SmartDolphins

Microsoft Outlook 365

With To Do and Planner

Customized for BC Association of Aboriginal Friendship Centres

The New Outlook 365 - Built for today, designed for the future

Maximize your experience with the new Outlook for Windows, which offers the newest features, intelligent assistance from Microsoft Copilot, and a sleek, streamlined design. This updated version helps you stay connected, organized, and productive with its advanced capabilities and contemporary interface.

Outlook Premium is a premium version of Outlook.com that is included in a Microsoft 365 subscription. It includes advanced protection against phishing and malware, no ads, and other premium features for your Outlook.com account. If you have an Office 365 subscription, then you already have a premium Outlook.com account which is an ad-free Outlook.com account having a higher mailbox capacity.

Note: Limitation - The new Outlook provides only limited support for public folders. You should continue using the classic Outlook for window if you depend heavily on public-folder features such as creating, modifying, or deleting public folders in Outlook.

Choose what you're currently using for your email and calendar to learn how to start using new Outlook

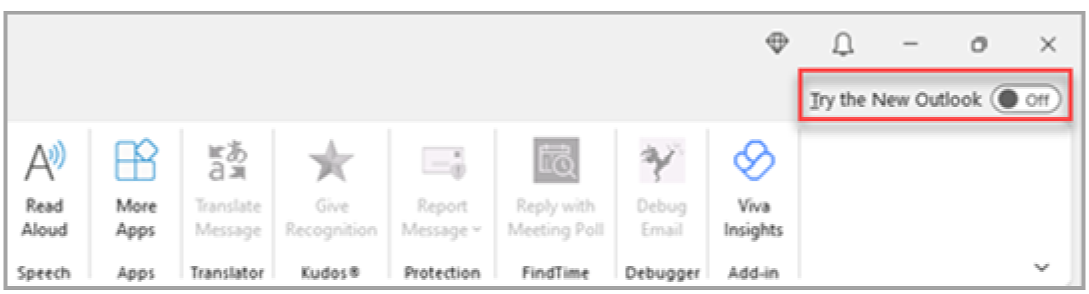
Tip: You can switch back whenever you want, just switch the toggle off in the new Outlook and it will automatically open the classic version.

Important: New Outlook for Windows supports Exchange-backed Microsoft 365 work or school accounts, Outlook.com accounts, and Gmail. Currently, the new Outlook for Windows does not support other account types like Yahoo!, iCloud, or other account types connecting through POP/IMAP protocols. New Outlook for Windows also does not currently support On-Premises, Hybrid, or Sovereign Exchange deployments.

Classic Outlook on Windows

If your accounts are supported in the new Outlook for Windows, you'll see a toggle in the upper right of classic Outlook to **Try the new Outlook**. Selecting this toggle will download the new app and let you switch to the preview.

New and classic Outlook for Windows feature comparison - Microsoft Support



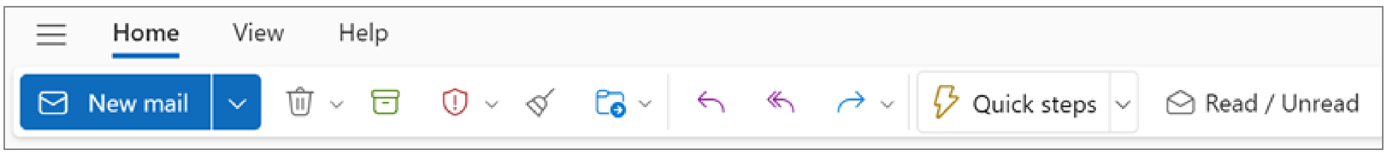
The new Outlook for Windows will launch into the account you have set as your default send account in Outlook. If Outlook can't sign you in automatically, manually type in the account and sign in.

New User Interface

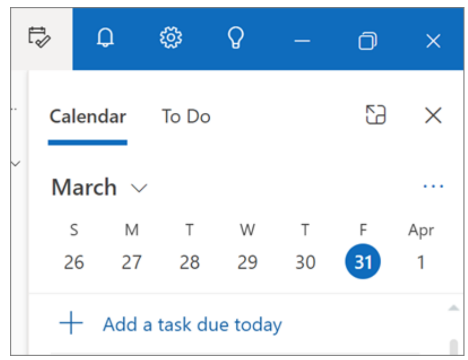
With the new Outlook there are a few changes to the user interface. At the top right you will find a mini toolbar with commands like Copilot, Settings and To Do's.

Ribbon

You can make the ribbon larger (the classic experience) or smaller (the simplified experience) using the dropdown arrow on the right side of the bar. If you want to personalize the commands you see in the simplified ribbon, select **Customize**.



Navigation Bar and My Day



On the left side you'll see the navigation bar, which makes it simple to switch to **Calendar**, **Contacts**, or any other app you frequently use. For quick access to your calendar or tasks without leaving the inbox, you can use **My Day** by selecting the icon in the **upper right**.

Emails

When creating a new email, the new Outlook for Windows offers a more streamlined and modern experience compared to the classic version. Here are some key differences:

1. **Simplified Ribbon**: The new Outlook features a minimalist ribbon with fewer icons and words, making it less cluttered and easier to navigate. You can still switch to the classic ribbon if you prefer more options.
2. **AI Assistance**: The new Outlook includes AI-powered suggestions for spelling, grammar, and tone, helping you write more effective emails.
3. **Integrated Features**: You can easily access OneDrive files, schedule email sends, and undo sent emails directly from the new email window.
4. **Personalization**: The new Outlook allows for more personalized layout options, such as adjusting the density of the interface to be Roomy, Cozy, or Compact.
5. **Settings Accessibility**: Settings are more conveniently located in the new Outlook, making it easier to adjust your preferences without digging through menus.

Overall, the new Outlook aims to provide a more efficient and user-friendly experience, especially for those using Microsoft 365 business accounts.

Create and add an email signature in Outlook on the web

Create a signature for your email messages that you can add automatically to all outgoing messages or manually to specific ones.

Favorites

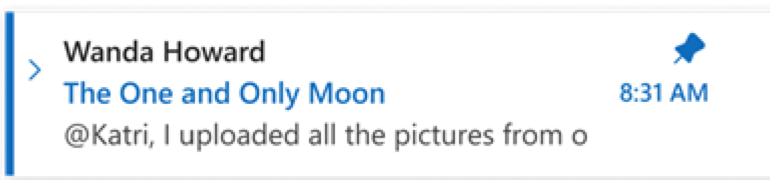
Favorites give visibility to folders that are otherwise buried in your mail folder list.

Favorites, a subset of your mail folders, appear at the top of the navigation pane. Using **Favorites** isn't a requirement for this system to work, but if you have a small screen, you can minimize the Navigation Pane and still successfully file your messages by dragging messages to the minimized bar, perform common searches, and navigate to the **Calendar**, **Contacts**, and **Tasks**.

It's considered best practice to have the following folders in your **Favorites**: **Inbox**, **1-Reference**, **Sent Items**, and **Deleted Items**.

