ALDRIDGE

MICROSOFT 365 OUTLOOK, PLANNER, & TO DO

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Microsoft To Do's

Microsoft To-Do is an intelligent task management app that makes it easy to plan and manage your day. It is a personal task management app that empowers users to track and focus on the things they need to get done.

The primary goal of a to-do list is to outline your priorities, helping you remember everything and enabling you to plan your tasks efficiently, so they are completed within the necessary time frame. Keeping an up-to-date to-do list provides peace of mind, as it clearly shows what needs to be done.

The app allows you to organize tasks into groups and lists. This feature facilitates sharing a project task list with colleagues, a grocery list with family members, or a camping gear list with friends, for instance. It is user-friendly enough for individuals who are not comfortable with digital technology.

- **A smart daily planner** - Set yourself up for success with My Day, intelligent and personalized suggestions to update your daily or weekly to do list. With both a Microsoft to do desktop app and mobile app available, it is easy to stay on task all day long.
- **Manage your to do list online** - A truly cross platform task management app. Whether you're at home using the desktop app or are using the mobile app on the go you can access your task list and stay organized.
- **Sharing made easy** - Sharing an online to do list can help keep you connected with friends, family and colleagues.
- **Make managing tasks easier** - Break tasks down into simple steps, add due dates, and set reminders for your daily checklist to keep you on track.
- **Outlook Tasks integration** - To Do is integrated with Outlook Tasks, making it easier to manage all your tasks in one place.
- **Access from anywhere** - Microsoft To Do is available for free, and syncs across iPhone, Android, Windows, and the web. To do list apps such as the Microsoft To Do app are the best ways to create a to do list on your phone. With Microsoft To Do you can easily create and sync your task lists across multiple devices, so you have your to do list available whether you are on your desktop, phone, or tablet.

Smart Lists

Smart Lists are My Day, Important, Planned, Flagged Email and Assigned to Me.

Smart lists automate task management in the To-Do app, providing a quick overview of upcoming tasks without needing to click through each list. Tasks can appear in multiple Smart Lists based on criteria like due date and importance, simplifying categorization and tracking without manual adjustments.

Smart Lists are the Icons on the left side for “filtering” your tasks to see just what you need at any given time.

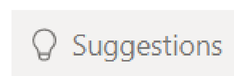
My Day and Suggestions

Use My Day to help focus on daily tasks. You can add new tasks directly to My Day, or add tasks from other lists, by selecting a task to view its details and then selecting **Add to My Day**. You can also use suggestions to pick tasks to add to My Day. To see suggested tasks, select the suggestions icon at the top of the My Day list.

The My Day smart list resets nightly, giving you a fresh start to add daily tasks. Any unfinished tasks are saved to your Tasks list and suggested again the next day.

1. Select **My Day**.
2. Select the **Today** lightbulb icon.
3. Choose the plus sign to add one of the suggested tasks to your **My Day** list.

   Or, open a list, right-click a task, and select **Add to My Day**.



Important Tasks – Use the icon to mark a tasks as Important. You can view all important tasks from this category.

Planned Tasks – Are Tasks that have a due date/reminder.

Assigned to me – Tasks assigned to you in To Do or Planner

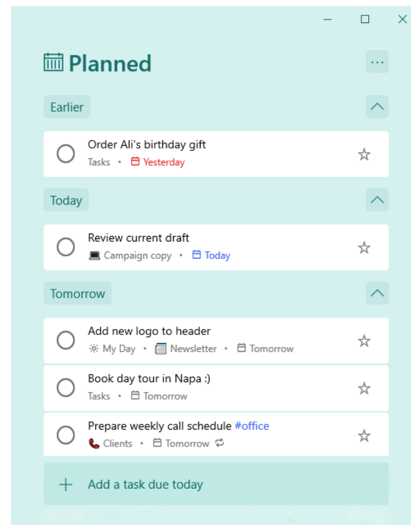
Tasks – List of all Tasks.

Add Tasks

A Task can be added within most areas of the To Do app or within Outlook.

1. Click on the Add a task icon.
2. Enter the name of the Task and press enter.

If you want to add other details to your task, click on the task to open the details pane on the right side. Follow the steps below.



Add Due Dates and Reminders

Use due dates and reminders to keep everything on track. Scheduled tasks will automatically appear in the Planned smart list, where you can see your tasks due today, tomorrow, and beyond.

Add a due date

1. Select a task to see its detail view.
2. Select **Add due date** and choose when the task will be due: today, tomorrow, next week, or a date you pick.

