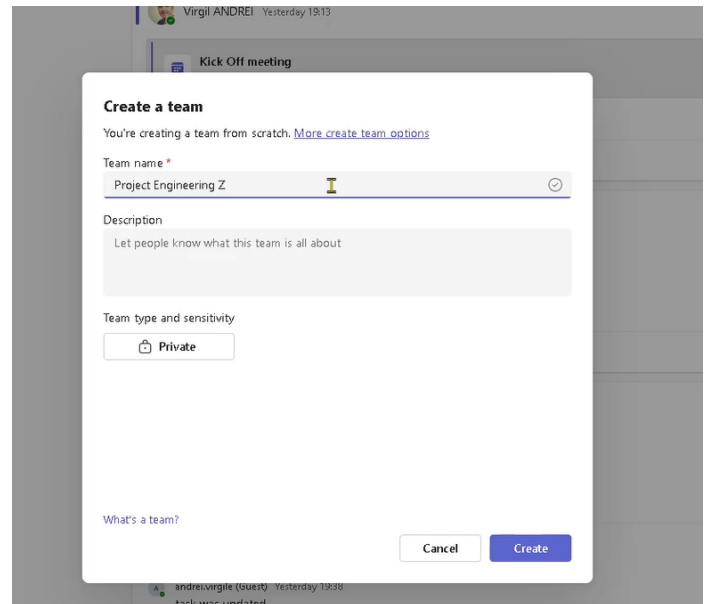


1. PM creates a Teams Group

Objective: Establish a collaborative space for the project team.

Steps:

1. Open Microsoft Teams.
2. Click on "Teams" in the sidebar.
3. Select "Join or create a team."
4. Choose "Create team" and select "From scratch."
5. Name the team (e.g., "Project Alpha Team") and add a description.
6. Set the privacy settings (Public or Private).
7. Click "Create" to finalize the team setup.

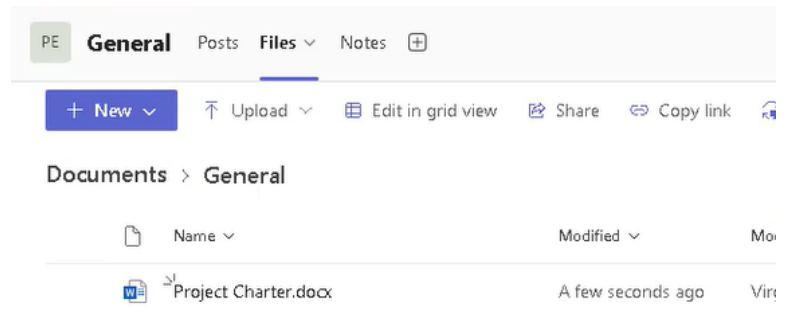


2. PM add files, calendar, events...

□ **Objective:** Organize project documentation and schedule important dates.

□ **Steps:**

1. Within the new Teams group, navigate to the "Files" tab.
2. Upload essential project documents.
3. Go to the "Calendar" tab.
4. Schedule project kickoff meetings, milestone reviews, and other key events.
5. Invite relevant team members to these events.