Pin Emails

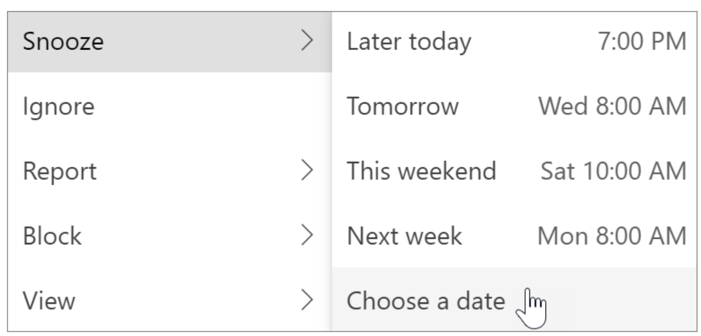
Do you ever have trouble tracking down that key email thread you're actively responding to? Or is there an email with key information you frequently refer to? Now, simply right-click any message and choose **Pin** and that email will appear at the top of your inbox, saving you time from having to go back and search for it.



Snooze Email

Sometimes email is very important, but not yet. With the Snooze feature, you can schedule a time for the email to be re-delivered to your inbox, appearing at the time you want it to, so you can handle it when it's the right time for you.

1. Right-click any message.
2. Click **Snooze** or select **Snooze** from the ribbon.
3. Then choose the time you want it to be delivered.



Schedule When to Send Email

In the New Outlook for Windows, you can delay the delivery of individual messages.

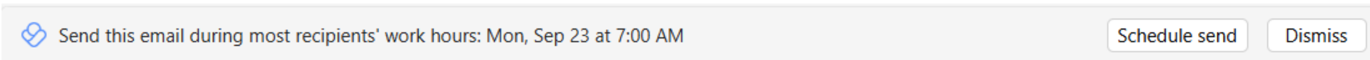
To delay delivery of an email in Outlook 365, you can follow these steps:

1. While composing a message, select the dropdown next to Send and choose Schedule send. Select a default option or set a custom time.

2. The message will remain in the Draft folder until the delivery time.

3. Alternatively, go to Options > three dots > Delay Delivery. Select "Do not deliver before" and set a date and time.

If you send an email outside of normal working hours, you will receive a message at the top about Schedule Send.

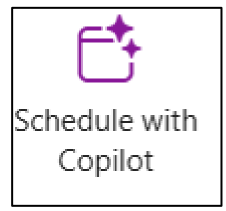


Schedule a Meeting from an Email with Copilot

Copilot makes it fast and easy to schedule a meeting from an email thread.

When you use the **Schedule with Copilot** option, Copilot analyzes the email and creates a meeting invitation for you, filling in a meeting title and agenda, and adding the email thread as an attachment. The people on the email thread are included as meeting attendees, and you can quickly review the invitation, add or change info, and then send it out.

Note: This feature is only available if you have a Microsoft 365 Copilot (Work) license.



1. Open an email conversation in Outlook.
2. In the toolbar, select Schedule with Copilot.

Note: The toolbar may look slightly different, depending on your settings.

3. Select Insert to accept the content Copilot has suggested (you can edit it in the next step, if needed).
4. Review the meeting invitation, make any changes you want to make, and when you're ready, select Send.

Sweep

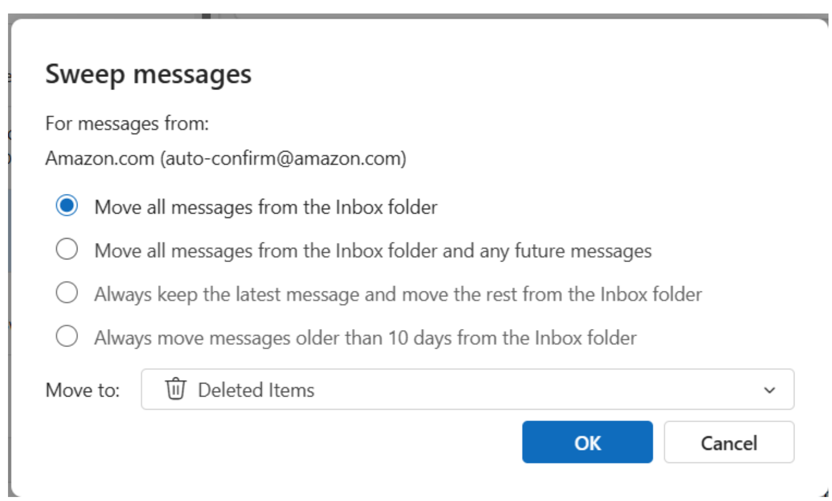
Clean up your inbox and keep your email organized with automatic filtering and sorting, and by using tools on the command bar like Sweep, Archive, and Move to.

Use Sweep to quickly delete unwanted email in your Inbox. Sweep gives you options to automatically delete all incoming email from a particular sender, to keep only the latest email, or to delete email older than 10 days.

1. Select an email message from the sender whose messages you want to delete.
2. On the menu bar, select **Sweep**.

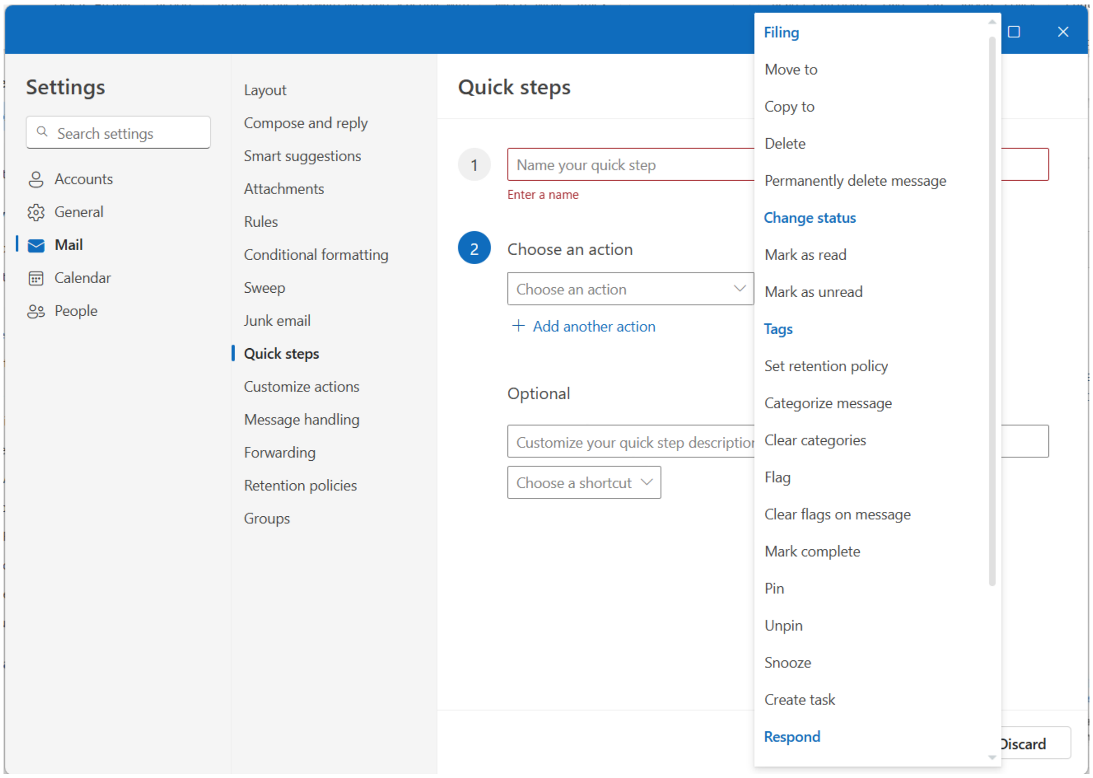
Note: The **Sweep** option isn't available from the following folders: **Junk Email**, **Drafts**, **Sent Items**, and **Deleted Items**.