Add a reminder

1. Select a task.
2. Select **Remind me** and choose when you'll be reminded: later today, tomorrow, next week, or a date and time you pick.

Set a due date to repeat

1. Select a task.
2. Select **Repeat** and choose when your task will repeat daily, on weekdays, weekly, monthly, yearly, or a custom repetition.

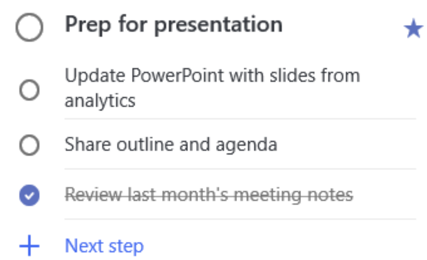
Add Steps

Use steps to break your larger tasks down in to smaller, more actionable pieces.

To add a step:

1. Click or tap the task to open detail view, select **+ Add step**, and begin typing your next step.
2. When you've finished, select **Enter** on your keyboard to save and close.

A counter located under each task's name shows the total number of steps for the task and how many have been completed up to that point.



Add Importance

Highlight your important tasks by starring them in each list. Once starred, you can view all prioritized tasks in the important smart list. You can also sort each list by importance to have starred tasks appear at the top.

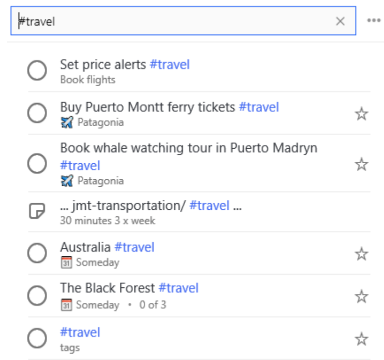
Add Notes

If you have any extra information you'd like to add to your task, you can **Add a note**. Select the task to open detail view and tap or click within the note to select it. Once selected, you can enter any extra information. When you've finished, select **Save** or **Done.**

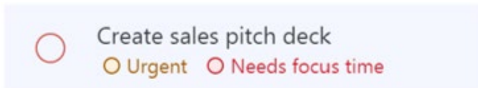
Add Tags

Keep your tasks organized across different lists by adding hashtags (like #work or #focus) to your tasks' names or in the **Notes**. You can add tags when creating tasks or when editing them.

You can quickly see all the tasks, notes, and steps that share a tag by selecting that tag or searching for it in the search bar.

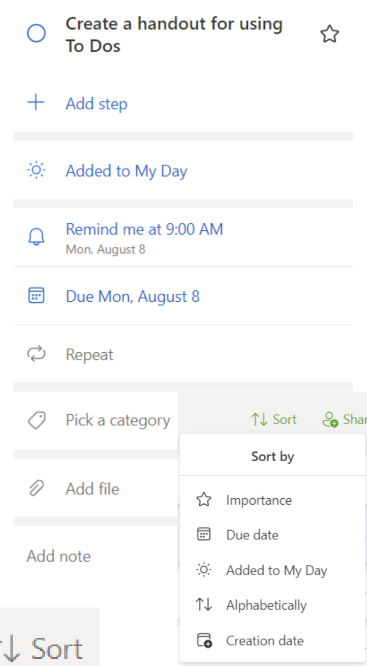


You'll see all the categories you've applied to a task in the list view.



To remove a category, select **X** on the category label, or move your cursor to the category selection and delete it.

Categories for Tasks from Flagged Email



Tasks generated from emails flagged prior to April 27th, 2020 will not automatically reflect the categories of their original emails. To synchronize the tasks with the email categories, simply unflag and then reflag the source emails. Note that if you apply new categories within To Do, these will replace any existing categories associated with the linked emails.

Sort Tasks

If you want to change how your Tasks are organized, you can Sort them.

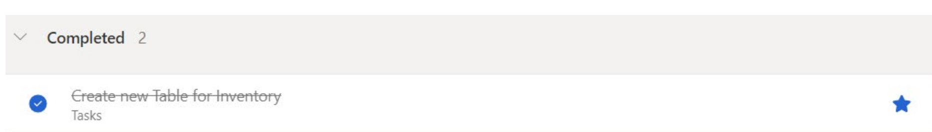
In all the views, look at the top right of the window for the icon. From the menu, you can choose the option that best suits your needs.

Mark a Task as Complete

When you finish a Task, you should mark it as Complete, so you know it is finished.

Click the circle icon on the left side of a Task.

