Project2Planner User Guide

Synchronising Microsoft Project tasks with Microsoft Planner

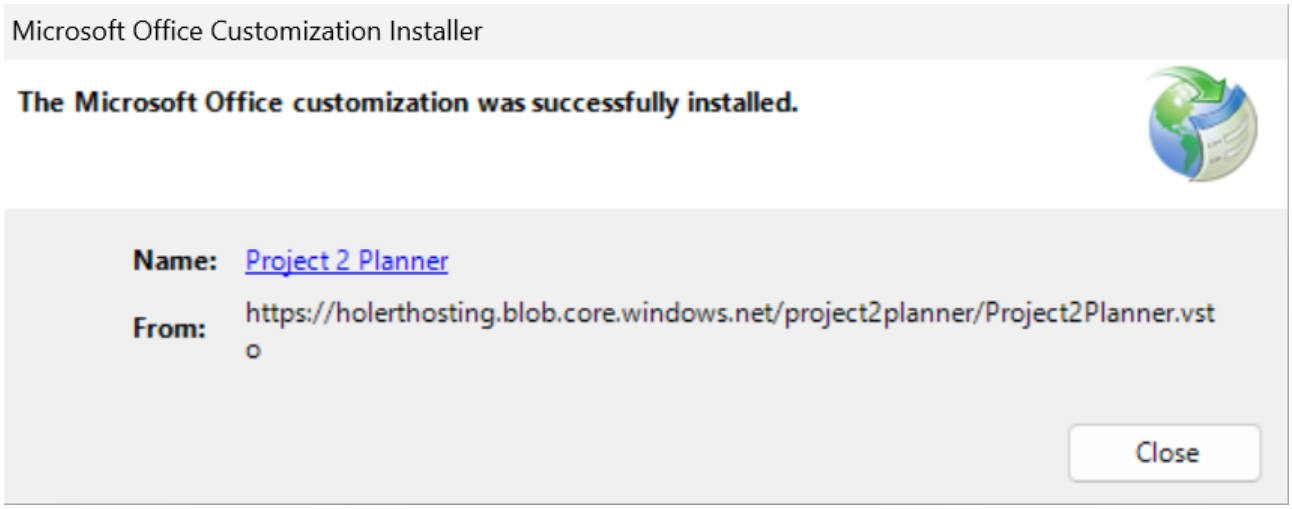
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1. Overview

Project2Planner synchronises tasks between Microsoft Project and Microsoft Planner. Tasks you select in a project are created in a Planner plan, and the progress your team reports in Planner comes back into the project.

Download: https://holerthosting.blob.core.windows.net/project2planner/setup.exe



1.1 Which mode do you need?

The add-in works in one of two modes, and they differ in more than size: the single plan mode takes the tasks you select and puts them into one plan, while the multiple plans mode reads the outline of the project and builds plans, buckets and tasks from it. Pick the mode first — it decides which fields the project needs and what the ribbon offers.

	Single Planner plan	Multiple Planner plans
Planner plans per project	One.	As many as you link.
What becomes a Planner task	Every Project task you select.	The tasks on the third outline level.
Where the bucket comes from	A field, for the whole project or per task.	The second outline level.
Checklist items	Not used but can be configured to a fixed list of checklist items.	The subtasks below a Planner task.
Fields in the project	Planner URL, Planner bucket name, Planner task link.	Planner Info, Planner Checklist Backup.
Buttons in the ribbon	Create/Update Planner task, Refresh from Planner.	Create Planner task, Refresh from Planner, Delete Planner task.
Fits	A project that is worked on in one team plan.	A project whose parts are planned in separate plans.

The mode is switched as SyncMode setting in the configuration file. Set it before the fields are configured, because each mode needs different ones. Single Planner plan and Multiple Planner plans each describe one mode from end to end; General applies to both.

2. Single Planner plan

The add-in needs three fields in the project: the link to the Planner plan, the bucket name and the field it writes the link to the Planner task back into. Microsoft Project on its own is enough for this; the fields are then local custom fields of the project file. Where the projects live on a Project Server, the same three fields are created once as enterprise custom fields, so that every project has them.

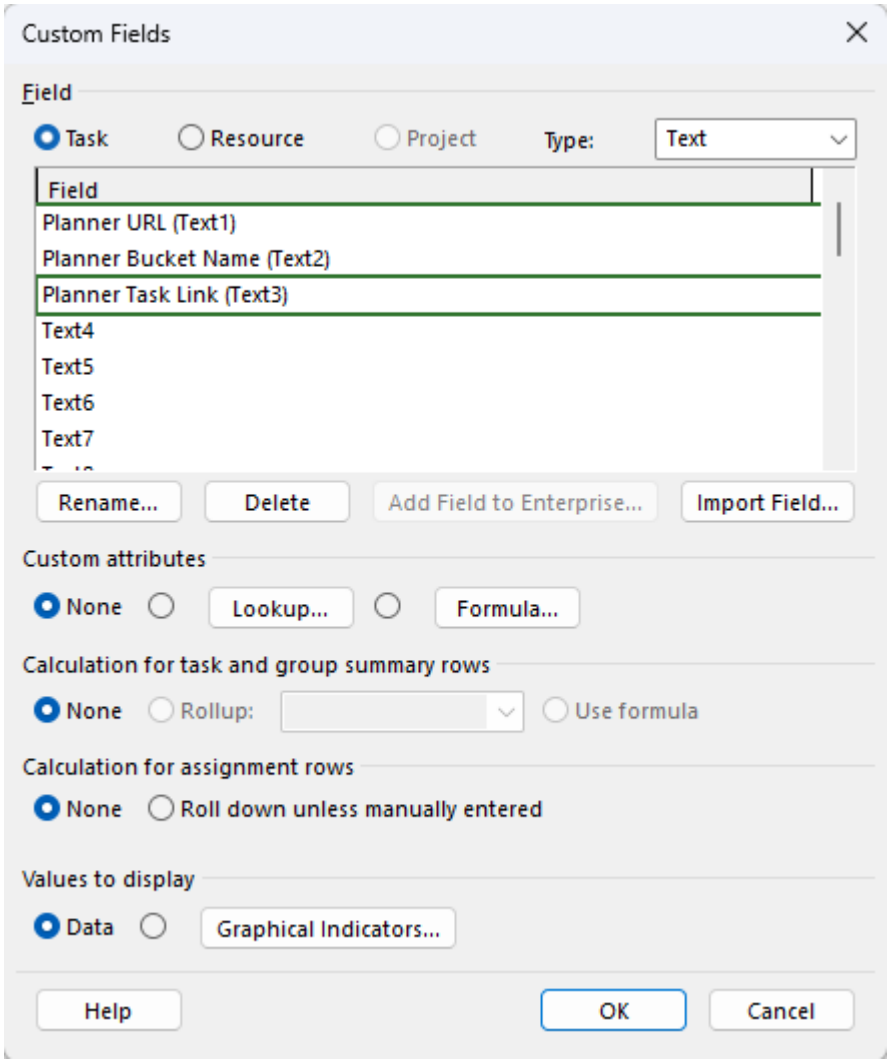
2.1 Configure the fields in Microsoft Project

The quickest way is to let the add-in set them up. Open the Project2Planner tab in the ribbon, select Settings, go to Sync Settings and click Set up fields in this project. For each configured field that does not exist in the project yet, the add-in gives a free local text field (Text1 to Text30) the configured name, and it adds the Planner task link column to the current view. Text fields that already have a name or hold values are left alone. Save the project afterwards: the fields belong to the project file, so this is done once per project.

If you click Create/Update Planner task in a project that lacks the fields, the add-in offers the same setup before it continues.

To configure them by hand instead, open your .mpp file and click Custom Fields on the Project tab. Configure text fields as task fields for:

- Planner URL
- Planner bucket name
- Planner task link



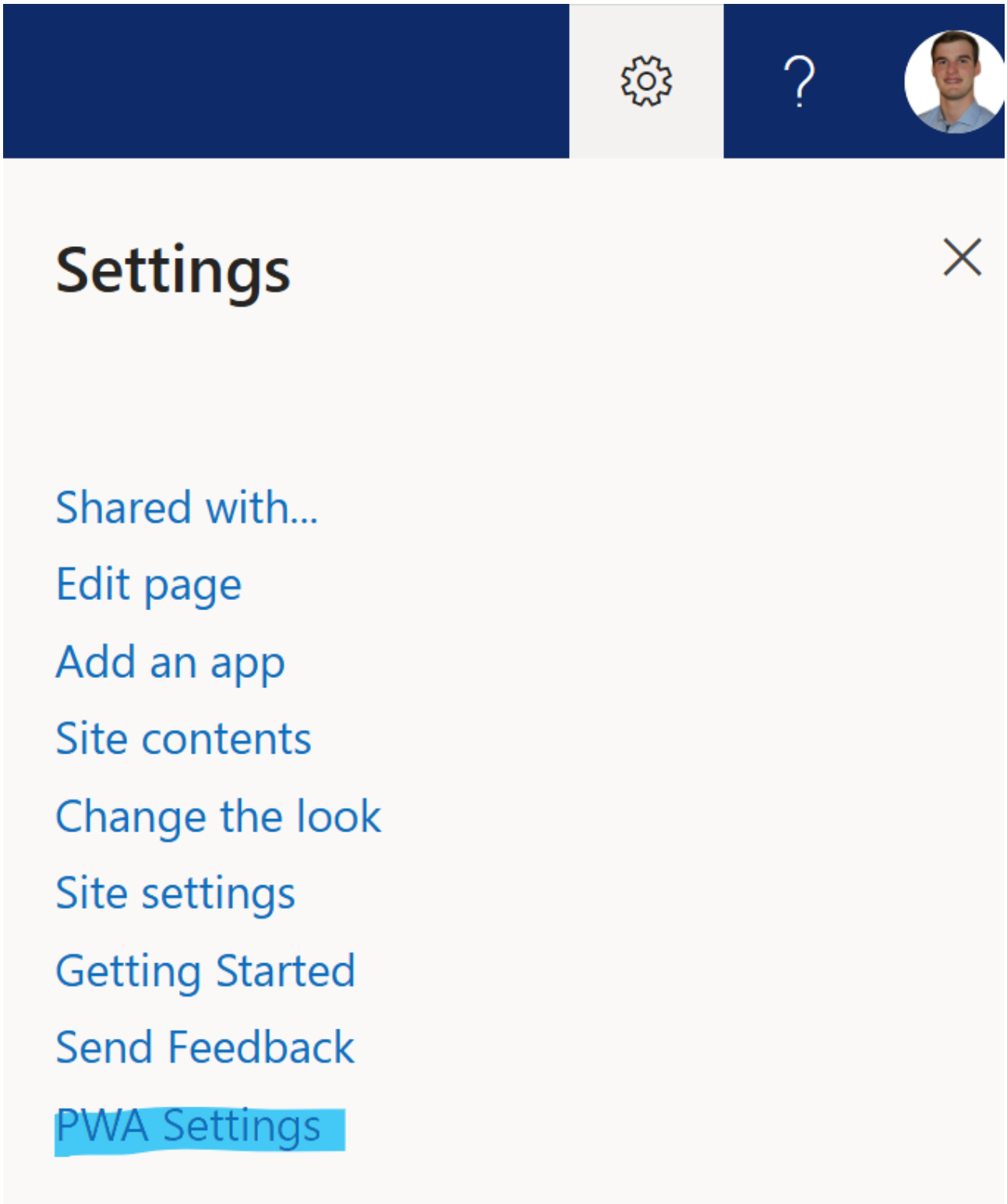
Then make the Project2Planner settings match the fields you created, as described under Check the field names in the add-in.

2.2 With Project Server: prepare the PWA

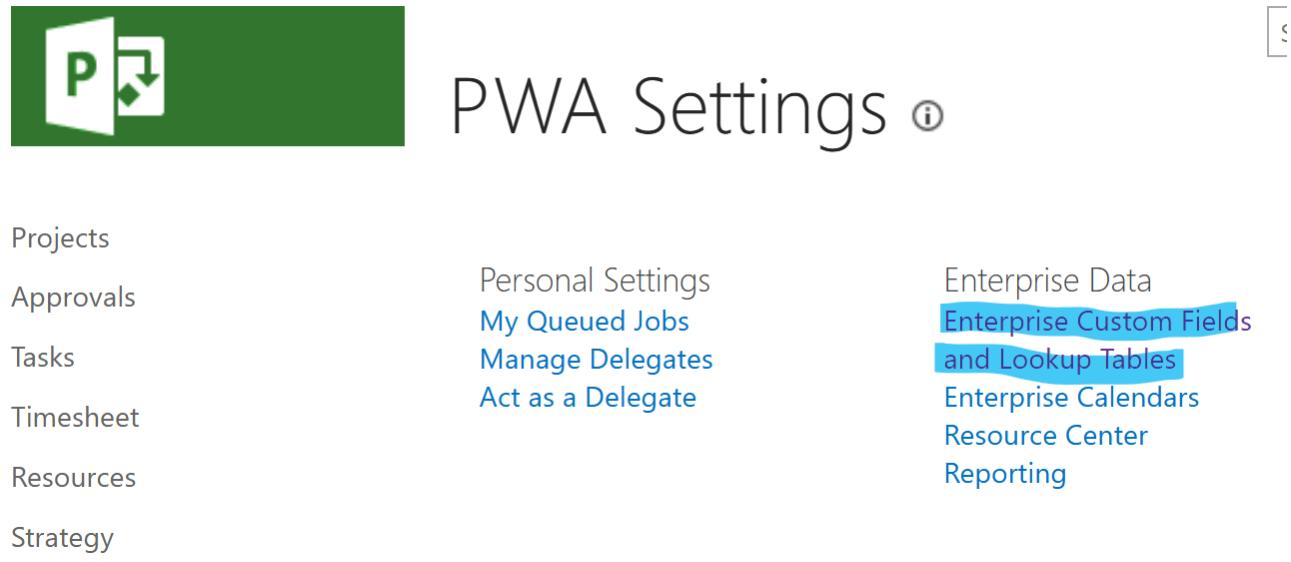
Only needed where the projects are published to a Project Server. Project Online was retired on 30 September 2026, so this is Project Server Subscription Edition; Microsoft Project on its own does not have a PWA, and the fields are configured as described above instead.