3. Choose how you want to handle email messages from the sender you chose.
4. Select **Sweep** to perform the selected action.



Quick Steps

Quick Steps in the new Outlook allow you to automate a sequence of actions that you frequently perform, such as moving emails to a specific folder, flagging messages, replying with a meeting, etc. They are very useful for managing your inbox efficiently, reducing the time spent on repetitive tasks, and helping you stay organized.



For example, if you often move certain emails to a specific folder and forward them to a particular person, you can create a quick step to automate these actions in a click. Similarly, if you frequently categorize and flag emails for follow-up, quick steps can handle these tasks.

To create a quick step in the new Outlook app and Outlook online, this is what you need to do:

1. On the Navigation pane, select *Mail*.
2. On the *Home* tab, click *Quick steps*.

If you already have one or more steps in your Outlook, then click the dropdown menu arrow and choose *Manage quick steps*.

3. In the *Settings* window, click *+New quick step*.
4. **Name your quick step**. In the first field, enter a descriptive name for your new quick step:
5. **Choose an action**. Under *Choose an action*, select the desired action from the dropdown menu. This could be moving an email to a specific folder, pinning, marking complete, categorizing, etc.
6. **Set additional actions**. If needed, click *Add another action* to include more tasks in your sequence.
7. **Add description**. In the *Optional* section, you can add a tooltip description that will appear when you hover over the quick step in the ribbon. This helps you remember what each step does.

8. **Assign shortcut**. To create a keyboard shortcut, in the *Choose a shortcut* box, select the key combination you prefer. Available options include Ctrl + Shift + 5 through Ctrl + Shift + 9.

9. **Save your quick step**. When done, click *Save* to finalize your new quick step.

This way, you can easily create Quick Steps in the new Outlook app and web, saving time on frequent tasks. All the quick steps you've created will appear in the dropdown menu on the Outlook ribbon:

To apply a quick step to a given email, just do this:

1. Select the message of interest.

2. In the Outlook ribbon, choose the desired step from the dropdown menu. Alternatively, press the keyboard shortcut assigned to the quick step to apply it.

This will execute all the associated actions in one go.

Categories

Categories in Outlook allow you to manage items in many ways. There are three main types of categories that we recommend creating:

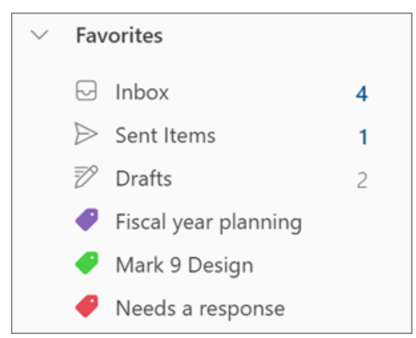
- Project (can include people)
- Topic
- Location or activity

Categories aren't a required aspect of this system, but they will make your life easier if you are diligent about using them. For example, they can help you more easily identify what you can do now and help you group similar tasks so that you can do them all at once.

To create categories, do the following:

- In any view, on the **Home** tab, in the **Tags** group, select **Categorize**, and then select **All Categories**.

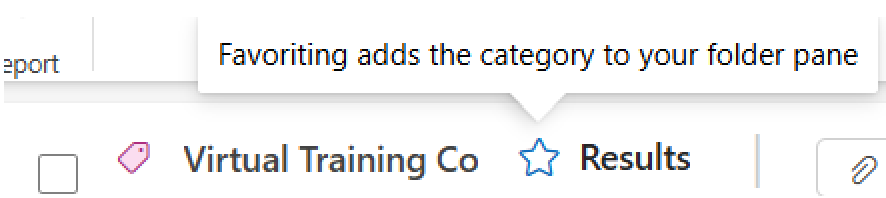
You might be familiar with categories, but they've been significantly upgraded. See the category names and colors directly on your messages in your inbox.



To add a Category to the Favorites

Want to see everything you've tagged with that category? Just click it right on your message. You can even add a category to your **Favorites**.

1. When an email has a category, click the category icon.
2. Click the Star icon for Results.



Create or Edit an Email Signature

1. Go to **Settings** > **Accounts** > **Signatures**.

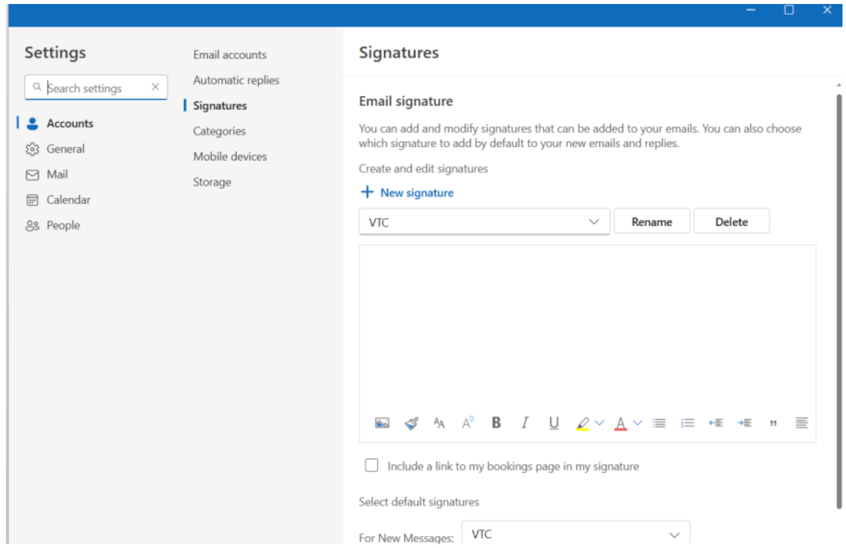
2. Under **Email signature**, select **New Signature.**

Note: Or select the name of the signature from the dropdown menu if you want to edit it.

3. Add and edit any text you want for your signature. You can also add images or change formatting.

4. Select **Save** when you're done.

Under the email signature editing box, you can choose which signature or (No signature) you want to show up automatically for **New messages** or **Replies/Forwards**.



Send Automatic Out of Office Replies

Use automatic replies to tell people you won't be responding right away to their email messages. This kind of auto-reply "out of office" message is sent only once to each person who sends email to you while you're away.

1. At the top of the page, select **Settings** > **Mail** > **Automatic replies**.
2. Select the **Turn on automatic replies** toggle.
3. Select the **Send replies only during a time period** check box and then enter a start and end time.

If you don't set a time, your automatic reply remains on until you turn it off by selecting the **Automatic replies on** toggle.

1. Select the check box for any of the following options that you're interested in:

   - **Block my calendar for this period**
   - **Automatically decline new invitations for events that occur during this period**
   - **Decline and cancel my meetings during this period**

2. In the box at the bottom of the window, type a message to send to people during the time you're away.

If you like, you can use the formatting options at the top of the box to change the font and color of the text or customize your message in other ways.

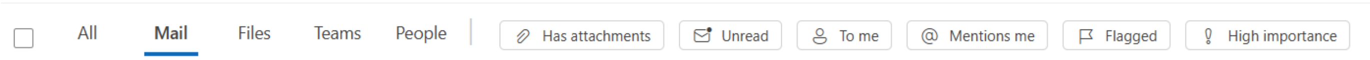
3. If you want senders outside your organization to get automatic replies, select the check box for **Send replies outside your organization**.