This will cross out the task and move it to the Completed category.

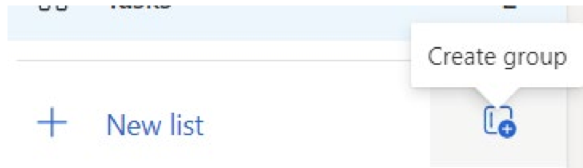


Working with Lists and Groups

Lists are great ways to sort your tasks into common projects or categories. If you have multiple tasks to work on that are related, create a List.

You could have multiple Lists “Grouped” together.

1. Select New list.
2. Type a name for the list.
3. Press Enter.
4. Add Tasks to the list.



Create a Group

1. Click on Create Group
2. Click and drag an existing list into the Group.

The New Planner in Microsoft 365

The new Microsoft Planner in Teams combines the ease of To Do, the collaborative tools of Planner, and the capabilities of Project for the web into one seamless experience.

Microsoft Planner in Teams has unveiled several new features to boost productivity and collaboration:

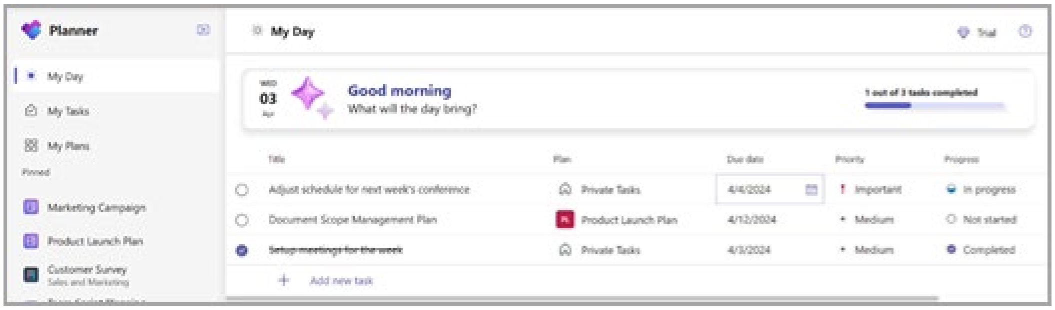
- **Unified Experience:** The new Planner combines the simplicity of Microsoft To Do, the collaboration features of Planner, and the power of Project for the web into a single, unified experience.
- **Streamlined Navigation**: The interface now includes three main sections: My Day, My Tasks, and My Plans, making it easier to navigate and manage tasks.
- **Enhanced Views**: New views such as Timeline (Gantt) view with dependencies, Goals view, and People view have been added to help you better visualize and manage your projects.
- **Premium Plans**: Users with an M365 license can access premium features like Sprint planning, custom fields, and more.
- **Copilot Integration**: The new Planner includes Copilot, which can help break down tasks into subtasks, identify work needed to meet project goals, and answer questions about project status.
- **New Icon**: A new Planner icon has been introduced, representing the expanded capabilities and vision of the app.

Use Planner within a Team Channel

1. Navigate to a Team Channel and Add a Tab by clicking the plus sign.
2. Click the Planner app.
3. Create a new plan or connect to an existing plan.

My Day

My Day is a clutter-free focus space that helps you stay on top of tasks that you want to focus on today. Tasks from My Tasks and personal plans that are due today will show up in My Day. You can also create tasks that you feel are important and may need your attention.



Your daily dashboard:

- **Handpicked priorities**: Determine and add your main tasks for the day.
- **Auto-population**: Tasks from My Tasks and personal plans **that are due today automatically appear** on My Day, keeping you on top of important deadlines.
- **Prioritize and work on these tasks**: Once the tasks are on My Day, you can prioritize the tasks in the order you want to accomplish them today.
- **Start fresh in My Day each day**: My Day clears itself every night, so you can start the next day with a blank slate and personalize your day. Any unfinished tasks in My Day that are left over before it clears will be available in the original Plan that they came from.

My Tasks

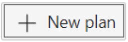
My Tasks: This view includes:

- **Private tasks**: Private tasks are a place for you to quickly jot down tasks at the speed of thought. This is a place where you can create tasks that do not belong to a plan yet. You can then further organize these tasks inside Plans by selecting More actions, which will help you move these unorganized tasks in definitive plans.
- **Assigned to me**: Includes all the tasks that have been assigned to you in Teams meeting notes, basic plans, premium plans, Loop component, and shared lists in To Do.
- **Flagged emails**: All your flagged emails from Outlook appear in the Flagged emails section. You can also navigate to the emails directly from the task by selecting the attachment.