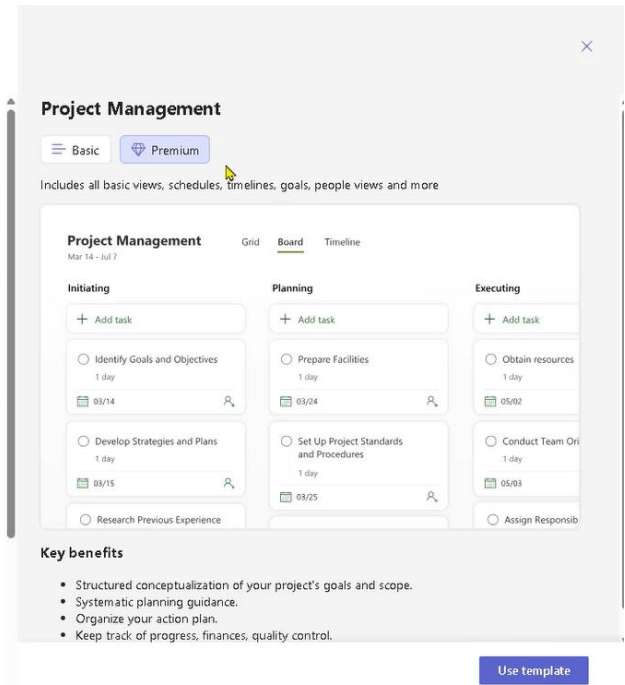
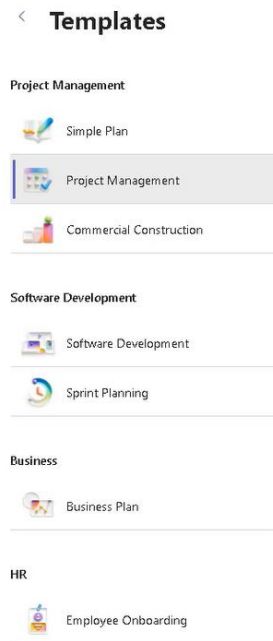


3. PM creates the project schedule with New Planner

□ **Objective:** Develop a detailed project schedule outlining tasks and deadlines.

□ **Steps:**

1. Open Microsoft Planner.
2. Create a new plan and name it (e.g., "Project Alpha Schedule").
3. Use existing templates if available, or create a custom plan.
4. Add tasks, set due dates, and categorize them by phases or workstreams.

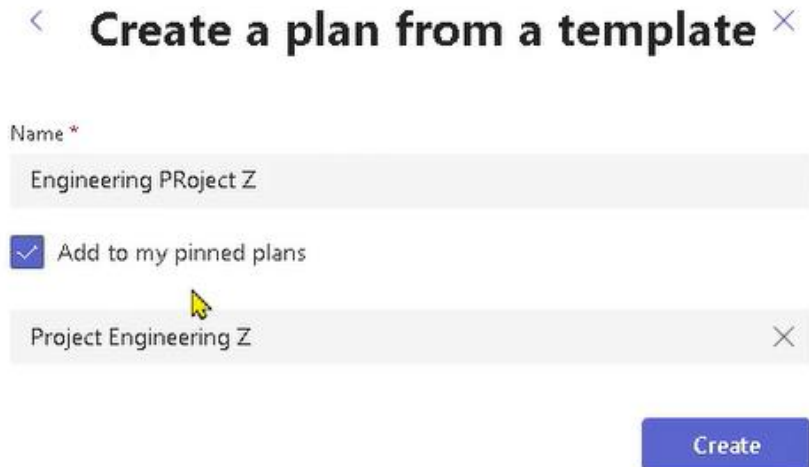


4. PM assigns the schedule to the Teams group

□ **Objective:** Link the project plan to the Teams group for seamless collaboration.

□ **Steps:**

1. In Microsoft Teams, navigate to the appropriate team.
2. Click on the "+" icon to add a new tab.
3. Select "Planner" from the options.
4. Choose the existing plan created in the previous step.
5. Add it as a tab for easy access.