4. When you're done, select **Save** at the top of the window.

If you didn't set a time for automatic replies (step 4 earlier), you'll need to turn them off manually. To turn off automatic replies, sign in to Outlook on the web, choose **Settings** > **Mail** > **Automatic replies** and then select the **Automatic replies on** toggle.

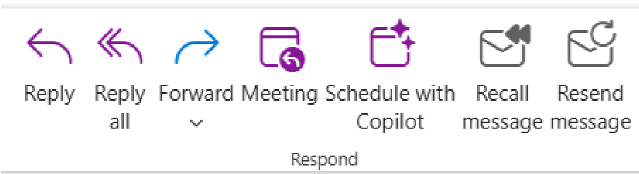
Searching

When searching for something in Mail, you can click at the top in the Search box, type what you are looking for. You will be presented with a menu of additional options.



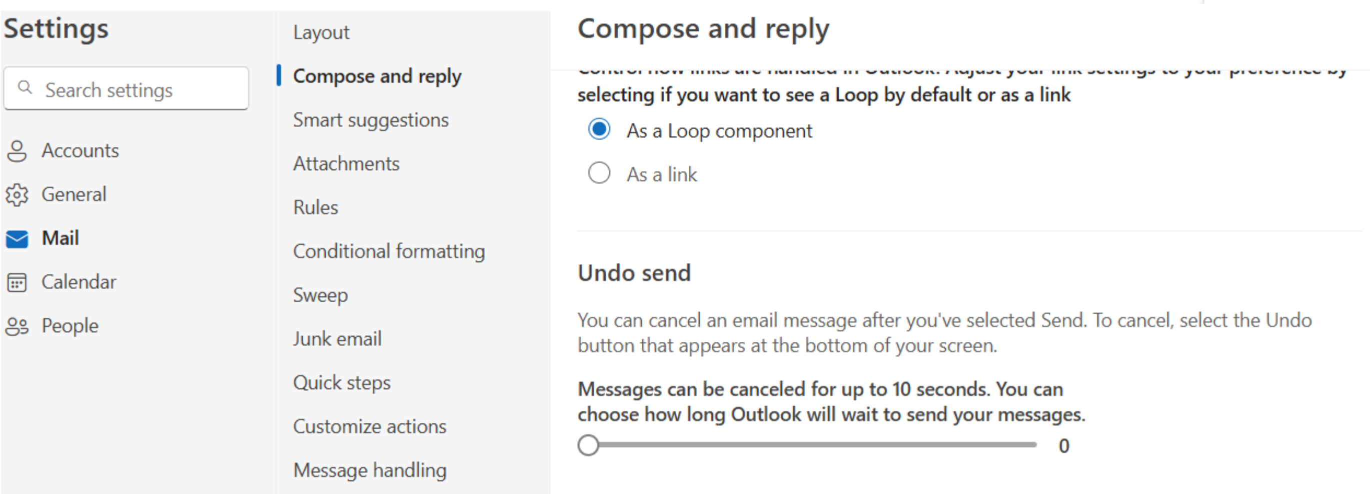
Sent Folder

The Sent folder has its own unique ribbon options like Recall and Resend.



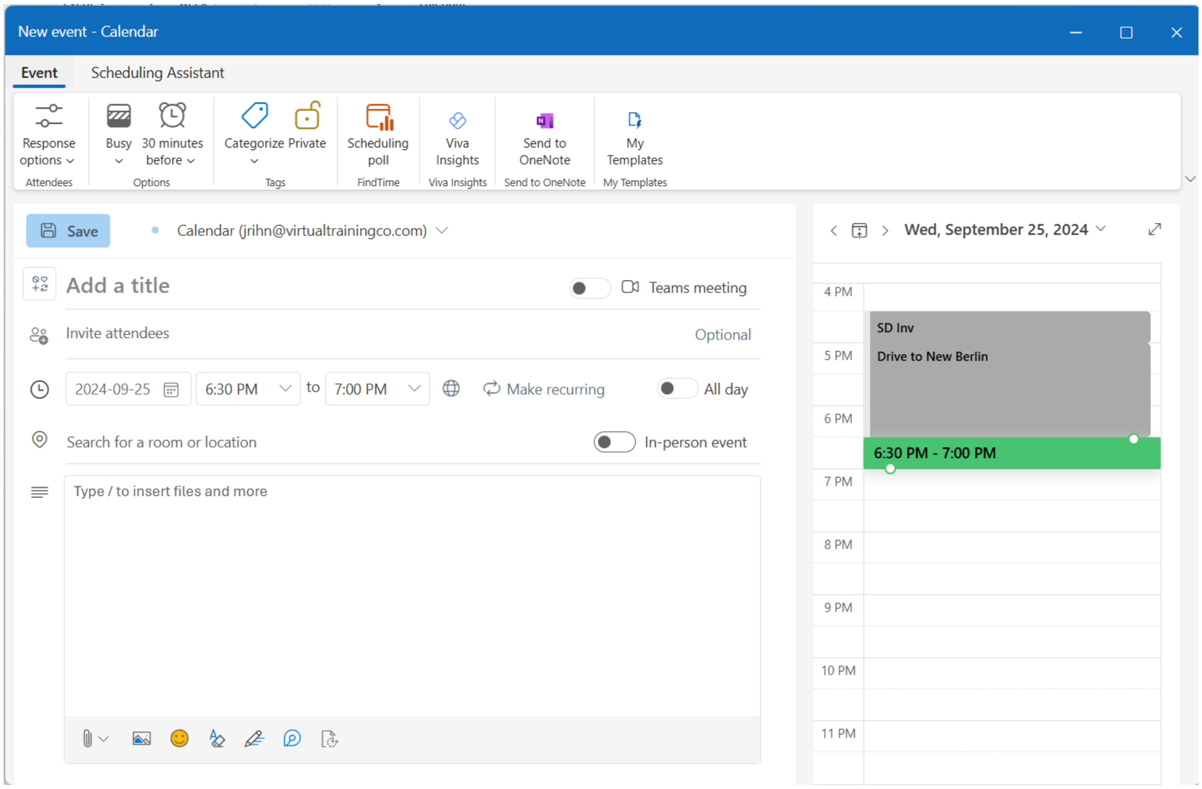
Undo Send

You can enable an "Undo Send" option if you're using new outlook to your email address, up to a maximum of **10 seconds** after selecting the "Send" button. After this option is enabled, you can use it to recall a message after it's sent.



Calendar

In the Outlook Calendar, creating a new meeting has had an upgrade.