- **All**: The All view provides an aggregation of all your individual tasks from Private tasks, Assigned to me, and Flagged emails. You can then filter and sort to meet your needs. For example, if you want to see all your tasks that are due tomorrow and are urgent, just apply the filter on this view and you will get a curated list of tasks.

My Plans

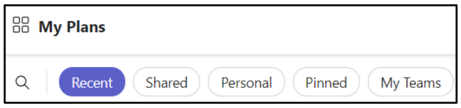
My Plans shows all the user's To Do lists, basic plans, and premium plans.



You can create a new personal or shared plan by clicking the icon at the top right.

The My Plans page in Planner shows all your plans, no matter where they were created. This includes lists created in To Do, plans created in Planner and Project for the web, Loop plans, plans from Teams meeting notes, and more.

The My Plans page provides five filters to help find the right plan or list:



- **Recent:** Shows your most recently accessed plans and lists.
- **Shared:** Shows your shared plans and lists.
- **Personal:** Shows your personal plans and lists.
- **Pinned:** Shows all plans and lists you have pinned.
- **My teams:** Shows all your plans that are shared with a Team's channel.

Planner View in Teams

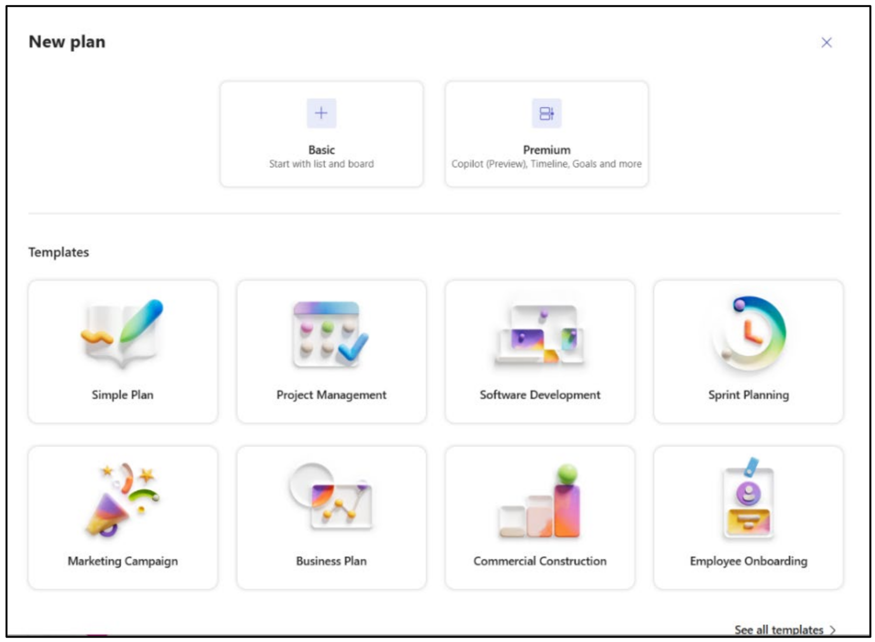
Microsoft Planner offers several views to help you manage and visualize your tasks effectively:

- **Board View**: This is the default view where tasks are organized into columns or "buckets." You can easily move tasks between buckets by dragging and dropping.
- **Charts View**: Provides a visual overview of your plan's progress, showing the status of tasks, the number of tasks assigned to each team member, and more.
- **Schedule View**: Displays tasks on a calendar, allowing you to see upcoming tasks and deadlines. You can drag and drop tasks to set dates.
- **Grid View**: Offers a detailed, data-centric view of your tasks, like a spreadsheet.
- **Timeline** (Gantt) **View**: Shows tasks in a timeline format, highlighting dependencies and helping you track project progress.

These views can help you and your team stay organized and ensure that tasks are completed on time.

Planner Templates

Microsoft Planner provides pre-made templates to give you a quick start on new plans, supporting various types.

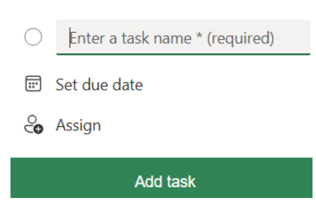


1. Once you click on a template, you will see a more complete view, note the specific template's sections and key benefits.
2. Select Back to view other templates -- or proceed as follows:
3. Add a title for your new plan.
4. Optionally, use the drop-down list to Add to an existing group.
5. Open and respond to Privacy and Sensitivity options.
6. Select the Create button to proceed into the new plan.