< **Create a plan from a template** ×

Name *

Engineering PProject Z

Add to my pinned plans

Project Engineering Z ×

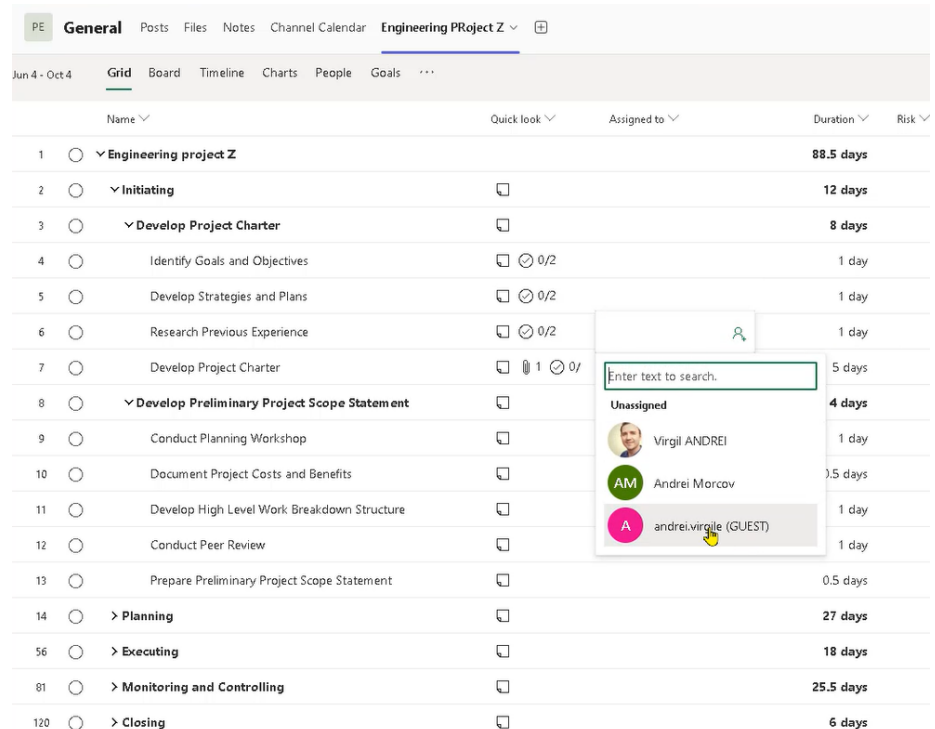
Create

5. PM Assigns Team Members to tasks

□ **Objective:** Delegate responsibilities and ensure clarity on who is doing what.

□ **Steps:**

1. In the Planner tab within Teams, open the project plan.
2. Click on a task to open its details.
3. Assign the task to the appropriate team member(s).
4. Add any necessary details or attachments to the task.