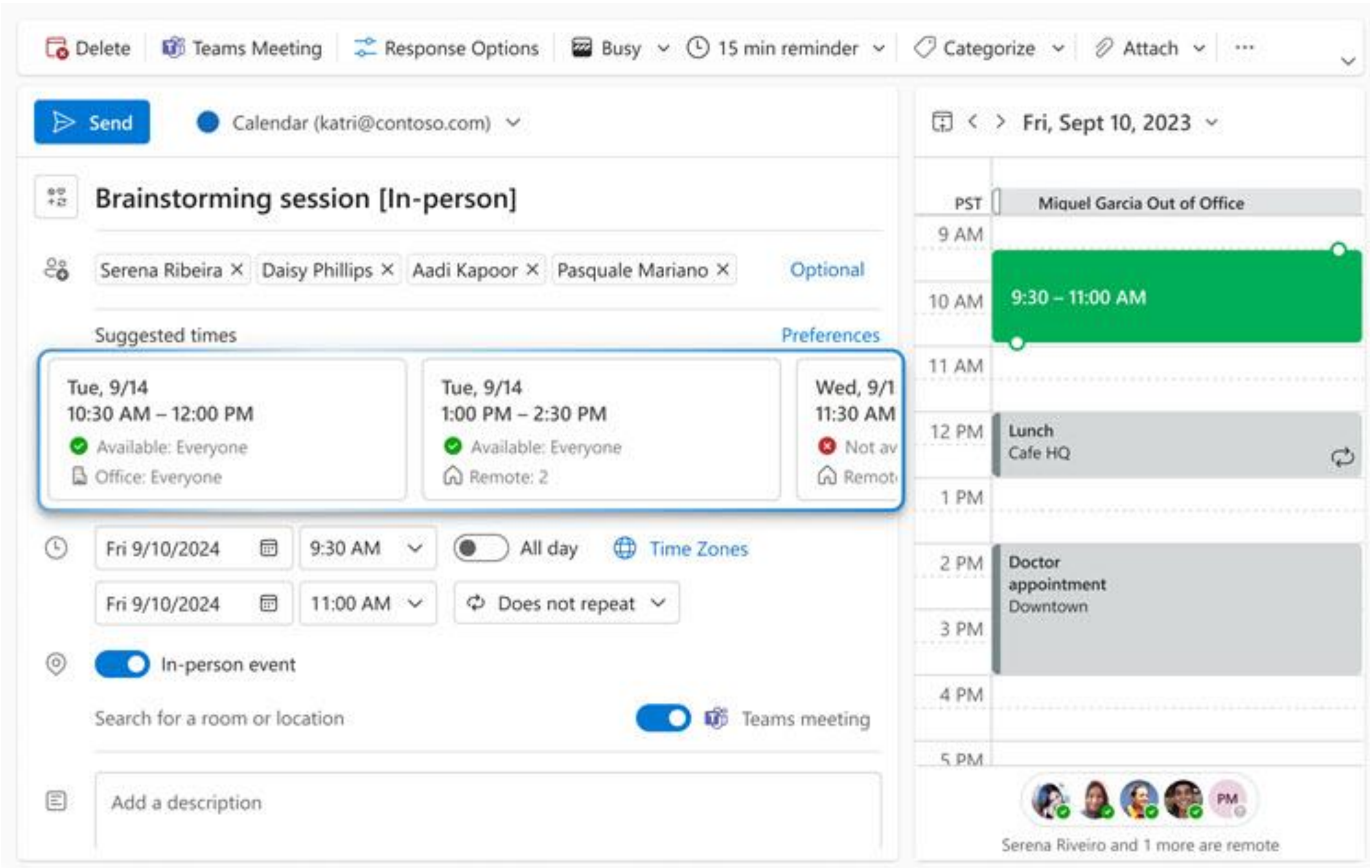
1. Click to the date and time to add a new event. You will find a simplified popup window.
2. Click More options to make other changes.
3. Choose to make the meeting a Teams meeting or an in-person meeting.
4. Click Save when done.

In-person Event

Outlook can help you with scheduling in-person events. Organizers can request invitees to attend the meeting in-person, and attendees can respond confirming if they will be able to participate in person or if they can only attend virtually.

Time suggestions for in-person event

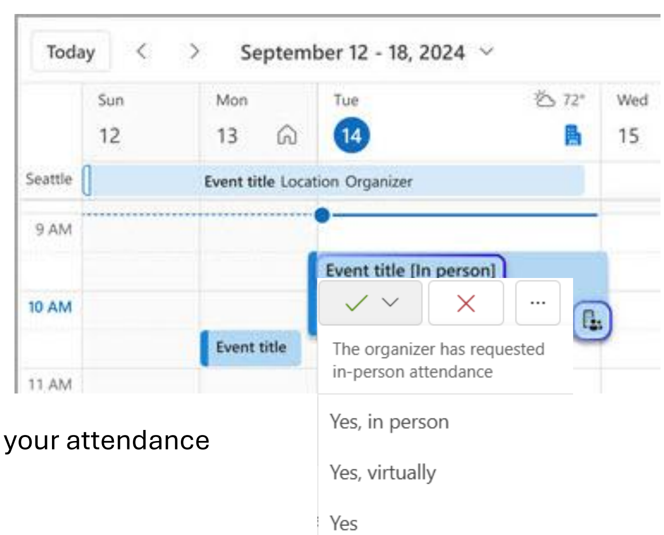
When you mark an event as in-person, the suggested times for the event might change now not only on the attendees' time availability, but now also on their location availability. Time slots in which attendees are planning to be in the office will be suggested first.



Identifying an in-person event

If you receive a meeting invite that is marked as in-person, you will see visual cues on both the email invite and the calendar event to help inform that the meeting organizer has requested attendees to participate in person.

The email invite and the calendar event will both have an [in-person] suffix appended to the title. The mail invite will also include an "in-person" label in its contents.



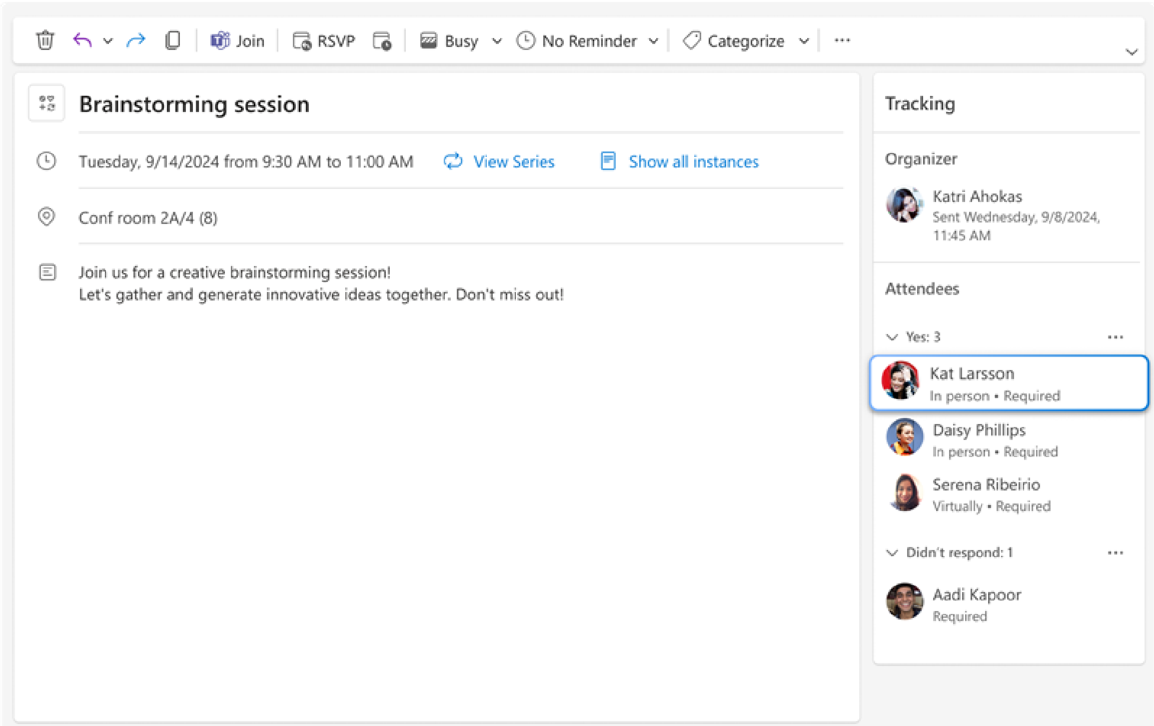
Additionally, the calendar event will also contain a unique icon to help identify in-person events.