Managing Tasks

Add Tasks

Once you have a Plan created, whether it was a blank or template, you will want to start adding in new task or updating ones that already exist.



1. Click + Add task The new task panel will open. Enter a name for the task, a due date, and who it's assigned to. Click the Add Task button to create the task.
2. Once a Task has been added, you can click on it to open the Task dialog box. There are options to add a status, a priority, a due date, notes, checklists, attachments, and more. You can assign labels to color-code your tasks to the right of the item.

3. Close the Task window when finished (there is no Save button).

Notifications

Once you are assigned a Task, you will receive an email notification with a link to the Task. Once the date of when the Task is due approaches, you will receive an email notification.

Task notifications will appear in your Teams activity feed both on your desktop and in the Teams mobile app. You'll get a notification when:

- Someone else assigns a task to you.
- Someone else assigns an urgent task to you.
- Someone else makes a task assigned to you urgent.
- Someone else makes a task assigned to you not urgent.
- Someone else changes the progress of a task assigned to you.
- Someone removes you from a task's assignees.

Add Task Details

1. Select the task.
2. Select the Progress drop-down to change the progress: Not started, In progress, or Completed.
3. Type a Description.
4. Under Checklist, select Add an item and type the item you want to add to the checklist.
5. Select Add attachment and choose the type of attachment.

You can upload a **File**, provide a **Link** (URL), or attach a file in the **SharePoint** site associated with your plan's group.

6. Type a comment and select Send.
7. Comments go to the group's inbox, and you can also choose to receive these directly in your email inbox.
8. Select the Show on card checkbox to show your description, checklist, or attachment on the task card.
9. To quickly add similar tasks to your plan, select the three dots ... and then Copy task.
    - Type a new name.
    - Under Include, select the checkboxes for which items you want to include in the new task.
    - Select Copy.

Use Buckets

While a long list of tasks works, having multiple lists is more effective. Planner uses Buckets to organize tasks, starting with one Bucket named To Do. You can name buckets and add new or existing tasks by dragging them or clicking New Task under the bucket name. Utilizing Microsoft Planner buckets boosts productivity and organization. Here are the main benefits:

- **Task Organization**: Buckets allow you to group tasks by categories such as project phases, departments, or priority levels. This helps in breaking down complex projects into manageable parts.
- **Visual Clarity**: By sorting tasks into buckets, you get a clear visual representation of your workflow. This makes it easier to track progress and identify bottlenecks.
- **Flexibility**: You can move tasks between buckets as their status changes, providing a dynamic way to manage your tasks. For example, you can have buckets like “To Do,” “In Progress,” and "Completed".
- **Collaboration**: Buckets make it easier for team members to see what needs to be done and who is responsible for each task. This fosters better communication and collaboration.
- **Customization**: You can customize buckets to fit your specific needs, whether it’s for different types of work, project stages, or even brainstorming ideas.

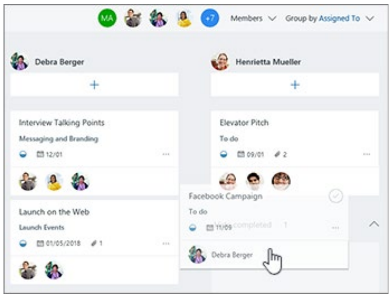
To Add a Bucket

1. Select Add new bucket.
2. Type a name that makes sense for your project: phases, types of work, and so on.
3. To add an emoji, press the Windows key plus the semicolon, and pick an emoji.

Organize Tasks

You can Filter or use Group By to organize the tasks in your list. By default, they are Grouped By Bucket, but you can change this at any time.

Assign People to Tasks

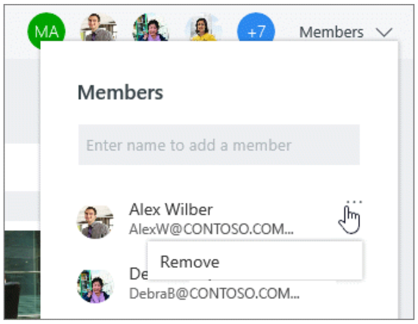


When you're ready to decide who's doing what, there are several ways you can assign tasks to people in Planner.

When creating a task, you have the option to assign it to someone. Start by adding a task name, then click on Assign to pick a team member from the list. If the person you need isn't shown, you can type in their name or email address in the search box to include a new individual.