Open the PWA site, for example https://companyname.sharepoint.com/sites/PWAname.

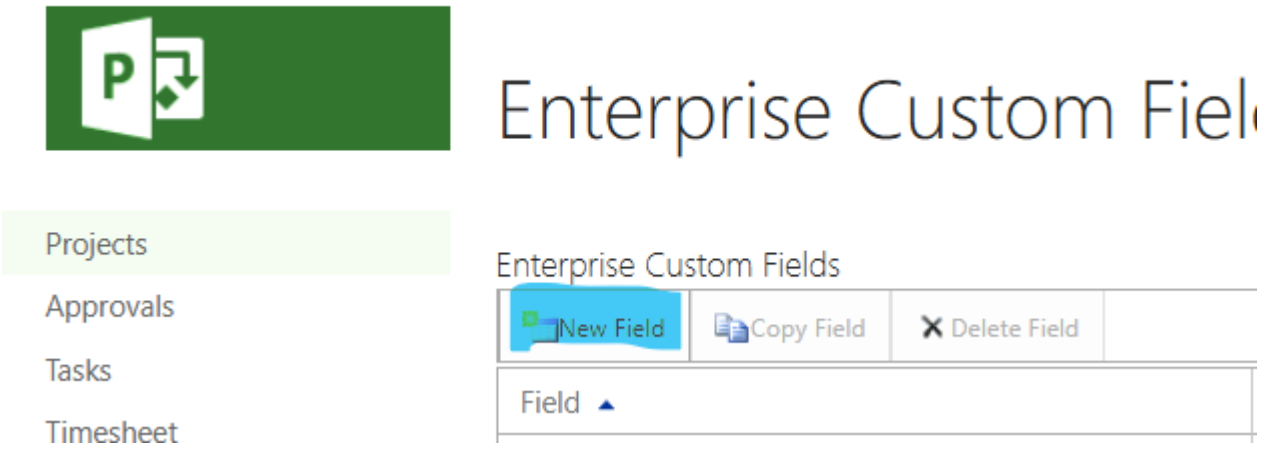
In the top right corner, open Settings and then PWA Settings.



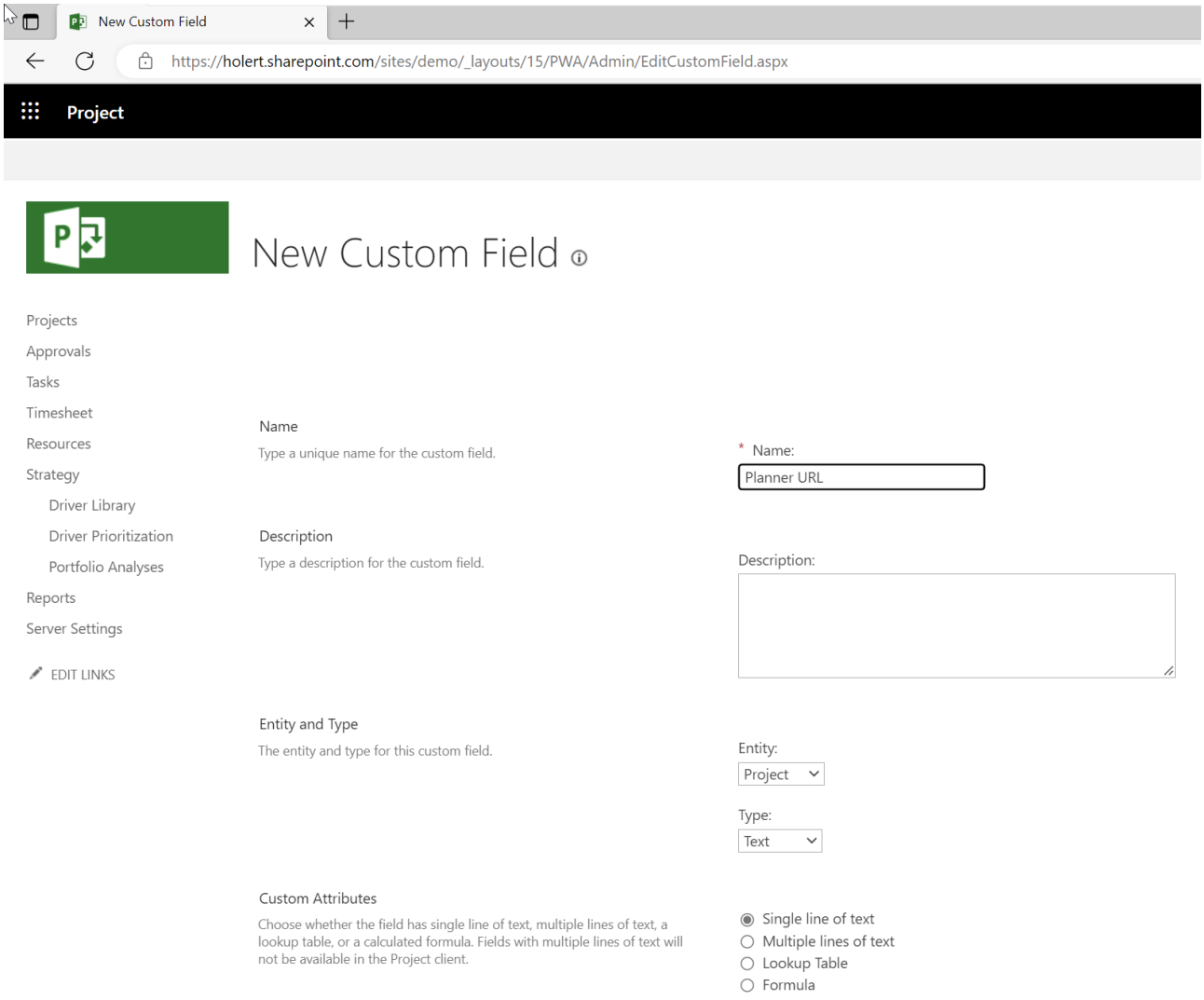
Under Enterprise Data, open the settings for Enterprise Custom Fields and Lookup Tables.



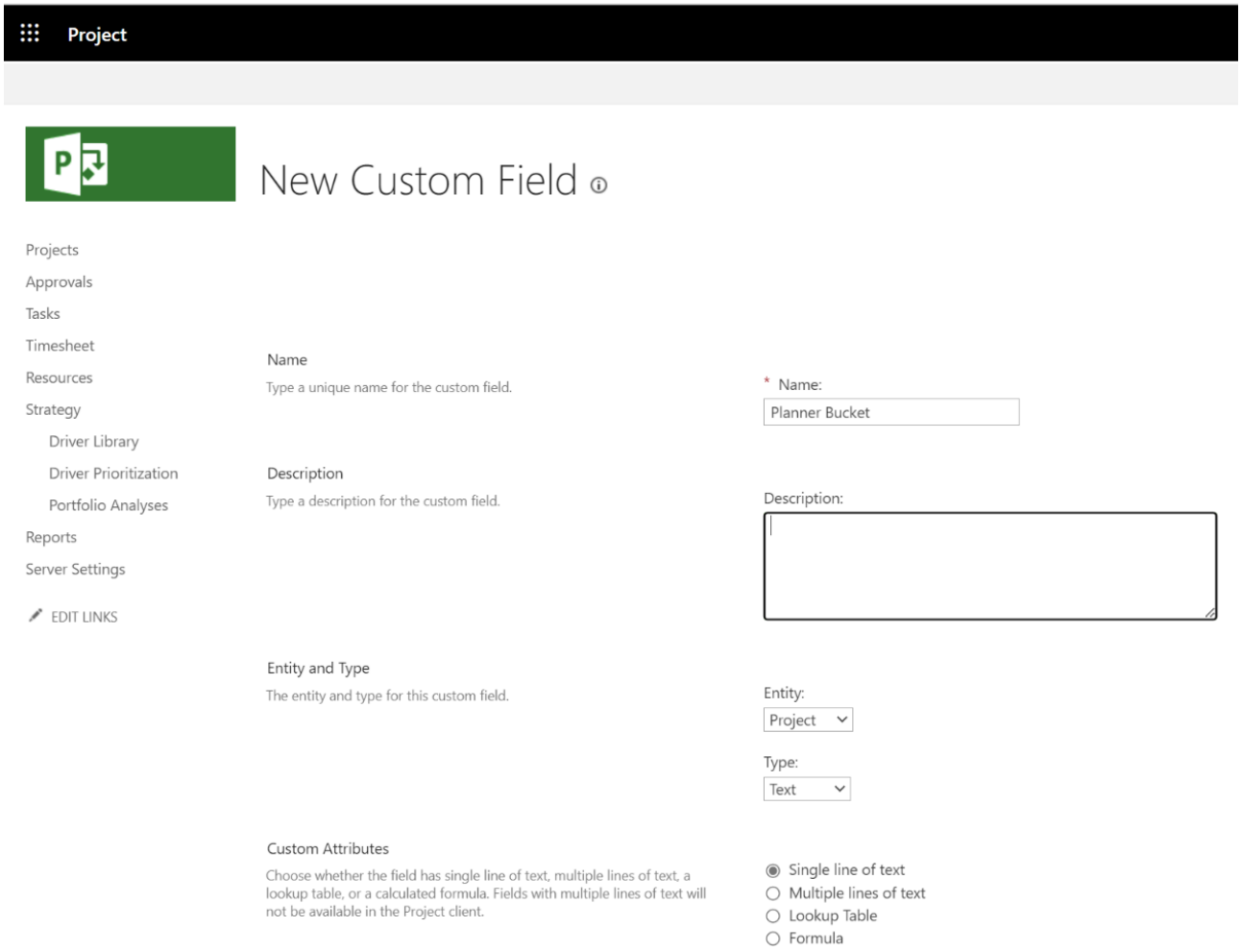
Create a new field.



Create the new project enterprise custom field Planner URL.



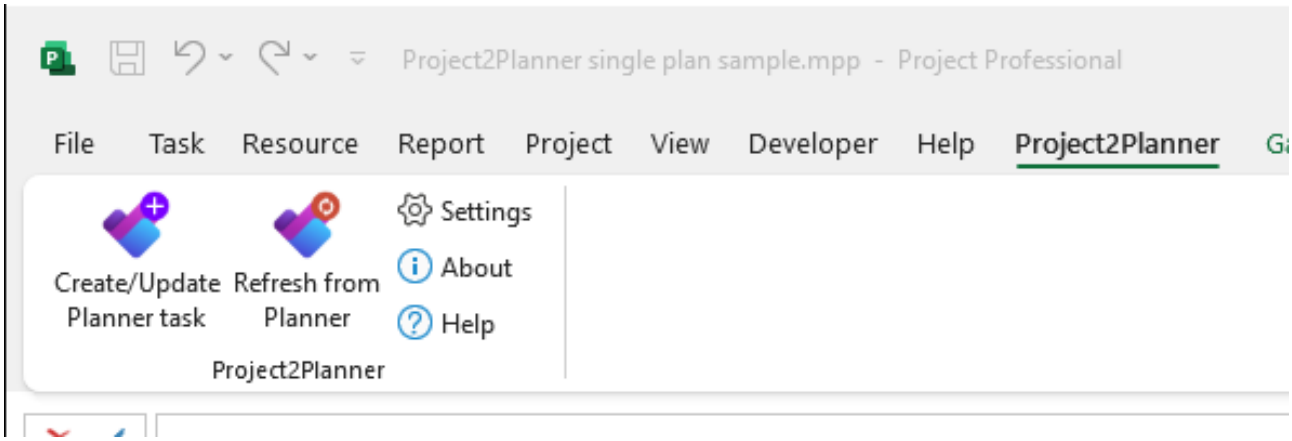
Create the project enterprise custom field Planner Bucket as well.



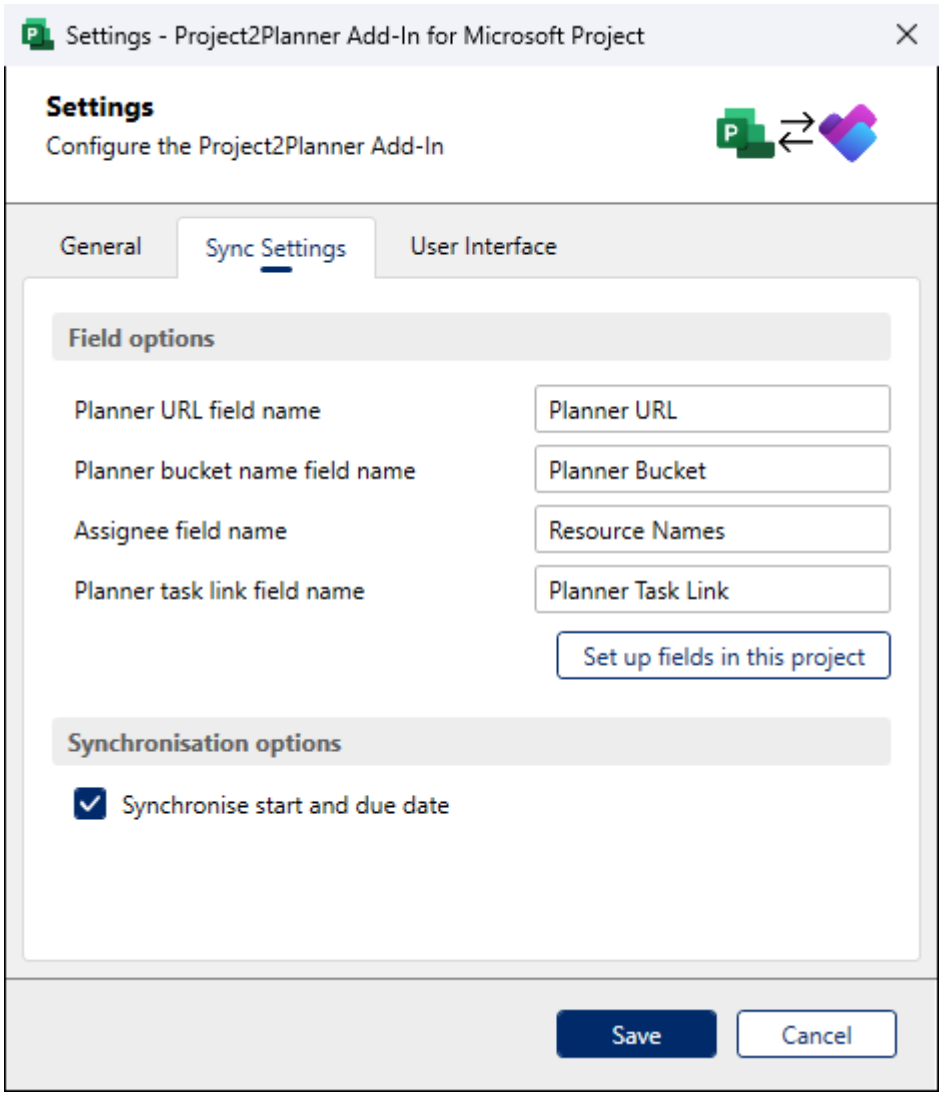
Restart your Microsoft Project desktop app.