Responding to an in-person event

When responding to an in-person request, instead of just one "Yes" option, you will now see three. Choose "Yes, in-person" if you plan to attend the meeting in-person as requested by the organizer. Choose "Yes, virtually" if you would like to attend, but cannot make it in-person. Or select "Yes" - with no attendance mode information - in case you prefer to confirm participation, but not disclosing your attendance mode.

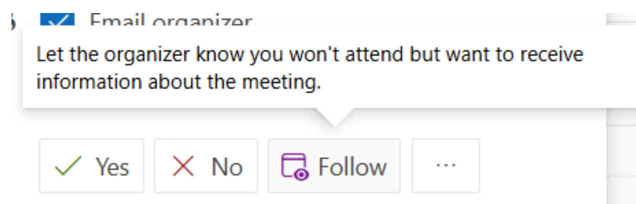
Tracking in-person responses

As attendees respond to an in-person request, you can track their responses in the tracking pane, which displays each person's attendance mode along with their response.



Follow Your Meetings

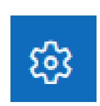
Follow is a new meeting response (RSVP) option that goes beyond the traditional Accept, Tentative, and Decline choices. It is geared towards individuals with high meeting loads and conflicting meetings each day. **Follow** is the ideal RSVP option for meetings you can't attend but still want to stay engaged and receive information about. Other attendees will be able to see if you are following a meeting.

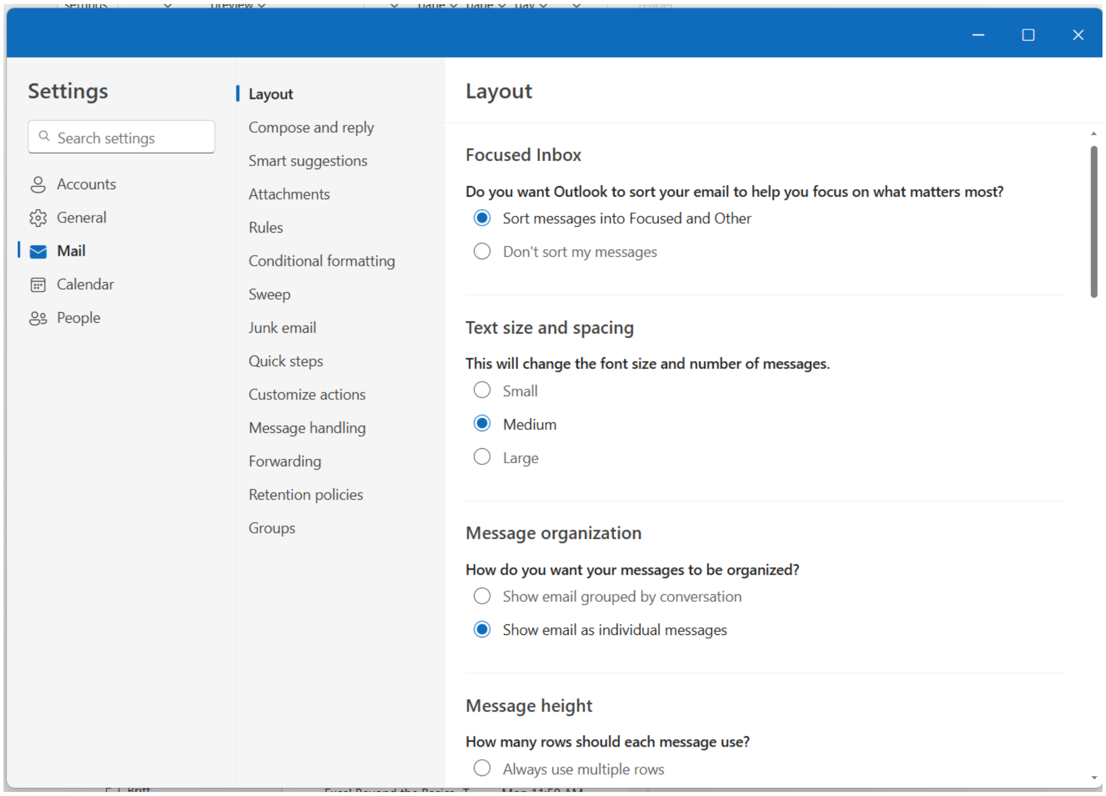


Outlook Settings

From the View tab of the ribbon, you can open the settings. On the left side of the window, you will find the categories and subcategories in the middle. This is where you will be able to manage your Account(s), set up your working days/times and more.

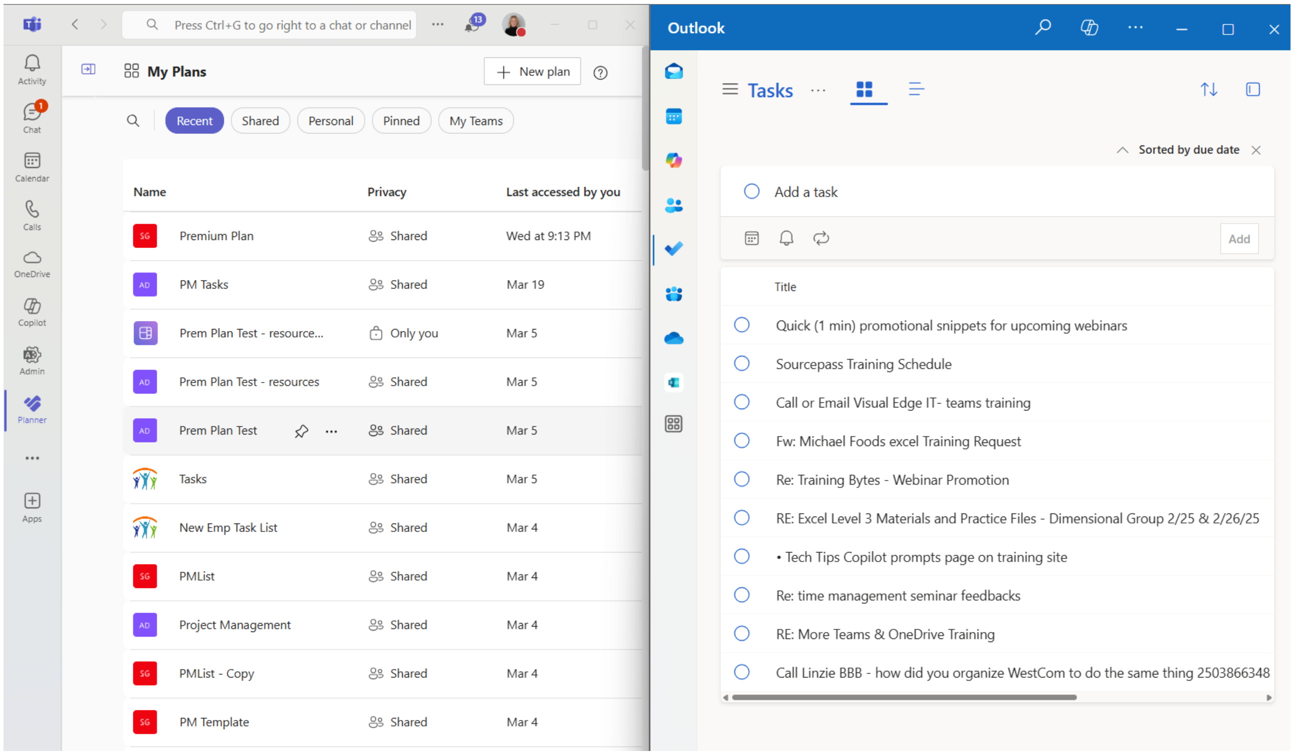
Open the settings from the top right of the window, click the icon.