A task can be assigned to multiple people. If more than one team member is working on a task, you can assign it to up to 11 individuals, so they all see it in their Assigned to me list. Once any team member completes the task, it is marked complete for everyone.

Change Assignments



You can also change the Board to be grouped by Assigned to, and then drag tasks between the columns for each person on your team.

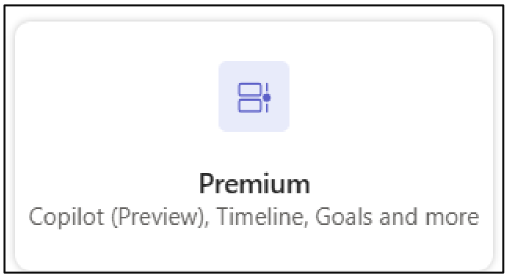
Need to Remove Someone?

If you no longer need someone on your plan, select the arrow next to the plan members, point to the person you're removing, select the three dots, and then choose Remove.

Microsoft Project Integration with Planner

Microsoft Project Online is a stand-alone app but can also be used with Microsoft Planner and To Do's.

A key challenge in team projects is estimating completion time, meeting deadlines, and prioritizing tasks, especially with many interdependencies. Effective work management tools are essential for boosting momentum and efficiency. Microsoft Planner addresses these issues with advanced features like Dependencies and Critical Path Identification in the Timeline view, making project management more accurate and efficient.



Creating a Premium Plan

You can use Microsoft Planner for project management. Here are some key features and steps:

1. **Advanced Task Dependencies:**
    - Microsoft Planner allows you to define complex task relationships, crucial for managing interconnected tasks efficiently.
    - Supported dependencies include:
        - Finish-to-Start (FS): Task 3 starts after Task 2 finishes (default dependency).
        - Finish-to-Finish (FF): Task 3 finishes when Task 2 finishes.
        - Start-to-Start (SS): Task 3 starts when Task 2 starts.
        - Start-to-Finish (SF): Task 3 finishes when Task 2 starts.
    - You can also add lead and lag times between tasks.
    - Set up dependencies by linking tasks and specifying the type of dependency.
2. **Viewing Critical Path on Timeline:**
    - The critical path is the longest sequence of tasks that determines the project's finish date.
    - Microsoft Planner's scheduling engine automatically calculates this for you.
    - Easily identify and prioritize tasks that impact your project's timeline.

To enable premium features in Microsoft Planner, you can start a 30-day free trial or request a premium license. Here's how you can do it:

Starting a 30-Day Free Trial

1. **In Teams**:
    - Open the Planner app within Microsoft Teams.
    - Click on the diamond icon in the upper right-hand corner.
    - Select “Try Project” to begin your free 30-day trial of premium features.
2. **On the Planner Website**:
    - Visit the Planner website.
    - Click on the “Try Project” button or select the “Timeline” menu option.
    - Follow the prompts to start your trial. Depending on your organization’s settings, you may need to request approval from your administrator.

Requesting a Premium License

If you want to continue using premium features after the trial, you can request a premium license from your administrator. This will give you access to advanced capabilities such as:

- Timeline (Gantt) View
- Dependencies
- Custom Fields
- Sprints
- Team Workload Management
- Goals View
- Copilot Integration

These features can significantly enhance your project management experience by providing more detailed insights and better task management tools.

Using premium features in Microsoft Planner can significantly enhance your project management experience. Here are some best practices to get the most out of these features:

1. **Utilize the Timeline (Gantt) View**:
    - **Plan Dependencies**: Use the Timeline view to map out task dependencies. This helps in visualizing the sequence of tasks and ensuring that critical tasks are completed on time.
    - **Adjust Timelines**: Regularly update and adjust timelines based on project progress to keep everyone aligned.
2. **Leverage Custom Fields**:
    - **Tailor Task Details**: Add custom fields to tasks to capture specific information relevant to your project. This can include priority levels, risk assessments, or any other custom data.
    - **Filter and Sort**: Use these custom fields to filter and sort tasks, making it easier to focus on high-priority items.
3. **Sprint Planning**:

   - **Define Sprints**: Break down your project into manageable sprints. This helps in setting short-term goals and maintaining momentum.
   - **Track Progress**: Use the Sprint view to monitor progress and adjust workloads as needed.
4. **Goals View**:
   - **Set Clear Objectives**: Use the Goals view to define and track project objectives. This ensures that all team members are aligned with the project's overall goals[1].
   - **Monitor Achievements**: Regularly review and update goals to reflect the current project status and celebrate milestones.
5. **Team Workload Management**:
   - **Balance Workloads**: Use the People view to see the distribution of tasks among team members. This helps in balancing workloads and preventing burnout.
   - **Reallocate Tasks**: Quickly reassign tasks if some team members are overloaded or if priorities change.
6. **Copilot Integration**:
   - **Break Down Tasks**: Use Copilot to break down complex tasks into smaller, manageable subtasks.
   - **Get Insights**: Ask Copilot for insights on project status and recommendations for improving efficiency.