2.3 Check the field names in the add-in

The add-in sits in the ribbon of Microsoft Project.



If the field names you created differ from the ones Project2Planner expects, the synchronisation does not work correctly. Correct the names on the Sync Settings tab: open the Project2Planner tab in the ribbon, select Settings and go to Sync Settings.



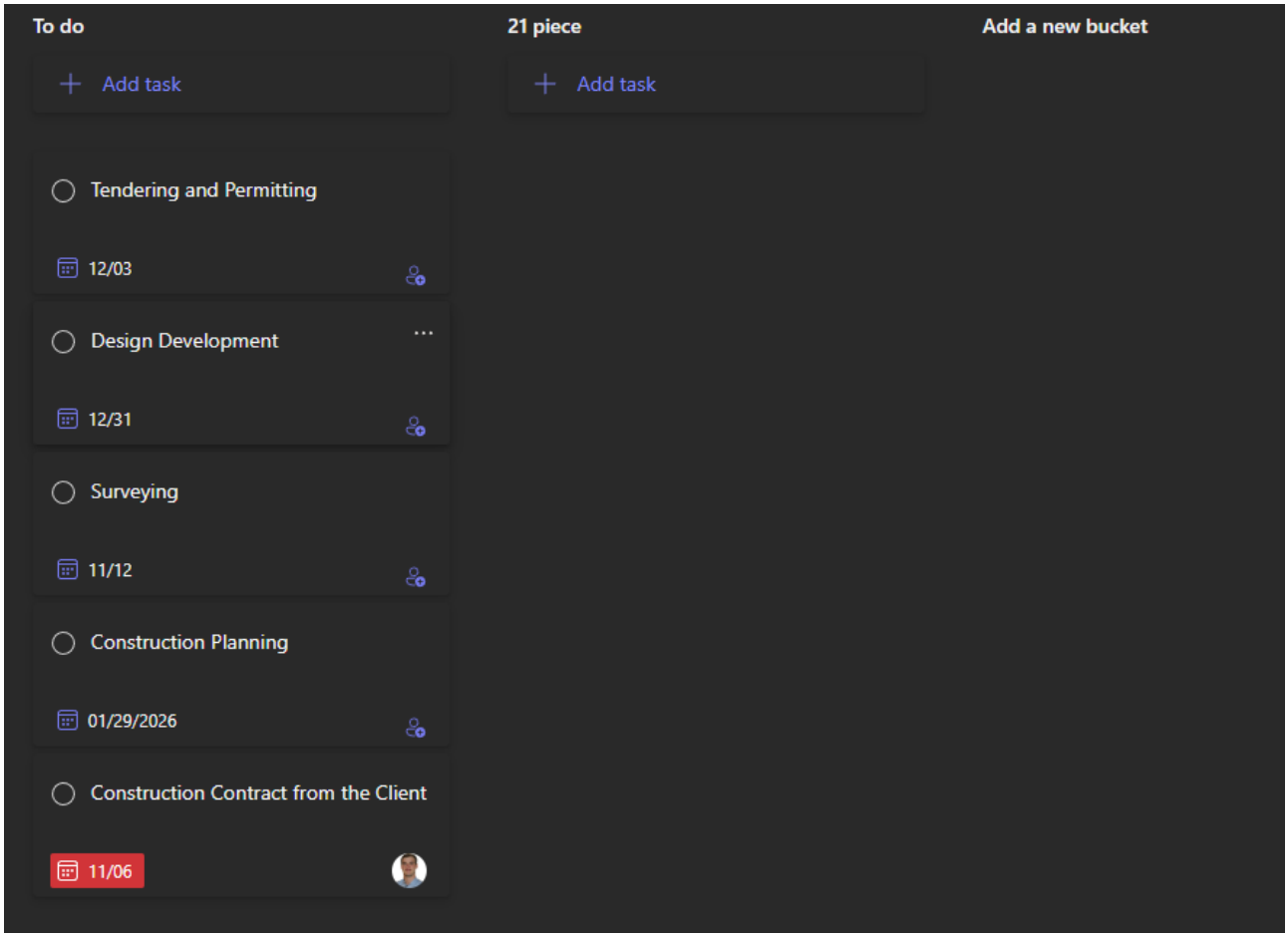
Update the field names to match the fields in your project file or on the Project Server.

2.4 Project level and task level

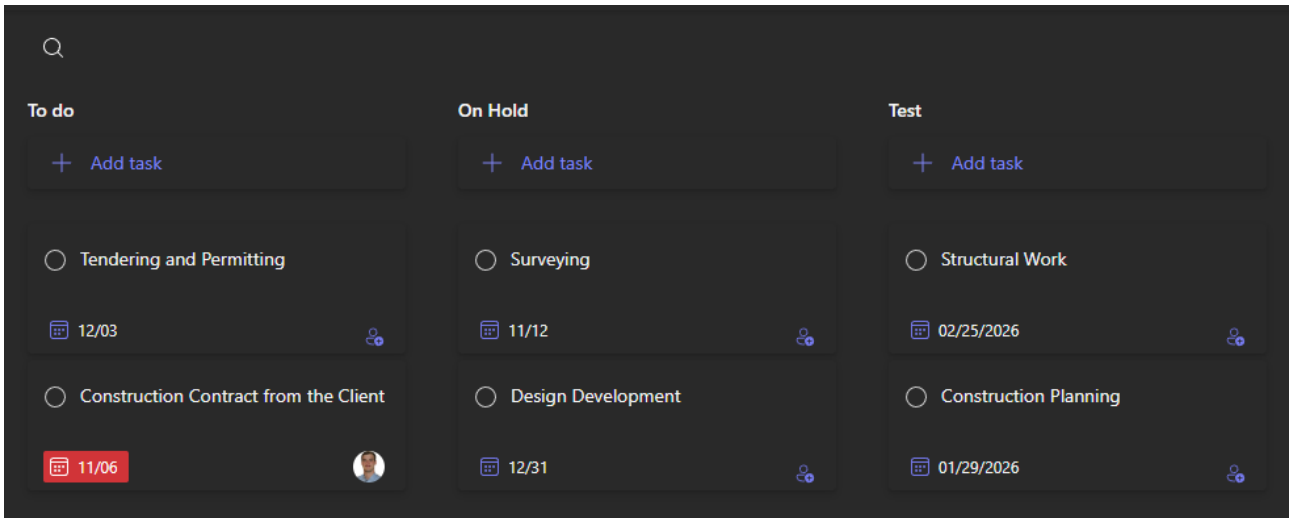
A field can be synchronised on project level or on task level.

- On project level all tasks use the same value, the one defined in the project.
- On task level each task can have its own value.
- If a value exists in the project but not in Planner, it is created automatically.
- When both levels are used, the field names have to be different.

With the Planner bucket synchronised on project level, all tasks are placed in the same bucket.

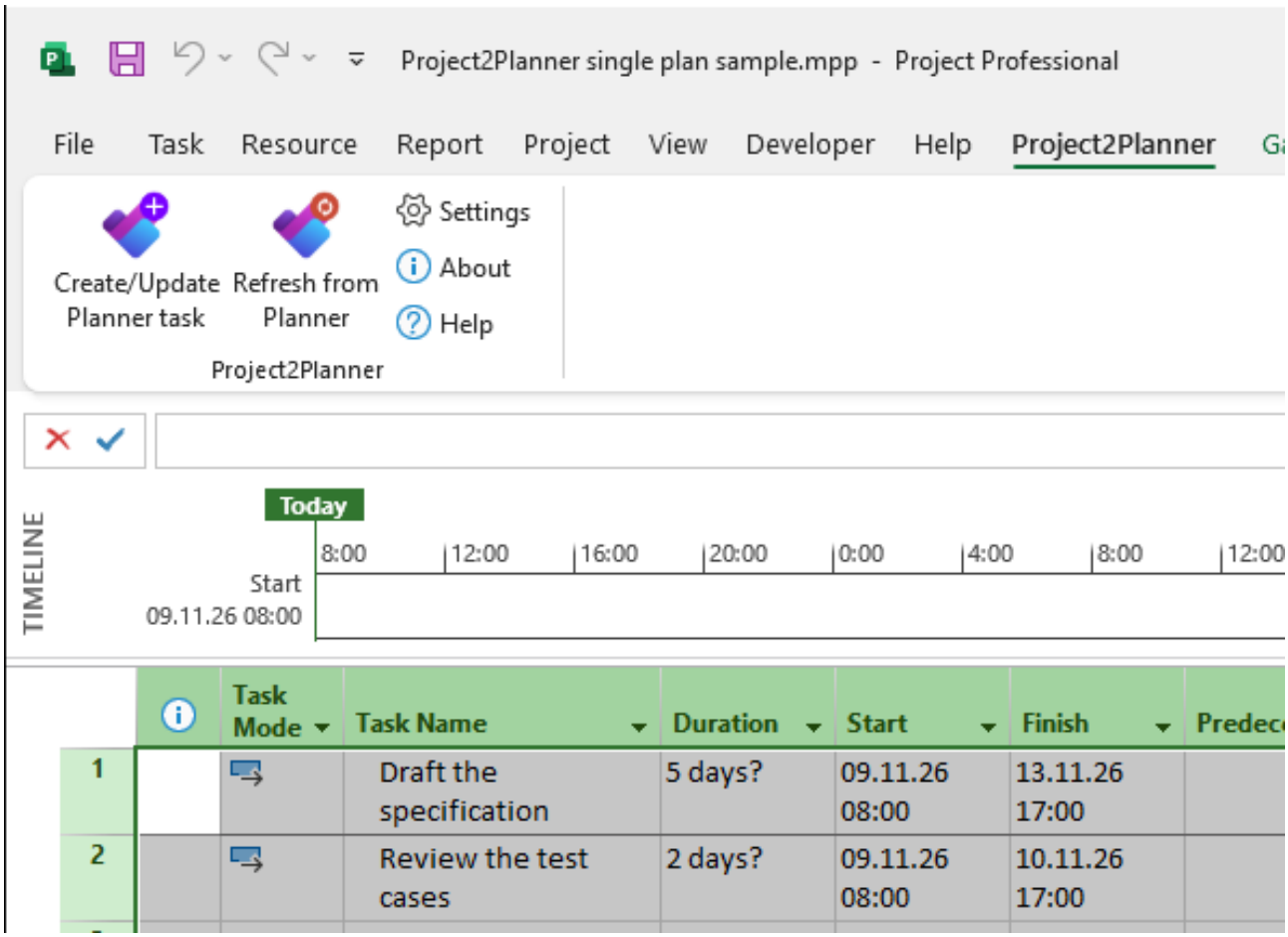


With the Planner bucket synchronised on task level, each task can have its own bucket, and the bucket field of the task is synchronised individually.