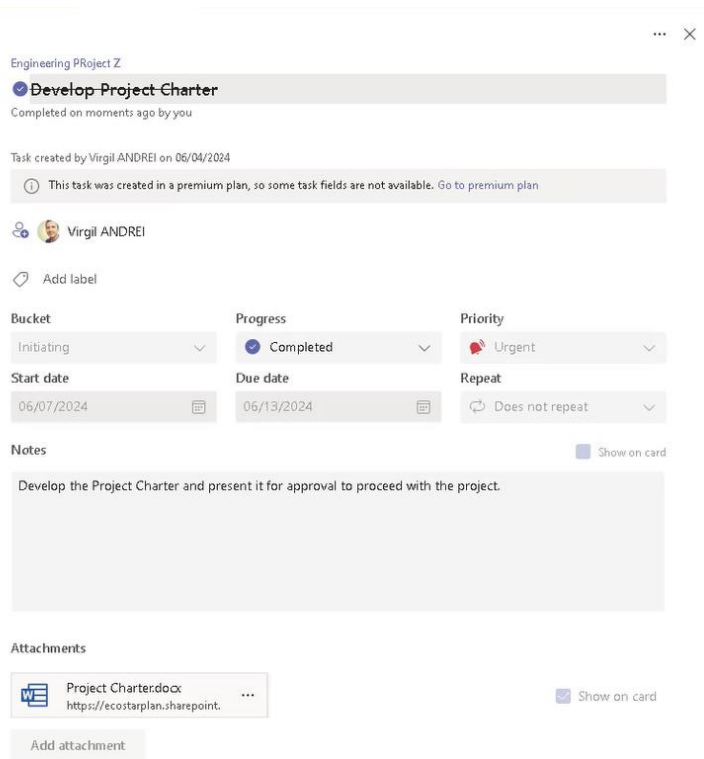
Name	Quick look	Assigned to	Duration	Risk
1 <input type="radio"/> Engineering project Z			88.5 days	
2 <input type="radio"/> Initiating	<input type="checkbox"/>		12 days	
3 <input type="radio"/> Develop Project Charter	<input type="checkbox"/>		8 days	
4 <input type="radio"/> Identify Goals and Objectives	<input type="checkbox"/> <input checked="" type="checkbox"/> 0/2		1 day	
5 <input type="radio"/> Develop Strategies and Plans	<input type="checkbox"/> <input checked="" type="checkbox"/> 0/2		1 day	
6 <input type="radio"/> Research Previous Experience	<input type="checkbox"/> <input checked="" type="checkbox"/> 0/2		1 day	
7 <input type="radio"/> Develop Project Charter	<input type="checkbox"/> <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 0/2		5 days	
8 <input type="radio"/> Develop Preliminary Project Scope Statement	<input type="checkbox"/>		4 days	
9 <input type="radio"/> Conduct Planning Workshop	<input type="checkbox"/>		1 day	
10 <input type="radio"/> Document Project Costs and Benefits	<input type="checkbox"/>		0.5 days	
11 <input type="radio"/> Develop High Level Work Breakdown Structure	<input type="checkbox"/>		1 day	
12 <input type="radio"/> Conduct Peer Review	<input type="checkbox"/>		1 day	
13 <input type="radio"/> Prepare Preliminary Project Scope Statement	<input type="checkbox"/>		0.5 days	
14 <input type="radio"/> Planning	<input type="checkbox"/>		27 days	
56 <input type="radio"/> Executing	<input type="checkbox"/>		18 days	
81 <input type="radio"/> Monitoring and Controlling	<input type="checkbox"/>		25.5 days	
120 <input type="radio"/> Closing	<input type="checkbox"/>		6 days	

The assignment dropdown menu is open for task 7, showing the following options:

- Unassigned
- Virgil ANDREI
- AM Andrei Marcov
- andrei.virgile (GUEST)

6. Team Members are updating tasks

- **Objective:** Ensure team members are aware of their responsibilities and keep track of progress.
- **Steps:**
 1. Team members receive notifications about new assignments.
 2. In Microsoft Teams, navigate to the Planner tab or use the Planner app.
 3. Review assigned tasks and their details.
 4. Update task status (e.g., "In Progress," "Completed") and add comments or documents as needed.
 5. Use the "Files" tab in Teams for document collaboration.