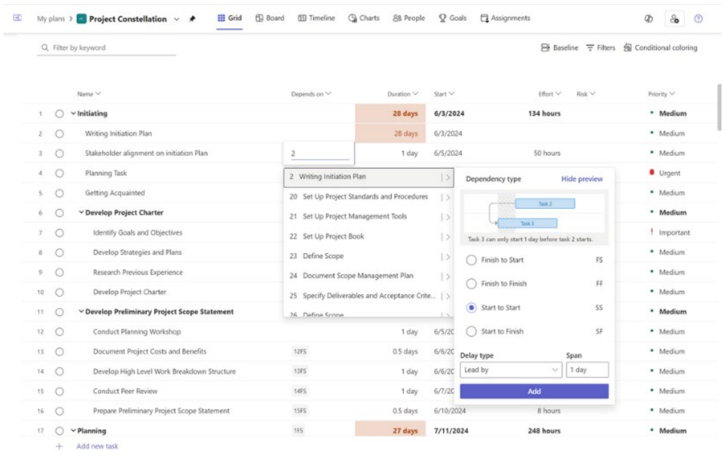
Advanced Task Dependencies

Microsoft Planner allows you to define complex task relationships, crucial for managing interconnected tasks efficiently. Here's an overview of the dependencies that are supported:

- Finish-to-Start (FS): Task 3 starts after Task 2 finishes (default dependency).
- Finish-to-Finish (FF): Task 3 finishes when Task 2 finishes.
- Start-to-Start (SS): Task 3 starts when Task 2 starts.
- Start-to-Finish (SF): Task 3 finishes when Task 2 starts.

Steps to Set Up Dependencies:

1. Create Tasks: Begin by listing all tasks within your plan.
2. Link Tasks: On a task row, under the 'Depends on' or 'Dependents (after)' column, click on the cell to choose the task the current task is dependent on followed by type of dependency (FS, SS, FF, SF).
3. Add Lead and Lag Times: You can also add lead and lag times through the same menu in days, hours, minutes, weeks or months.



Viewing Critical Path on Timeline

Understanding the critical path is essential for timely project completion. The critical path is the longest sequence of tasks that determines the project's finish date. Microsoft Planner's scheduling engine automatically calculates this for you, ensuring you can easily identify and prioritize the tasks that will impact your project's timeline.

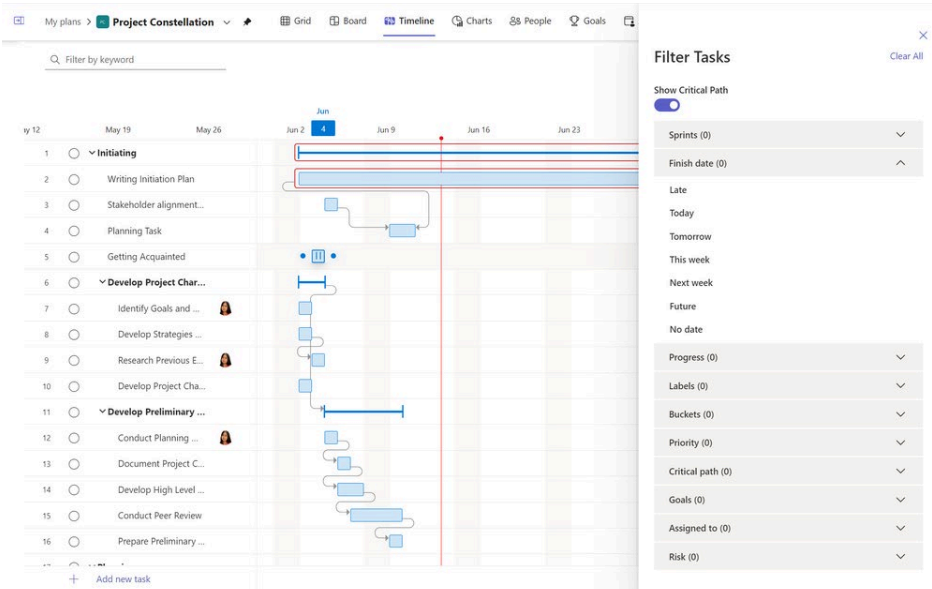
Example: Imagine you are organizing a conference:

1. Book Venue: 3/5 - 3/10
2. Write Invitation list: 3/5 - 3/15
3. Send Invitation: 3/10 - 3/20

If tasks have no dependencies, the critical path is the "Send invitation" task, as it ends at the latest and thus defines when the project will end. If there was a dependency "Write Invitation list" → "Send invitation," the critical path would be "Write Invitation list" and "Send Invitation," as their sequence defines the project's end date.

Steps to View Critical Path in Microsoft Planner:

1. Navigate to the Timeline view.
2. Toggle on the critical path filter to highlight critical tasks in red.

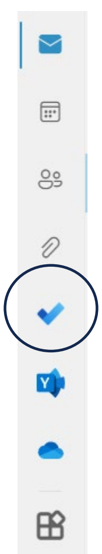


Outlook Tasks Integration

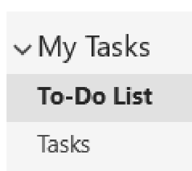
Outlook Online

In Outlook for the web, Microsoft To Do is easily accessible for you to track your tasks, share tasks, and keep yourself focused on what's important to you.

From Outlook Online, click on the To Do icon from the menu.



Outlook Desktop



Outlook Desktop also works with To Do's within Tasks.

Open Outlook Tasks and click on To-Do List, if necessary.

NOTE: viewing a Task from Outlook Tasks, will not show Steps.

When to use Microsoft To Do vs. Microsoft Planner

To Do	Planner
Manage individual tasks across To Do, Outlook, and Planner	Your organization has a Microsoft 365 subscription (business, enterprise, or education)
Make daily to-do lists	Manage and schedule teamwork visually
Share specific lists with teammates and friends	Use charts to track progress
	Collaborate across Planner, Teams, and Outlook using Microsoft Groups

Planner - To work with a team, start with Planner in the browser, the mobile app, or in Teams.

To Do - To work on individual tasks, or share lists, start with To Do.

The main difference between Microsoft Planner and Microsoft To Do is that the latter is used for adding and managing term-based tasks. On the other hand, Microsoft To Do is used for adding and managing personal tasks. Microsoft Planner schedules teamwork visually while Microsoft To-do makes daily to-do lists.

The best part is that you can use To Do and Planner together, to complement each other.

- In To Do, select Assigned to you to see tasks assigned to you.
- In Teams, see your To Do tasks and Planner tasks alongside each other using the Tasks app.

Working with Planner/To Do's in Outlook

Microsoft To Do is now integrated with Outlook.com. To Do is taking the place of Tasks and includes smart lists. Smart lists are filtered lists that make it easier to track tasks and organize your day. With To Do integration, you can quickly organize your tasks by adding them to My Day, marking them as important, or adding them to new lists that you create. There's even a list for tasks that you've assigned a date to.

See your Planner Schedule in Outlook Calendar

Plan your time better by seeing your Planner tasks on your Outlook calendar.

1. At the top of your Planner board, select the three dots ...
2. Select Add plan to Outlook calendar.

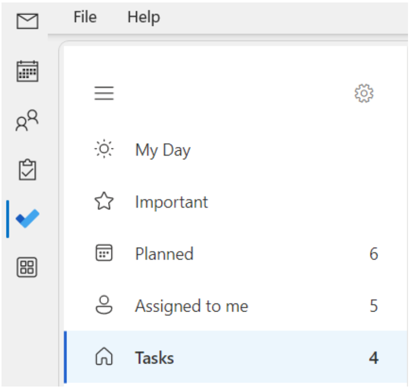
Notes:

1. If you don't see this option, the plan owner needs to publish the plan as an Outlook calendar:
2. The plan is now public for all members of the plan.

- Select the three dots ...
- Select Add plan to Outlook calendar.
- Select Publish, and then select Add to Outlook.

3. On the Subscribe from web tab, change the Calendar name if you like, and select Import.

View your plan and tasks in Outlook



1. Under Other calendars, select your plan.
2. Select a Planner task to see a quick view.
3. To see more details, select the View event arrow in the upper right.

Here you can see dates, progress, and a checklist summary.

You can also select Open this task in Microsoft Planner.

In Planner, you're able to edit this task as usual.