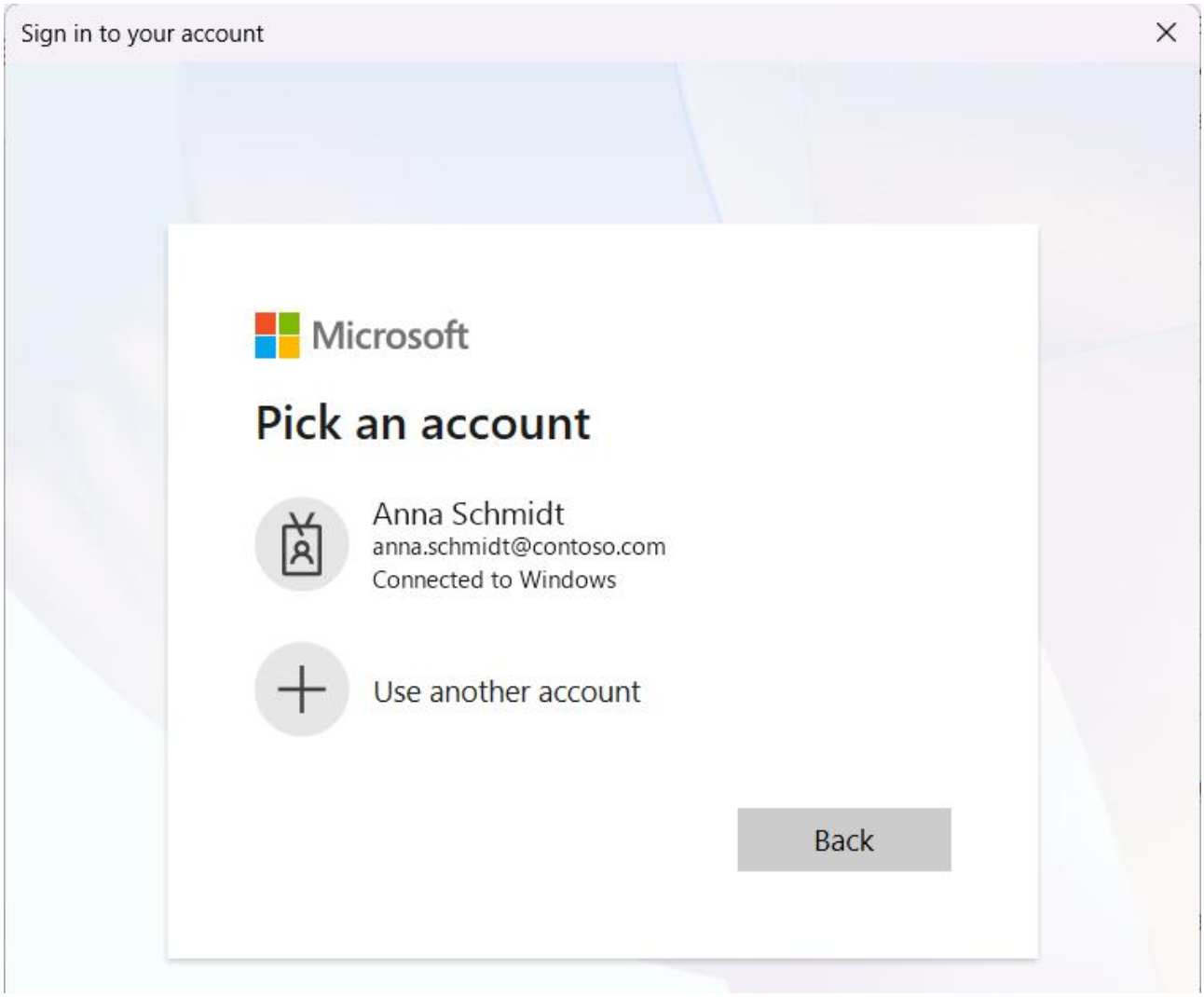


2.5 Create Planner tasks

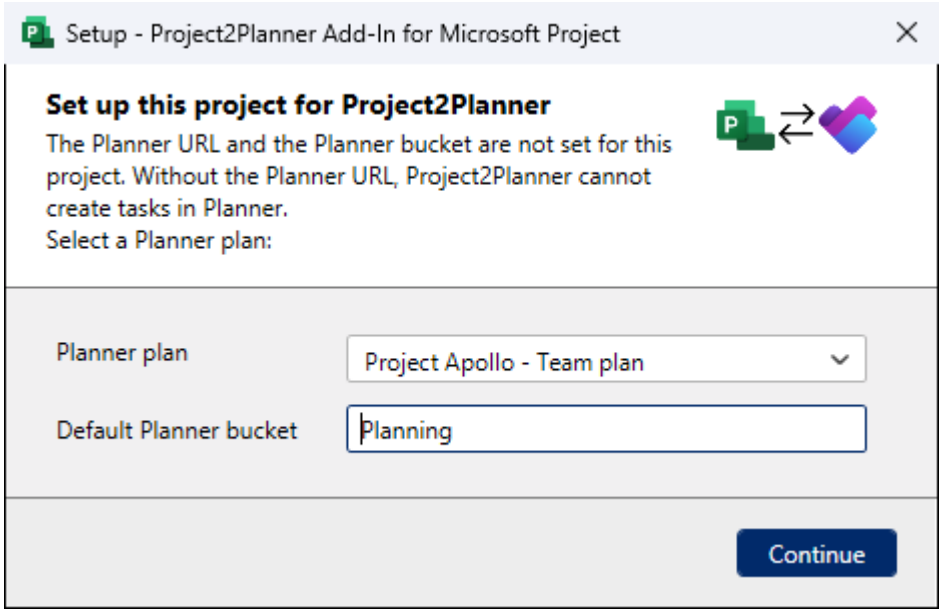
Open a project, select the tasks you want in Planner and click Create/Update Planner task.



Connect with your account.



Select a target Planner plan, enter a bucket name and click Continue.



The Planner tasks are created. If the field synchronisation is configured, the links to the Planner tasks are written back into the project.

Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names	Planner Link
	Construction Contract from the Client	0 days	Thu 11/6/25	Thu 11/6/25			https://planner.cloud.microsoft/
	Construction Planning	61 days	Thu 11/6/25	Thu 1/29/26			https://planner.cloud.microsoft/
	Surveying	1 day	Wed 11/12/25	Wed 11/12/25			https://planner.cloud.microsoft/
	Design Development	8 wks	Thu 11/6/25	Wed 12/31/25			https://planner.cloud.microsoft/
	Tendering and Permitting	4 wks	Thu 11/6/25	Wed 12/3/25			https://planner.cloud.microsoft/

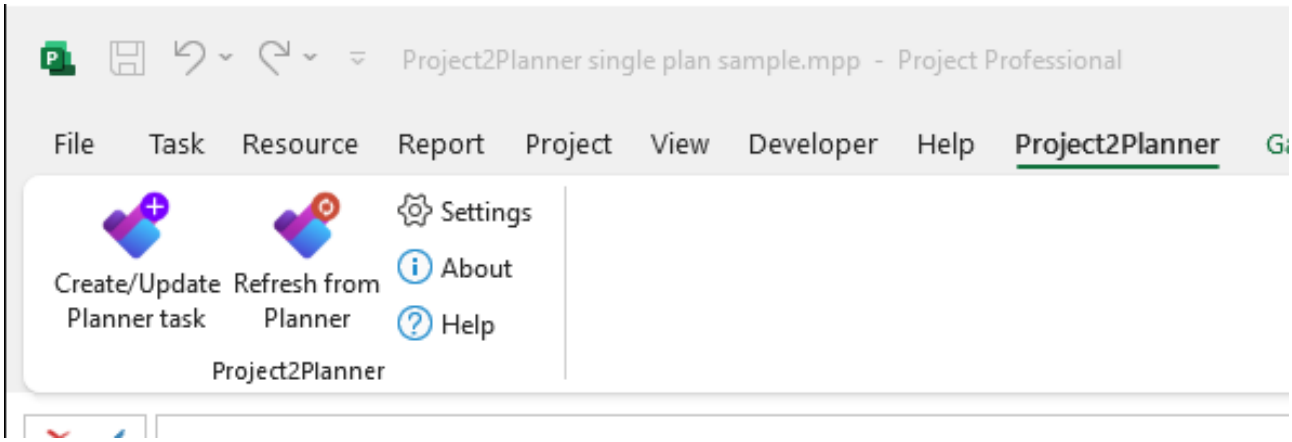
Microsoft Project is the leading system for the progress: Create/Update Planner task writes the % Complete of the selected Project tasks to Planner.

Progress that somebody reported in Planner in the meantime is not overwritten unnoticed. Before it writes, the add-in names the tasks whose progress in Planner differs from Project and asks whether you want to accept the progress from Planner first. Choose Yes to open the Changes from Planner dialog, or No to overwrite Planner with the values from Project. The warning can be switched off on the User Interface tab of the settings.

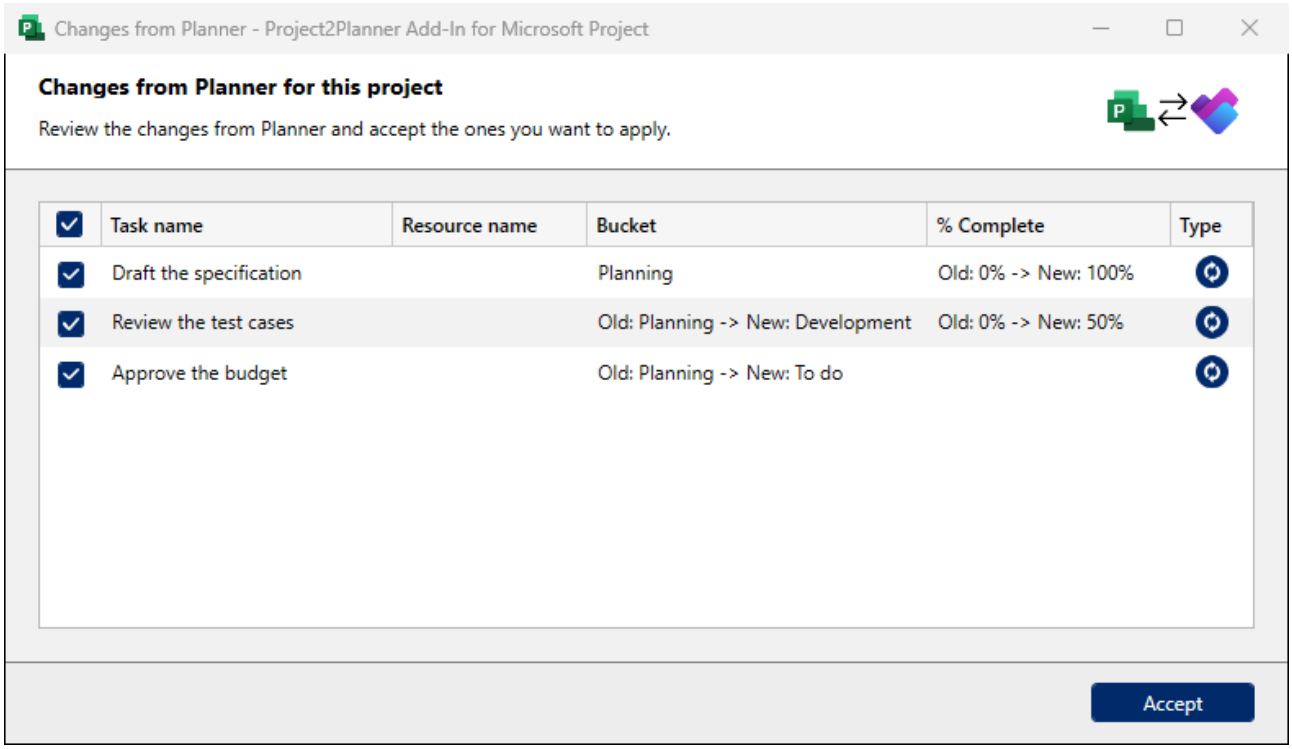
2.6 Update Project tasks from Planner

Changes in Planner can be brought back into Microsoft Project, for example the bucket or the progress.

Click the button Refresh from Planner.



Check the preview of the changes in the Changes from Planner dialog.



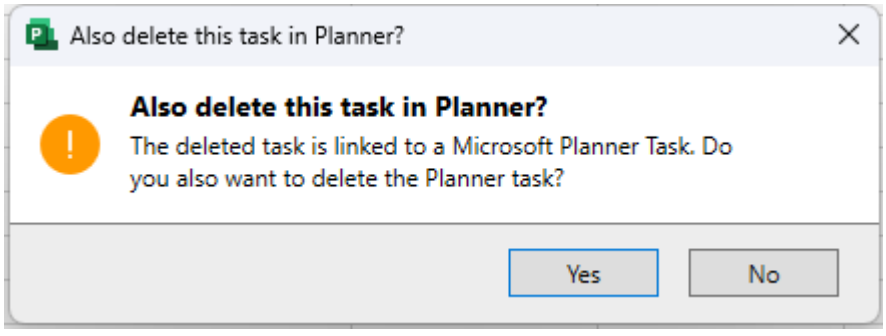
It shows the changes of the % Complete and Bucket column. A task that was deleted in Planner is marked with the delete icon.

Deleting a task in Planner does not delete it in Project. It only removes the link from the Planner Link column.

Select the tasks you want to accept and click Accept. The tasks are updated then.

2.7 Delete a Planner task from Project

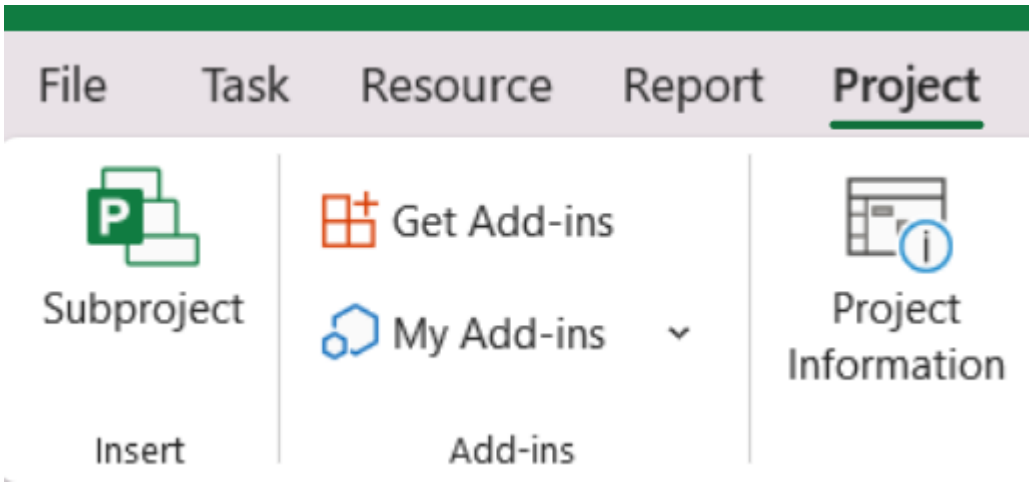
If you delete a Project task that is linked to a Planner task, the add-in asks whether the Planner task should be deleted too.