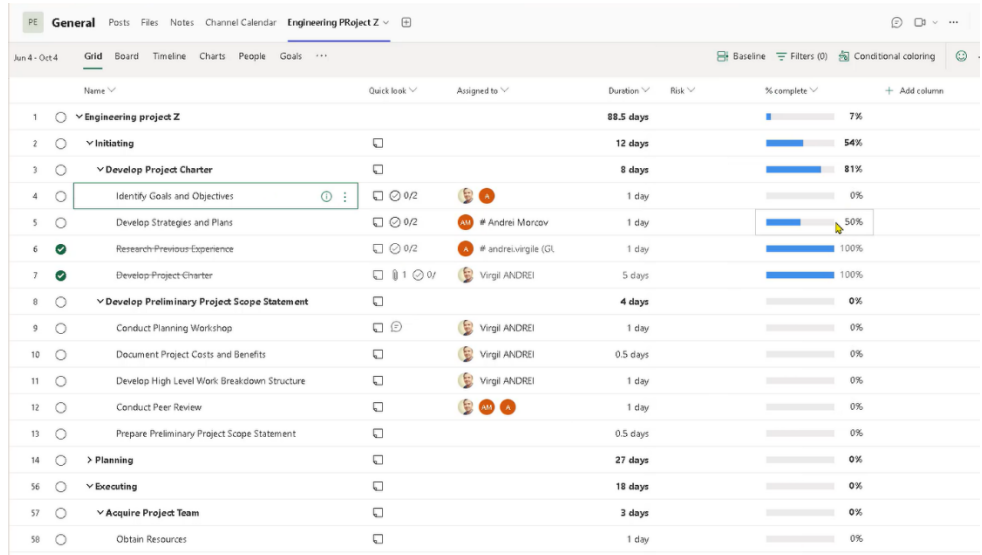
The screenshot shows a task card in Microsoft Planner. At the top, it says 'Engineering Project Z' and 'Develop Project Charter' with a blue checkmark icon. Below that, it says 'Completed on moments ago by you'. A message indicates the task was created by Virgil ANDREI on 06/04/2024. There is a warning icon and text: 'This task was created in a premium plan, so some task fields are not available. Go to premium plan'. The creator's name 'Virgil ANDREI' is shown with a profile picture. There is an 'Add label' button. The task has three columns: 'Bucket' (Initiating), 'Progress' (Completed with a blue checkmark), and 'Priority' (Urgent with a red exclamation mark). Below these are 'Start date' (06/07/2024) and 'Due date' (06/13/2024), both with calendar icons. The 'Repeat' section is set to 'Does not repeat'. There is a 'Notes' section with a 'Show on card' checkbox and the text: 'Develop the Project Charter and present it for approval to proceed with the project.' The 'Attachments' section shows a document titled 'Project Charter.docx' with the URL 'https://ecostarplan.sharepoint.' and a 'Show on card' checkbox. There is also an 'Add attachment' button.

7. PM verifies progress and reports

□ **Objective:** Monitor project progress and report updates to stakeholders.

□ **Steps:**

1. Regularly review the project plan in Planner.
2. Check task statuses and completion rates.
3. Use Planner's built-in charts and graphs to visualize progress.
4. Export data or use Power BI for more detailed reporting.
5. Share progress reports with stakeholders through Teams or email.

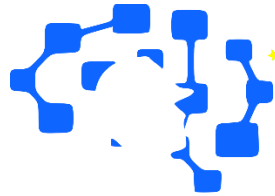


Name	Quick look	Assigned to	Duration	Risk	% complete
1 ○ Engineering project Z			88.5 days		7%
2 ○ ▼ Initiating			12 days		54%
3 ○ ▼ Develop Project Charter			8 days		81%
4 ○ Identify Goals and Objectives	📄 0/2	👤 0	1 day		0%
5 ○ Develop Strategies and Plans	📄 0/2	👤 # Andrei Morcov	1 day		50%
6 ✓ Research-Previous-Experience	📄 0/2	👤 # andreivirgile (GL)	1 day		100%
7 ✓ Develop-Project-Charter	📄 1 0/1	👤 Virgil ANDREI	5 days		100%
8 ○ ▼ Develop Preliminary Project Scope Statement			4 days		0%
9 ○ Conduct Planning Workshop	📄	👤 Virgil ANDREI	1 day		0%
10 ○ Document Project Costs and Benefits	📄	👤 Virgil ANDREI	0.5 days		0%
11 ○ Develop High Level Work Breakdown Structure	📄	👤 Virgil ANDREI	1 day		0%
12 ○ Conduct Peer Review	📄	👤 0/1	1 day		0%
13 ○ Prepare Preliminary Project Scope Statement	📄		0.5 days		0%
14 ○ > Planning			27 days		0%
15 ○ ▼ Executing			18 days		0%
16 ○ ▼ Acquire Project Team			3 days		0%
17 ○ Obtain Resources	📄		1 day		0%

8. Conclusions

This workbook outlines the essential steps for managing a project using Microsoft Teams and Planner. By following this workflow, Project Managers and team members can effectively collaborate, track progress, and ensure the successful completion of projects.

*Improve the
technical and interpersonal
skills of project teams*



ecostarplan®

www.ecostarplan.com

office@ecostarplan.com

