What method do you use for planning and record keeping?
Microsoft Planner

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Agenda

- Introduction
- Quick Start
  - Sign in
  - Create plans
  - Manage tasks
  - View plans and get updates
  - Integration with other apps
  - Set up your mobile apps
Learning Objectives

• Able to select the appropriate tool for project management.
• Familiar with basic functions MS Groups and To Do.
• Comfortable with managing members and tasks on Planner.
Project, Planner, or To Do?

I have a project

- Team
- Solo

Analyze the complexity

- simple
  - Planner
- complex
  - Project

To Do

Tasks
To Do

My Day
Monday, June 14

Suggestions

Tasks that seem important
- Book flight/train ticket
- Sublet current apartment

Potential tasks
- Today you said
  Matt and I will send you the document by tomorrow noon.
  - Update on DegreeWorks - training
- 31 days ago you said
  If you can't make it to this session, I'll let you know when the training is off...
  - PW: Planner Training

Earlier
- Update KB articles
  - Tasks: • Overdue, Fri, May 28
- Kin Clinic Tues/Thurs 4:30 P.M.
  - Flagged Emails: • Overdue, Tue, May 11
- Update training slides
  - Sara TEST group for training: • Overdue, Fri, April 30
Planner

- Organize teamwork with intuitive, collaborative, visual task management.
- Create plans, assemble and assign tasks, share files, communicate and collaborate with other users, and receive progress updates via various means.
Microsoft 365 Groups

• Groups in Microsoft 365 let you choose a set of people that you wish to collaborate with and easily set up a collection of resources for those people to share. Resources such as a shared Outlook inbox, shared calendar or a document library for collaborating on files.
Use Microsoft 365 Groups

- Roles:
  - Owners: omnipotent (max 100/group )
  - Members: can access everything, cannot change group settings (max 1000/group)
  - Guests: people outside McGill, same access as members

- Shared inbox (50GB)
- Shared calendar
- SharePoint document library (25TB)
- Shared OneNote Notebook
- SharePoint Team Site
- Planner
Create/Join Microsoft 365 Groups

• OWA

• Outlook

• Public (can be joined by anyone within McGill)
• Private (membership needs to be approved)
Leave/Delete Groups

- Log in on OWA (mcgill.ca/email)
Access Planner

- [https://tasks.office.com/](https://tasks.office.com/)
Create a plan

• Select **New plan** in the left pane.
• Type a name.
• Link to an existing group or skip the link to create a new group.
• Make the plan public or private.
• Enter a group description (optional)
• Create Plan.
Add people to a plan
Remove people from a plan

Members

Enter name to add a member

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Remove
Guest access

1. A group owner adds a guest to the group.
2. The invited guest gets a welcome email from the group. If they do not already have a guest account with the organization, they need to accept this invitation to create one.
3. In the welcome email, under Read group files, select the Access files link and following the instructions to create a guest account.
4. To access a plan, guests either need to use a specific plan URL or go to https://tasks.office.com/mcgill.onmicrosoft.com
Manage tasks

- Add tasks to a plan
- Fill in more details of the plan
- Label tasks
- Comment on a task
- Add attachments to a task
Create buckets to sort your tasks

Once you've created a bucket, you can **drag tasks into the bucket** to start getting organized.
View plan and get updates

View your plan’s progress

Get emails about tasks and due dates

Plan settings

Notifications

General  Group

Group email settings

Email is always sent to the group when a comment is made on a task.

- Send email to the group when a task is assigned or completed
  
  Only group owners can change this setting.
  
  To stop receiving any group messages, select “Don’t receive any group messages” in Group settings in Outlook.

Have Planner send me notifications when:

- Someone assigns a task to me. (Email, Teams, and mobile push)
- A task assigned to me is late, due today, or due in the next 7 days. (Email only)

Learn more
Use Schedule View

- Click on the plus sign to create a new task.
- Drag and drop the task to change the due date.
- Filter the tasks by keywords.
Integration with other Microsoft apps
See all your tasks in one place
Integration with other Microsoft apps
Set up your mobile app

MS Planner for Android/iOS:
× Delete plans
✓ Add a photo by taking it with your device's camera
Food for thought

• Users
  • Who are they? Get everyone on board.
  • Should they have access to view the whole plan and relevant document?

• How to encourage users to check Planner regularly?
  • Turn on notification on Planner.
  • Post comments on and attach files to tasks.

• Will Planner be accessed as a standalone web app or an integrated app on Teams?
  • Is there an existing Microsoft Group that can be linked to this plan?
  • If you plan to use the app on Teams, which channel in which team do you want to add it to?
Thank you!

Your feedback matters!