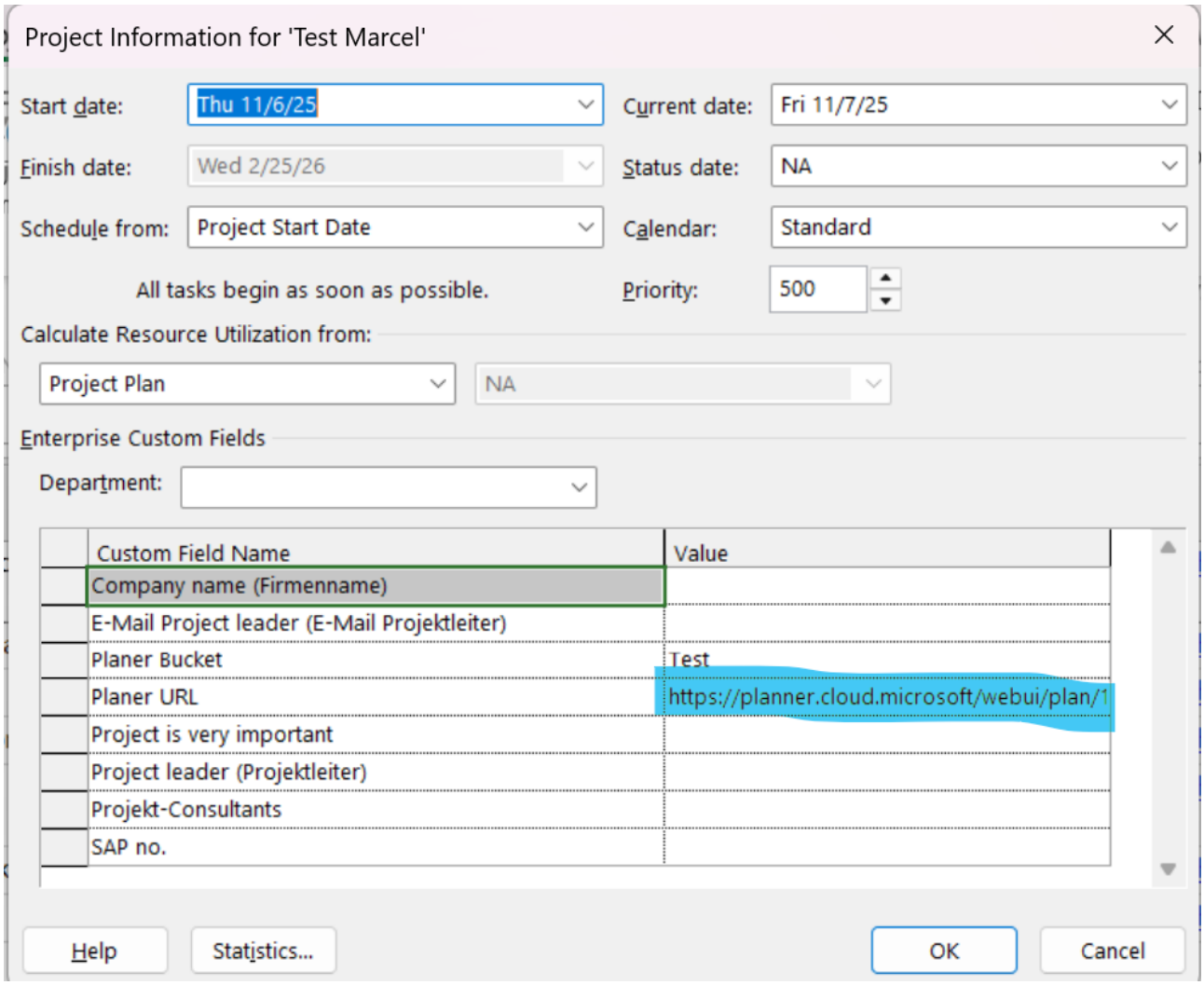
Yes deletes the task in Planner, No keeps it there.

2.8 Change the target plan

To change the target plan, open Project Information on the Project tab.



Remove the Planner URL from the field on project level and click OK.

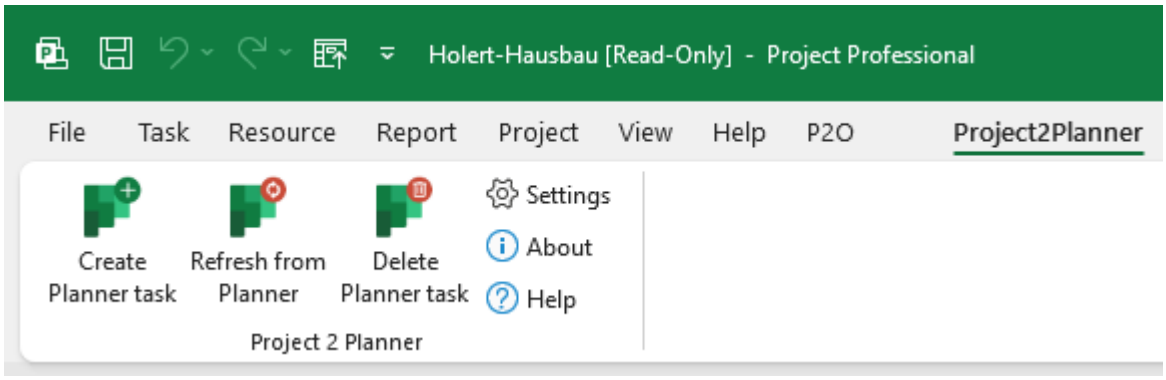


The next time Planner tasks are created, the target plan can be selected again.

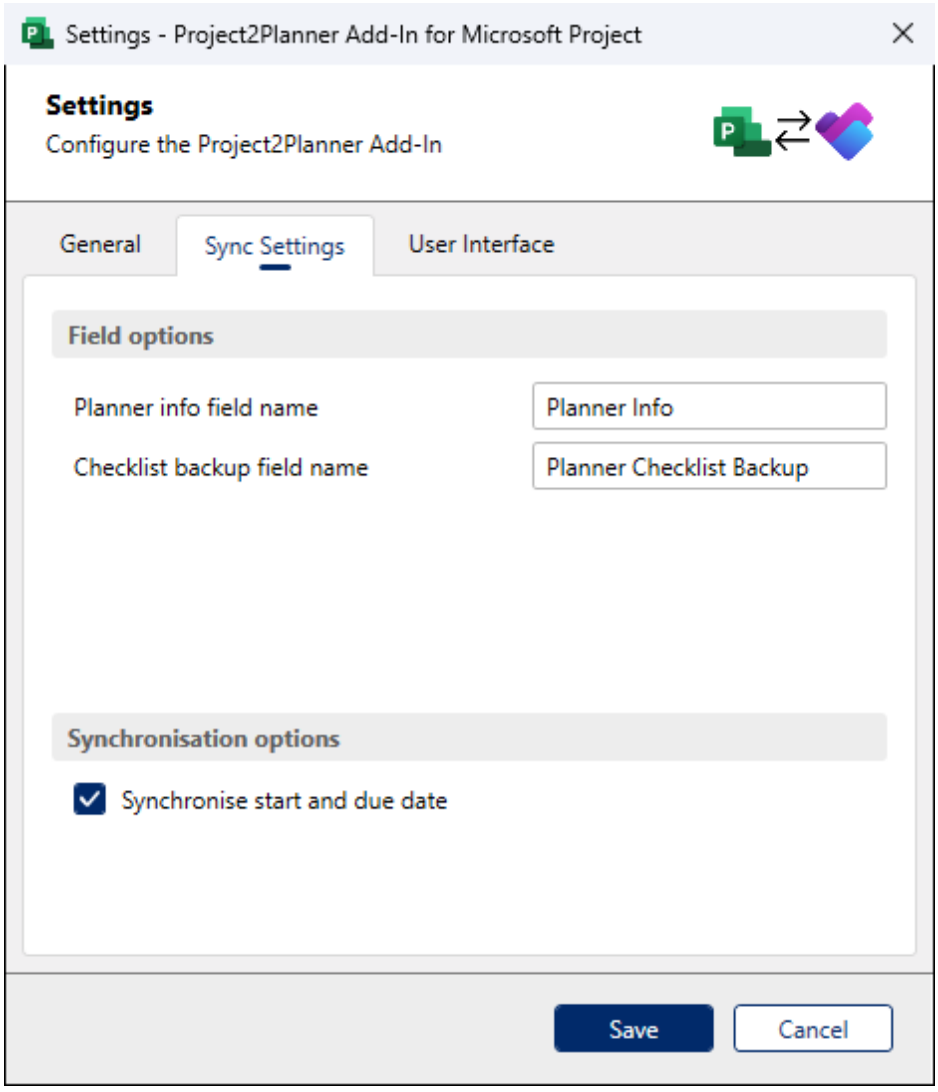
3. Multiple Planner plans

3.1 Configure the fields

In this mode the add-in shows a third button in the ribbon, for deleting a task in Planner.



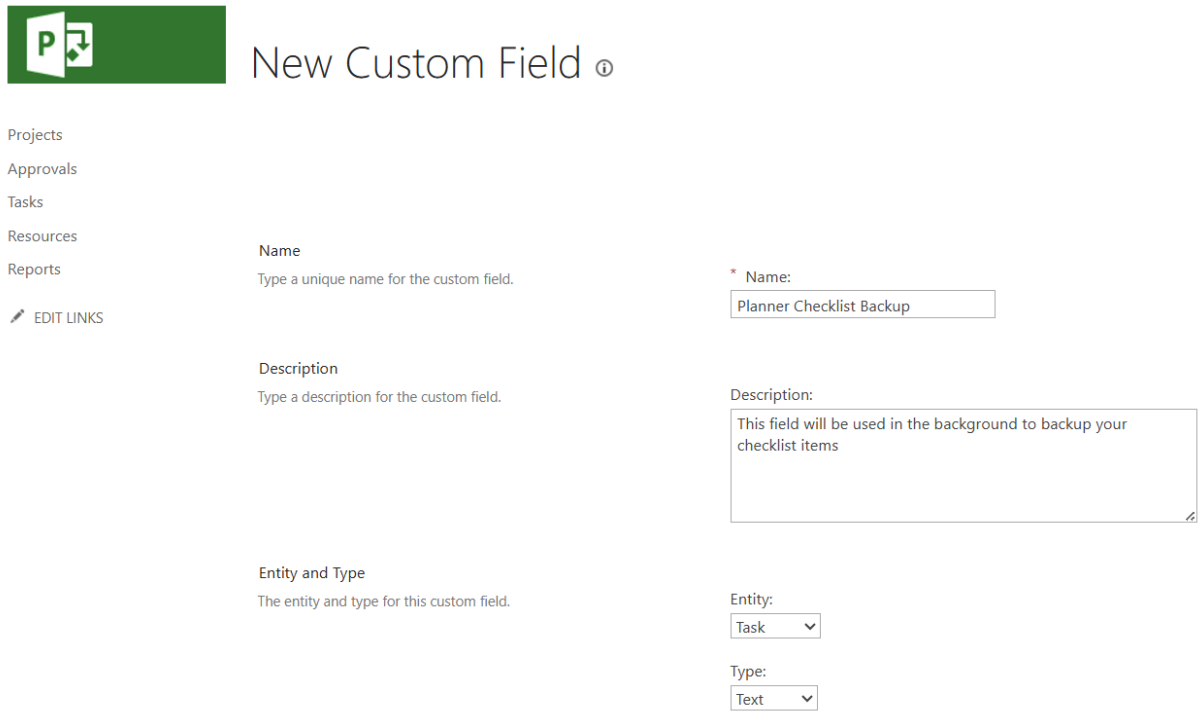
Open Settings.



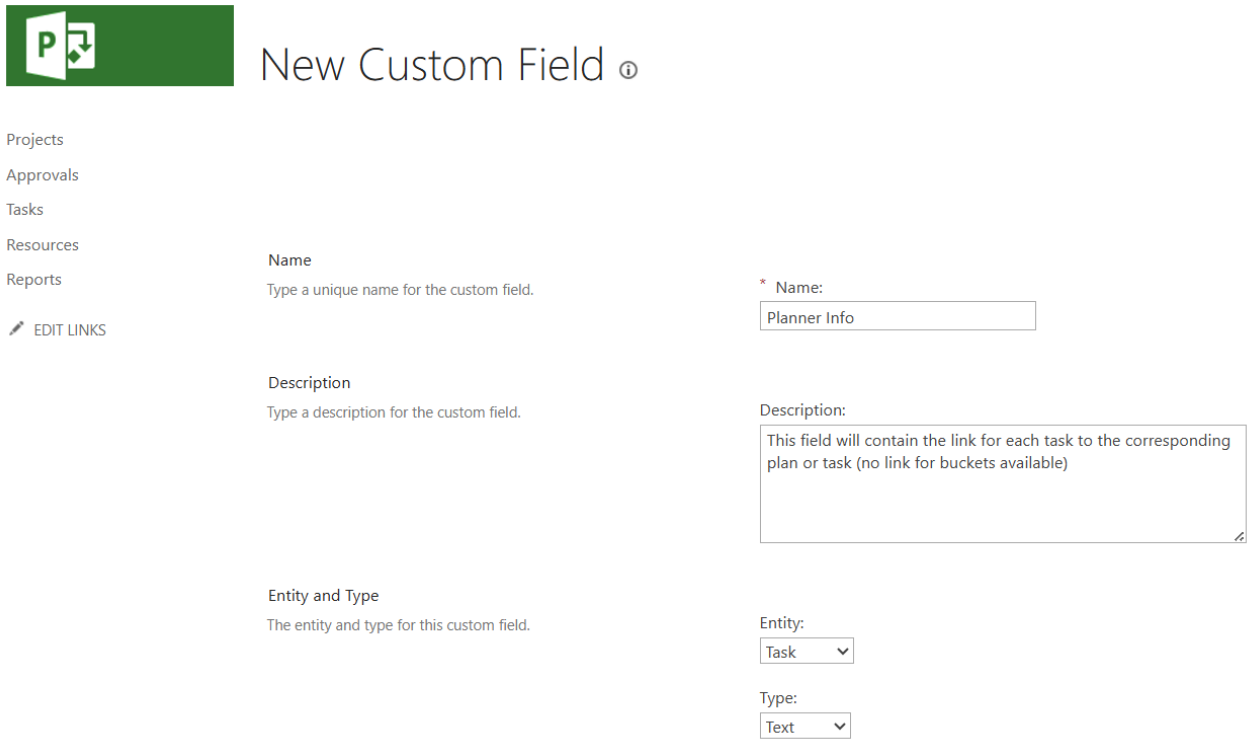
3.2 Prepare the fields

This mode needs two task fields, Planner Info and Planner Checklist Backup. With Microsoft Project on its own they are local custom fields of the project file, created as described under Configure the fields in Microsoft Project. The screenshots below show them as enterprise custom fields on a Project Server.