Settings
Search settings
Accounts
General
Mail
Calendar
People
Layout
Compose and reply
Smart suggestions
Attachments
Rules
Conditional formatting
Sweep
Junk email
Quick steps
Customize actions
Message handling
Forwarding
Retention policies
Groups
Layout
Focused Inbox
Do you want Outlook to sort your email to help you focus on what matters most?
Sort messages into Focused and Other
Don't sort my messages
Text size and spacing
This will change the font size and number of messages.
Small
Medium
Large
Message organization
How do you want your messages to be organized?
Show email grouped by conversation
Show email as individual messages
Message height
How many rows should each message use?
Always use multiple rows

Using Microsoft 365 Planner and To Do

Microsoft Planner is a tool for personal task management, team project management, and deadline tracking. It uses a visual, project-management approach and integrates with Microsoft Teams. Microsoft To-do, on the other hand, focuses on personal productivity and offers a simplified list-based structure for



managing individual tasks.

Using to-do lists and planners effectively in a finance or accounting department can significantly enhance productivity and ensure that critical tasks are completed on time. Here are some best practices:

1. Prioritize Tasks

- **Categorize Tasks**: Divide tasks into categories such as daily, weekly, and monthly. This helps in managing recurring tasks efficiently.
- **Use Actionable Verbs**: Start tasks with clear, actionable verbs like "review," "reconcile," or "prepare" to make them more specific.

2. Set Clear Deadlines

- **Time Estimates**: Assign realistic time estimates to each task to manage your schedule better.
- **Regular Reviews**: Review your to-do list daily or weekly to ensure tasks are progressing as planned.

3. Leverage Technology

- **Sync with Accounting Software**: Use tools that integrate with your accounting software to automatically update financial data and reduce manual entry.
- **Use Templates**: Utilize to-do list templates to streamline your workflow and ensure consistency.

4. Maintain Accountability

- **Daily Reconciliation**: Reconcile cash and receipts daily to quickly identify discrepancies and maintain financial accuracy.
- **Task Justification**: Justify each task on your list to ensure it is necessary and aligns with your goals.

5. Foster Collaboration

- **Shared Planners**: Use shared planners for team tasks to improve collaboration and transparency.
- **Regular Meetings**: Hold regular meetings to discuss progress and address any issues promptly.

Implementing these practices can help your finance or accounting department stay organized, reduce errors, and improve overall efficiency.

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

Microsoft 365 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.

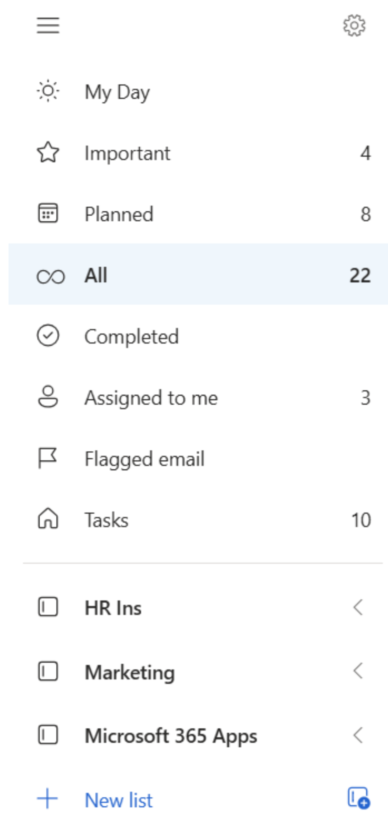
The primary goal of a to-do list is to outline your priorities, helping you remember everything and enabling you to plan your tasks efficiently, so they are completed within the necessary time frame. Keeping an up-to-date to-do list provides peace of mind, as it clearly shows what needs to be done.

Microsoft Planner and To Do are powerful tools designed to enhance productivity and streamline task management. These tools can help public sector employees organize their workloads, collaborate efficiently, and ensure that no task falls through the cracks.

Public sector organizations are using Planner and To Do to streamline processes, communicate with stakeholders, comply with regulations, and achieve outcomes.

Planner and To-Do can be used to:

- Plan and execute policy initiatives and programs
- Coordinate emergency response and disaster recovery efforts
- Track and report budget and expenditure data
- Organize training and development activities
- Collaborate with other agencies and stakeholders



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

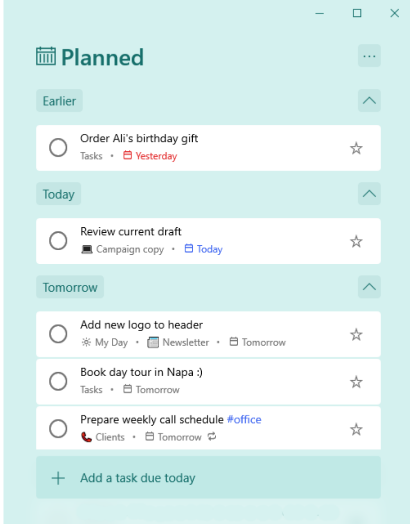
A Task can be added within most areas of the To Do app or within Outlook.

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

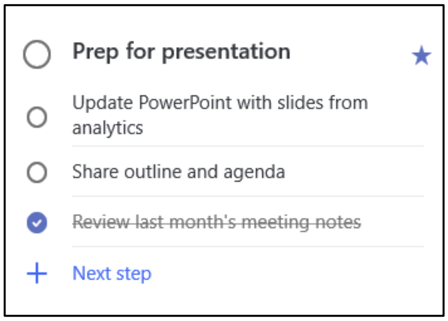
1. Select a task.
2. Select **Repeat** and choose when your task will repeat daily, on weekdays, weekly, monthly, yearly, or a custom repetition.

Add Steps

Use steps to break your larger tasks down into 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.

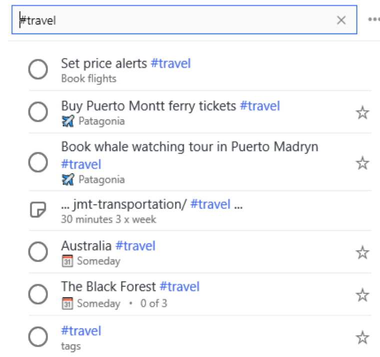
Add Notes

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.

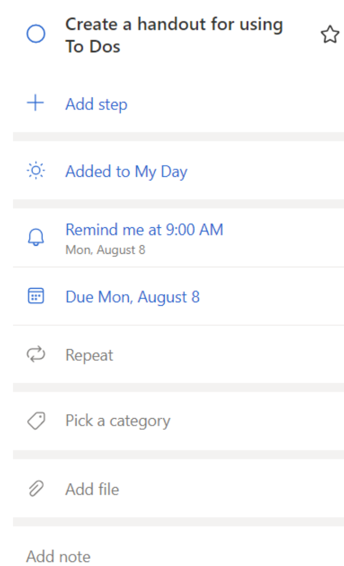
You can quickly see all the tasks, notes, and steps that share a tag by selecting that tag or searching for it in the search bar.