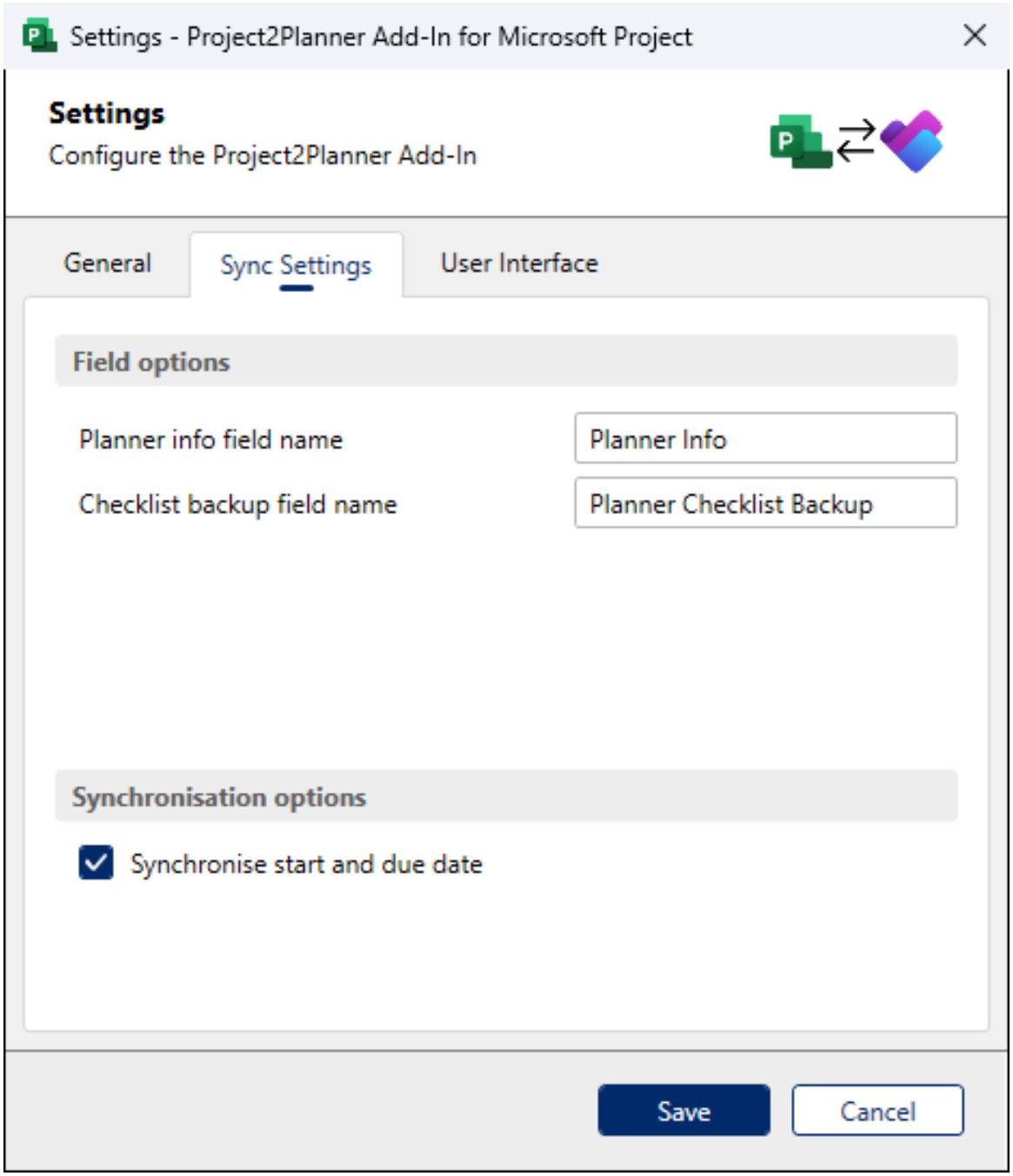
Create the project enterprise custom field Planner Checklist Backup.



Create the field Planner Info as well, then restart your Microsoft Project desktop app.

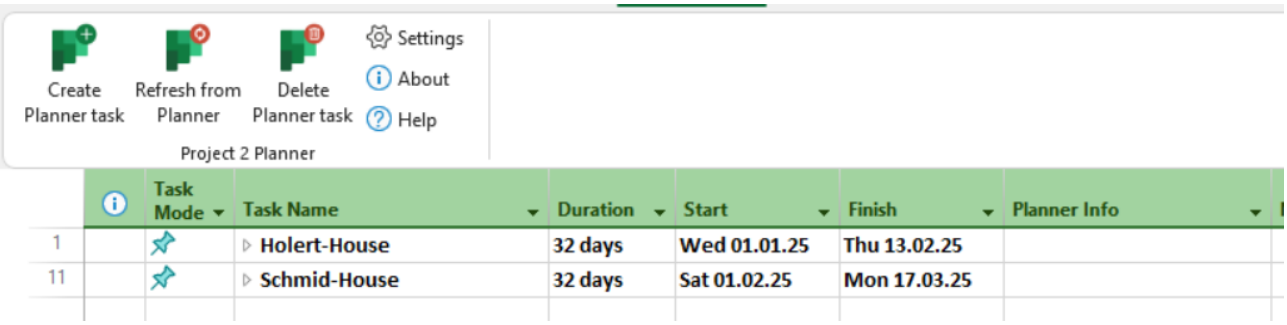


Open Project2Planner, then Settings, and verify the field names on the Sync Settings tab. Click Save.



3.3 Create Planner plan tasks

Create a project and, for each Planner plan, one task. Copy the URL of the plan into the Planner Info field of that task; the link has to contain planId=.



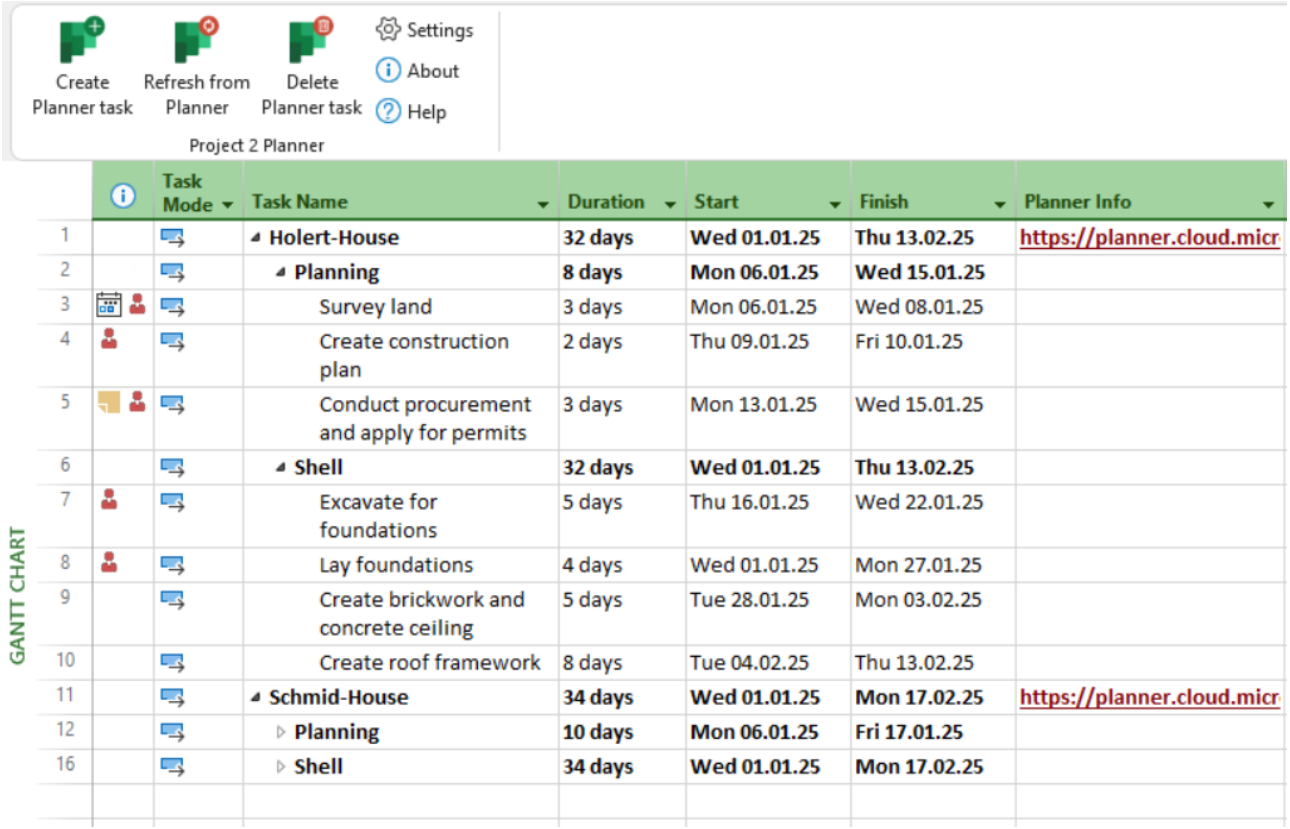
	Task Mode	Task Name	Duration	Start	Finish	Planner Info
1		Holert-House	32 days	Wed 01.01.25	Thu 13.02.25	
11		Schmid-House	32 days	Sat 01.02.25	Mon 17.03.25	

Subtasks of those tasks represent the Planner buckets. Create one task per bucket, here Planning and Shell.



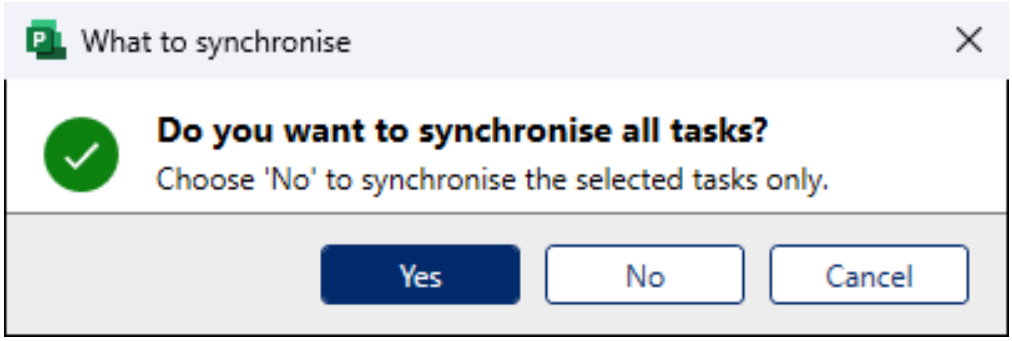
	Task Mode	Task Name	Duration	Start	Finish	Planner Info
1		Holert-House	32 days	Wed 01.01.25	Thu 13.02.25	https://planner.cloud.micr
2		Planning	8 days	Mon 06.01.25	Wed 15.01.25	
6		Shell	32 days	Wed 01.01.25	Thu 13.02.25	
11		Schmid-House	34 days	Wed 01.01.25	Mon 17.02.25	https://planner.cloud.micr
12		Planning	10 days	Mon 06.01.25	Fri 17.01.25	
16		Shell	34 days	Wed 01.01.25	Mon 17.02.25	

Subtasks of the bucket tasks represent the Planner tasks.



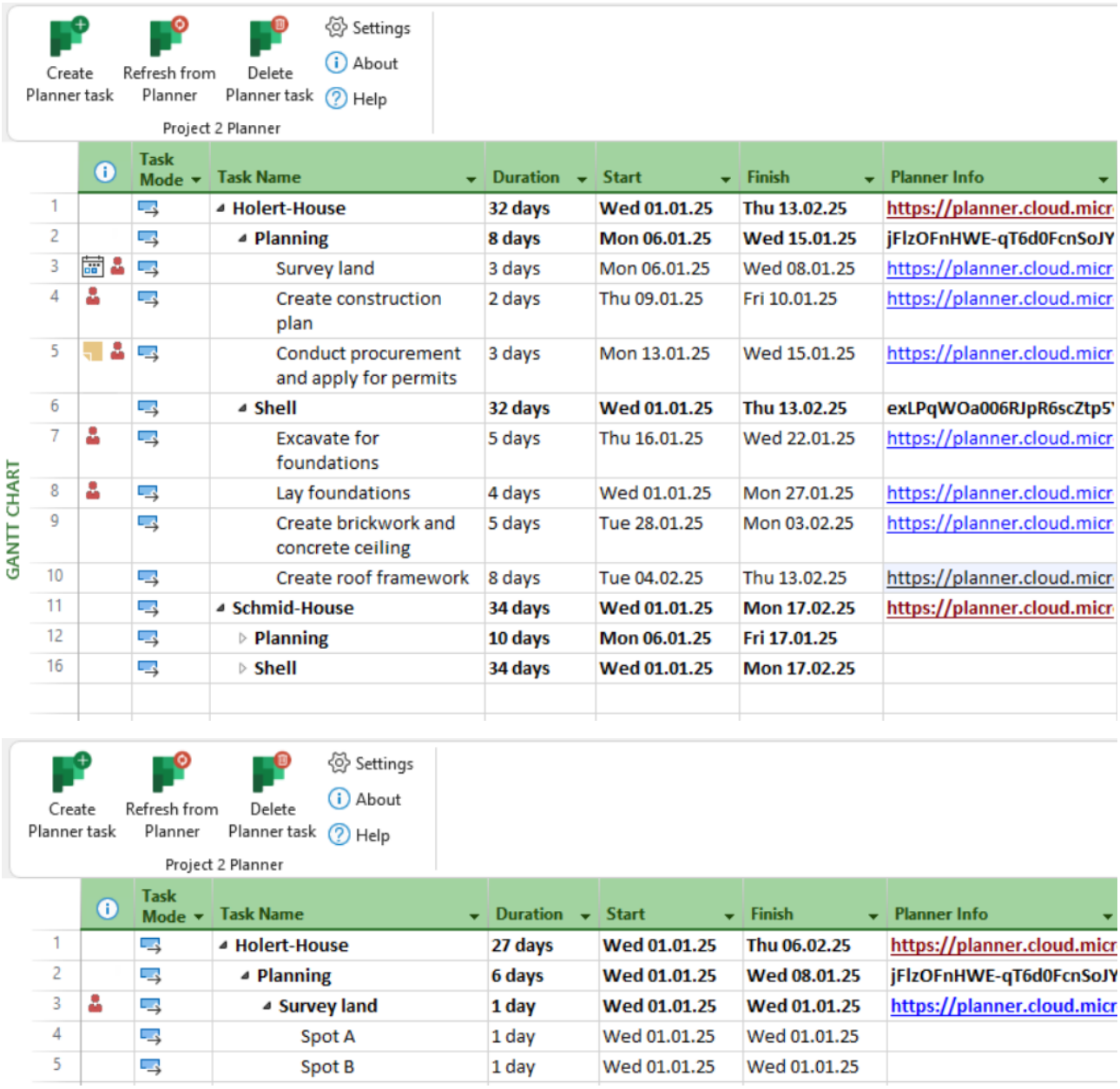
	Task Mode	Task Name	Duration	Start	Finish	Planner Info
1		**Holert-House**	**32 days**	**Wed 01.01.25**	**Thu 13.02.25**	https://planner.cloud.micr
2		**Planning**	**8 days**	**Mon 06.01.25**	**Wed 15.01.25**	
3		Survey land	3 days	Mon 06.01.25	Wed 08.01.25	
4		Create construction plan	2 days	Thu 09.01.25	Fri 10.01.25	
5		Conduct procurement and apply for permits	3 days	Mon 13.01.25	Wed 15.01.25	
6		**Shell**	**32 days**	**Wed 01.01.25**	**Thu 13.02.25**	
7		Excavate for foundations	5 days	Thu 16.01.25	Wed 22.01.25	
8		Lay foundations	4 days	Wed 01.01.25	Mon 27.01.25	
9		Create brickwork and concrete ceiling	5 days	Tue 28.01.25	Mon 03.02.25	
10		Create roof framework	8 days	Tue 04.02.25	Thu 13.02.25	
11		**Schmid-House**	**34 days**	**Wed 01.01.25**	**Mon 17.02.25**	https://planner.cloud.micr
12		**Planning**	**10 days**	**Mon 06.01.25**	**Fri 17.01.25**	
16		**Shell**	**34 days**	**Wed 01.01.25**	**Mon 17.02.25**	

When you click Create Planner task, the add-in asks what to create.



- Yes creates the tasks for all Planner plans you linked.
- No creates them only for the tasks you selected, and their subtasks.
- With a plan task selected, all buckets and tasks of that plan are created.
- With a bucket task selected, only that bucket is created, with all its tasks.
- With a task selected, only that task is created; its bucket has to exist already.

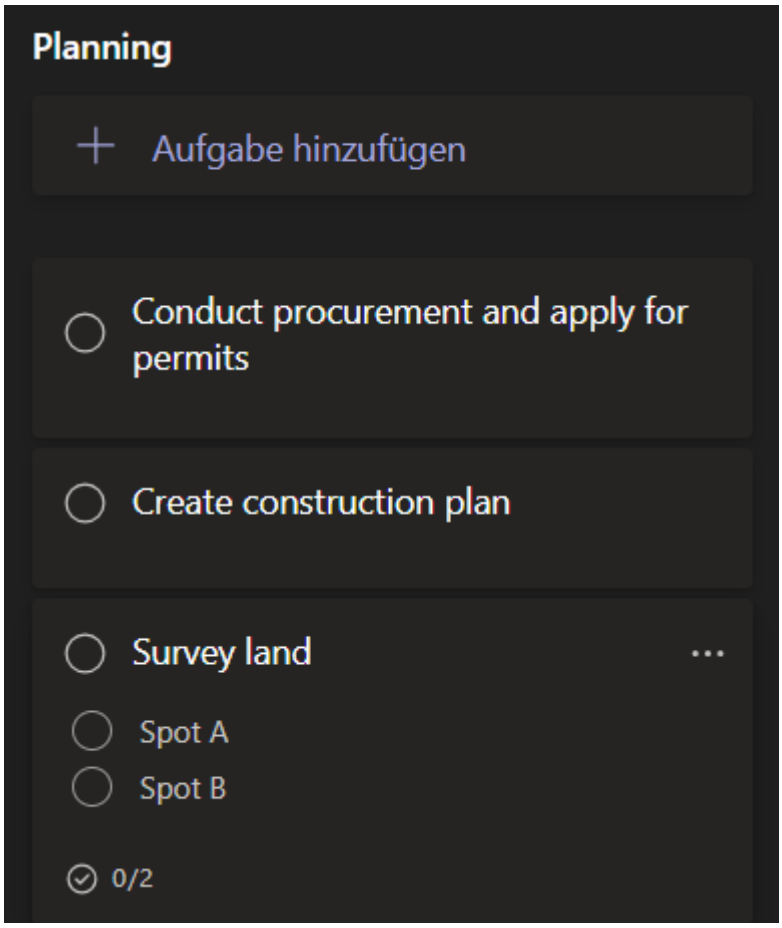
After a successful run the Planner Info field is filled: a bucket task holds the id of the bucket, a task holds the link to the Planner task.



	Task Mode	Task Name	Duration	Start	Finish	Planner Info
1		**Holert-House**	**32 days**	**Wed 01.01.25**	**Thu 13.02.25**	https://planner.cloud.micr
2		**Planning**	**8 days**	**Mon 06.01.25**	**Wed 15.01.25**	jFlzOFnHWE-qT6d0FcnSoJY
3		Survey land	3 days	Mon 06.01.25	Wed 08.01.25	https://planner.cloud.micr
4		Create construction plan	2 days	Thu 09.01.25	Fri 10.01.25	https://planner.cloud.micr
5		Conduct procurement and apply for permits	3 days	Mon 13.01.25	Wed 15.01.25	https://planner.cloud.micr
6		**Shell**	**32 days**	**Wed 01.01.25**	**Thu 13.02.25**	exLPqWOa006RJpR6scZtp5
7		Excavate for foundations	5 days	Thu 16.01.25	Wed 22.01.25	https://planner.cloud.micr
8		Lay foundations	4 days	Wed 01.01.25	Mon 27.01.25	https://planner.cloud.micr
9		Create brickwork and concrete ceiling	5 days	Tue 28.01.25	Mon 03.02.25	https://planner.cloud.micr
10		Create roof framework	8 days	Tue 04.02.25	Thu 13.02.25	https://planner.cloud.micr
11		**Schmid-House**	**34 days**	**Wed 01.01.25**	**Mon 17.02.25**	https://planner.cloud.micr
12		**Planning**	**10 days**	**Mon 06.01.25**	**Fri 17.01.25**	
16		**Shell**	**34 days**	**Wed 01.01.25**	**Mon 17.02.25**	

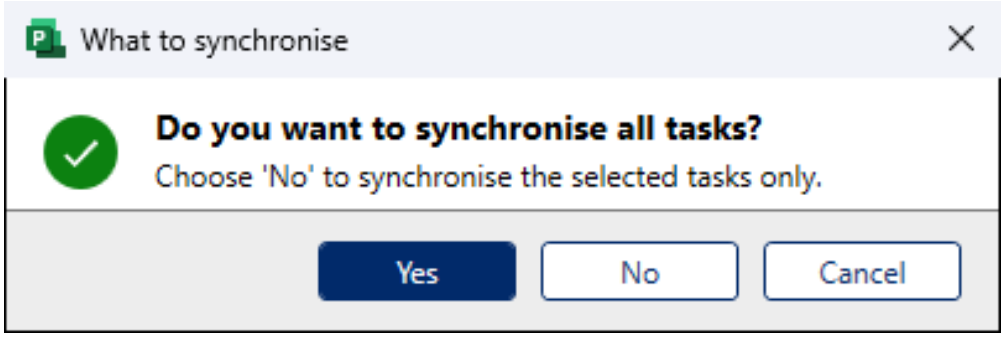
	Task Mode	Task Name	Duration	Start	Finish	Planner Info
1		**Holert-House**	**27 days**	**Wed 01.01.25**	**Thu 06.02.25**	https://planner.cloud.micr
2		**Planning**	**6 days**	**Wed 01.01.25**	**Wed 08.01.25**	jFlzOFnHWE-qT6d0FcnSoJY
3		**Survey land**	**1 day**	**Wed 01.01.25**	**Wed 01.01.25**	https://planner.cloud.micr
4		Spot A	1 day	Wed 01.01.25	Wed 01.01.25	
5		Spot B	1 day	Wed 01.01.25	Wed 01.01.25	

Subtasks below a task that represents a Planner task are added as checklist items.



3.4 Update Planner plan tasks

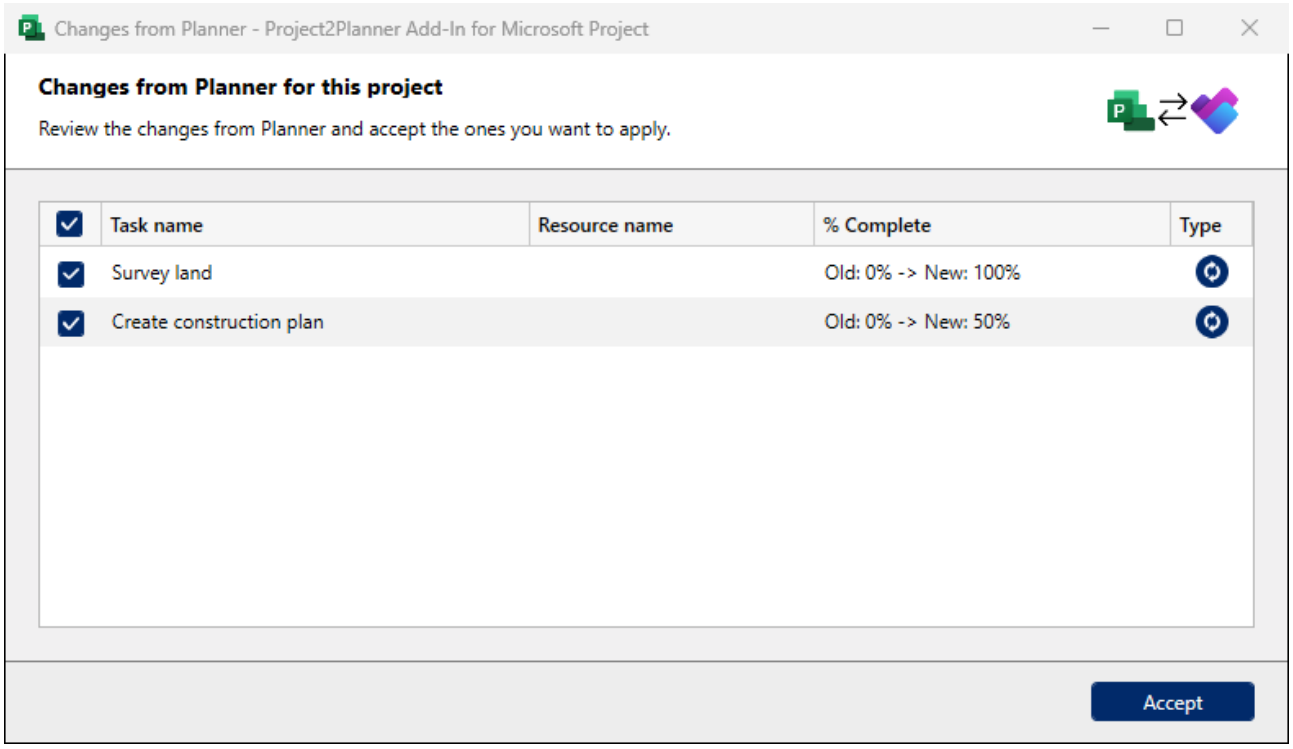
To update your Planner items, click Refresh from Planner.



- Yes refreshes all Planner plans you linked.
- No refreshes only the tasks you selected, and their subtasks.

If the progress of one or more Planner tasks differs from Project, the update dialog opens and lists them. Planner is the leading system for the progress in this mode: Refresh from Planner never writes

the % Complete from Project to Planner. Only a new Planner task takes over the % Complete of its Project task when it is created.



Select the tasks you want to accept and click Accept. The tasks are updated then.

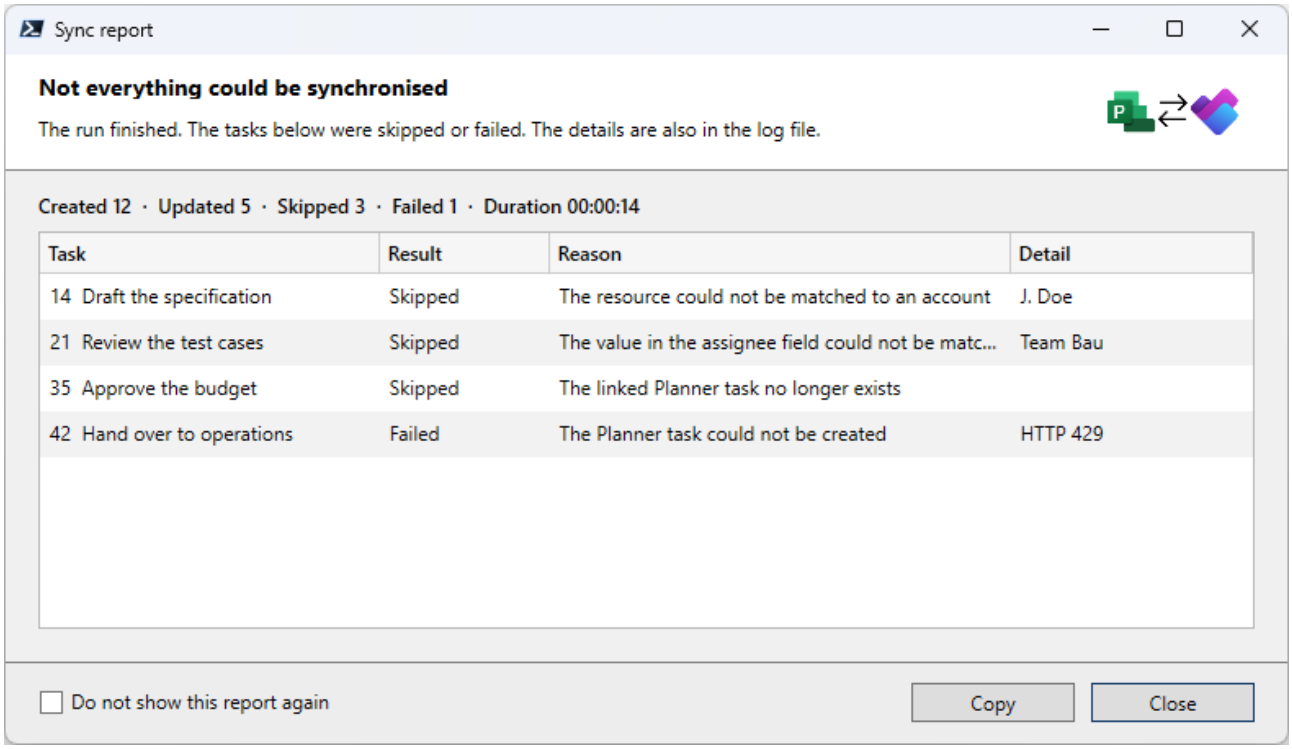
4. General

4.1 Synchronised fields

- **Start and finish date** — can be switched on and off in the settings.
- **Task name**
- **Notes**
- **Priority** — set to low (0-250), medium (251-500), important (501-750) or urgent (751-1000).
- **Resource name** — added as the assignee of the Planner task.
- **% Complete** — Single Planner plan: from Project to Planner when you create or update Planner tasks, and from Planner back to Project when you accept the change in the Changes from Planner dialog. Multiple Planner plans: from Planner back to Project when you accept the change in the update dialog; a new Planner task starts with the value from Project.
- **Bucket** — from the configured field, on project level for all tasks or on task level per task.

4.2 Sync report

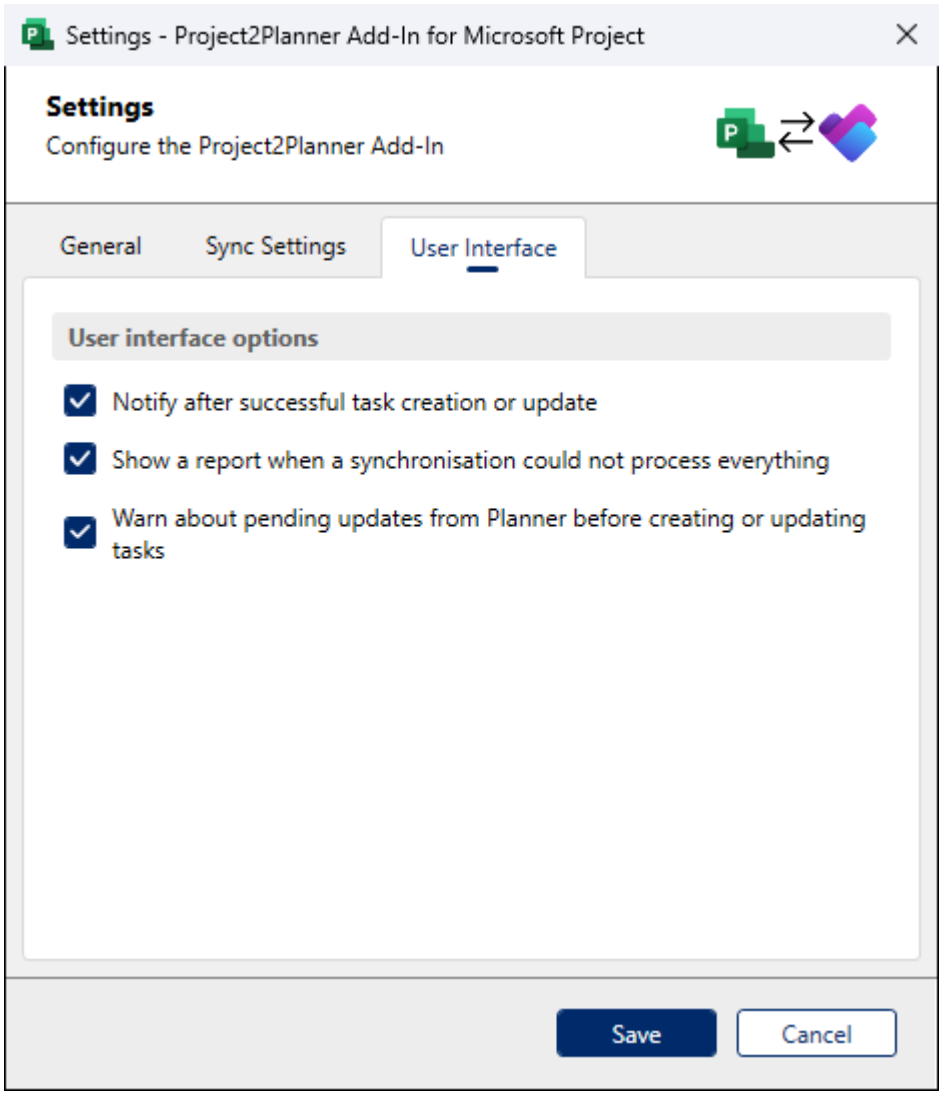
A run does not always manage everything: a resource cannot be matched to an account, the linked Planner task no longer exists, or Planner refuses a task. The add-in then shows a report after the run instead of the success message, naming every task it skipped or could not write, with the reason.



Copy puts the whole report on the clipboard, for example to attach it to a support request. "Do not show this report again" switches the dialog off; the same information stays in the log file either way.

4.3 User interface options

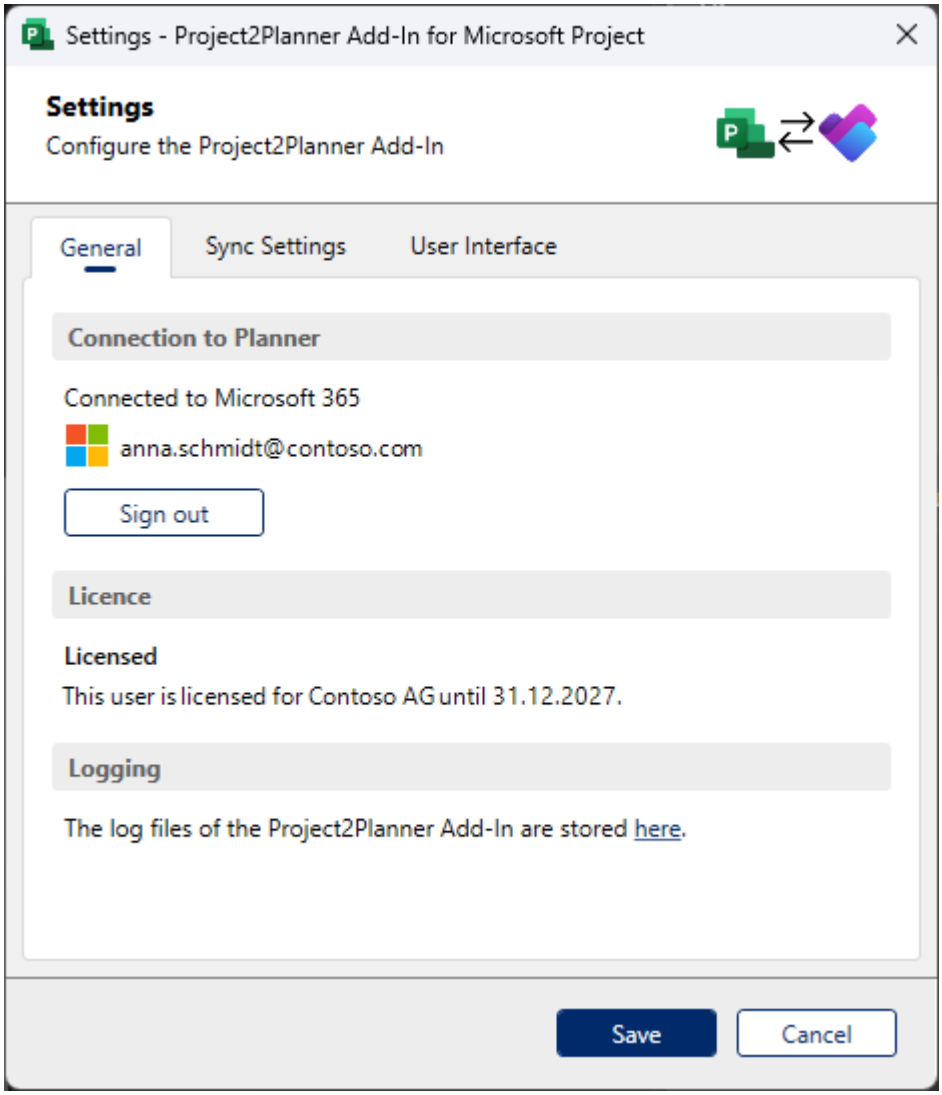
The User Interface tab of the settings decides which messages you see. All three options are switched on by default.



- Notify after successful task creation or update — the message after a run that did everything.
- Show a report when a synchronisation could not process everything — the report described above.
- Warn about pending updates from Planner before creating or updating tasks — the warning described under Create Planner tasks.

4.4 Licence

Project2Planner is licensed per named user. The General tab of the settings shows whether you are licensed and until when.



Without a licence the add-in can be used for an evaluation period of 30 days and shows the remaining days once a day. After the evaluation period, and once the licence of your organisation has expired, synchronisation is refused and the dialog names the reason; working with the project itself is not affected. To have a user licensed, send the user principal name to sales@holert.com.

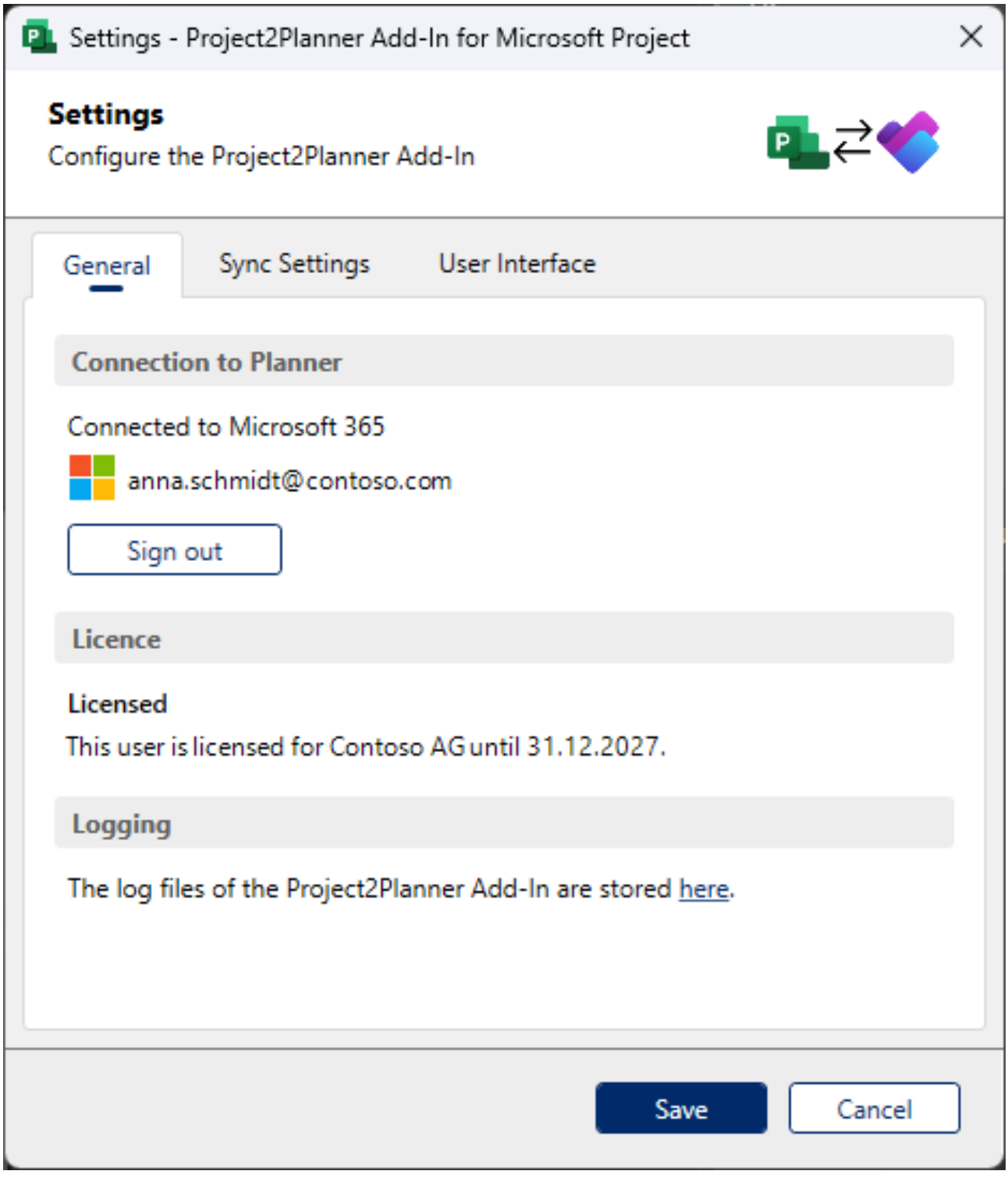
4.5 Find the logs

The add-in logs each step it takes. A log holds the detailed error messages and the technical information that helps support, and one log file is written per session into your local app data directory. To open it, go to Settings, General and follow the link in the Logging section.

The log files are deleted automatically after 90 days. They are only stored on your computer and are not sent to Holert.

4.6 Sign out

Go to Settings, General and click Sign out. The next time you use the add-in it asks you to sign in again.



Related documents

- **Admin Guide —** Project2Planner Admin Guide, installation and configuration file
- **Security and Trust —** Project2PlannerSync Security and Trust

Contacts

- **Support —** Holert service desk, support@holert.com
- **Licensing —** sales@holert.com
- **Product owner —** Maximilian Münst, Holert GmbH