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.

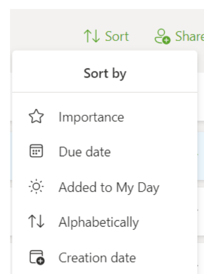
Categories for Tasks from Flagged Email



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.



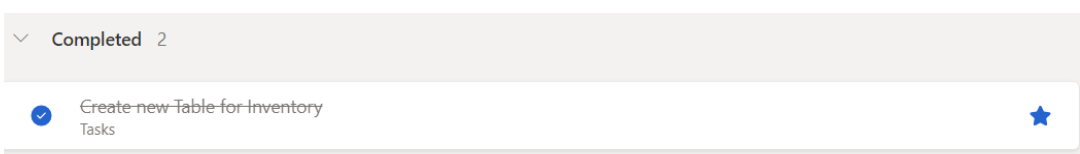
In all the views, look at the top right of the window for the icon. From the menu, you can choose the option that best suits your needs.

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.



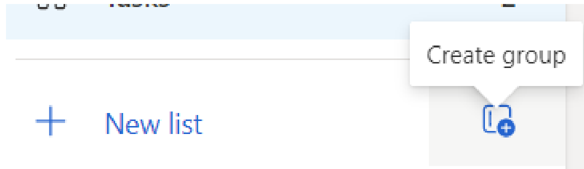
Working with Lists and Groups

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.

Microsoft 365 Planner

Using a planner in a finance or accounting department offers several benefits that can enhance productivity and efficiency. Here are some key advantages:

1. Improved Organization

- **Centralized Task Management**: Planners help keep all tasks, deadlines, and important dates in one place, making it easier to manage and track them.

- **Clear Prioritization**: You can prioritize tasks based on urgency and importance, ensuring that critical tasks are completed first.

2. Enhanced Collaboration

- **Shared Access**: Team members can access and update the planner, promoting transparency and collaboration.

- **Real-Time Updates**: Changes and updates are visible to everyone in real-time, reducing miscommunication and ensuring everyone is on the same page.

3. Better Time Management

- **Scheduled Reminders**: Planners can send reminders for upcoming deadlines and meetings, helping to avoid last-minute rushes.

- **Time Blocking**: Allocate specific time slots for different tasks, which can improve focus and productivity.

4. Increased Accountability

- **Task Assignment**: Assign tasks to specific team members, making it clear who is responsible for what.

- **Progress Tracking**: Monitor the progress of tasks and projects, ensuring that everything is on track and identifying any potential delays early.

5. Streamlined Workflow

- **Recurring Tasks**: Set up recurring tasks for regular activities like monthly reconciliations or quarterly reports, reducing the need to manually enter them each time.

- **Integration with Other Tools**: Many planners can integrate with other tools and software, such as accounting systems, to streamline workflows and reduce manual data entry.

6. Enhanced Reporting and Analysis

- **Data Insights**: Use the planner to track task completion rates, identify bottlenecks, and analyze team performance.

- **Historical Data**: Maintain a record of past tasks and projects, which can be useful for future planning and audits.

Implementing a planner can lead to a more organized, efficient, and collaborative finance or accounting department.

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:

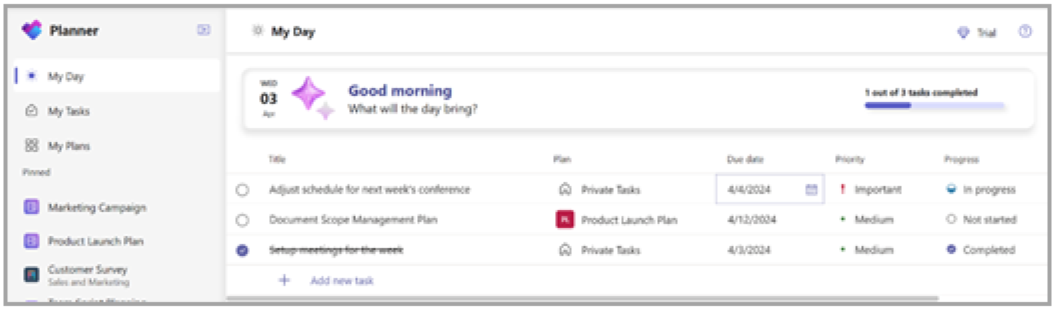
- **Unified Experience:** The new Planner combines the simplicity of Microsoft To Do, the collaboration features of Planner, and the power of Project for the web into a single, unified experience.
- **Streamlined Navigation**: The interface now includes three main sections: My Day, My Tasks, and My Plans, 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.

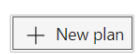
My Tasks

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

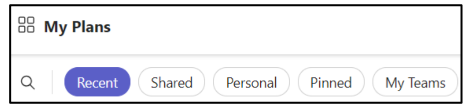
My Plans shows all the user's To Do lists, basic plans, and premium plans.



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

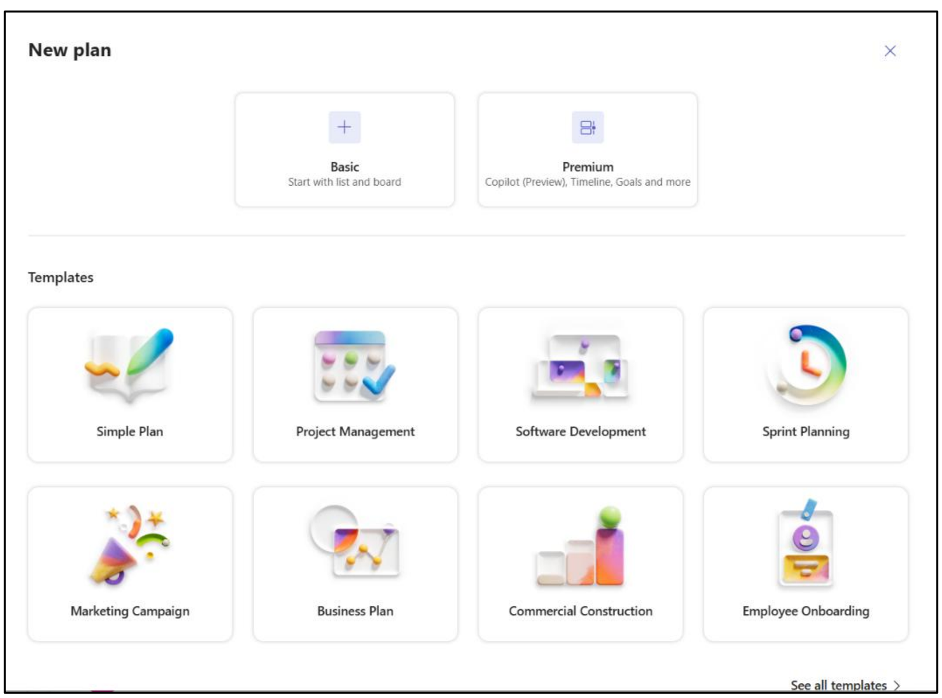
Microsoft Planner offers several views to help you manage and visualize your tasks effectively:

- **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.

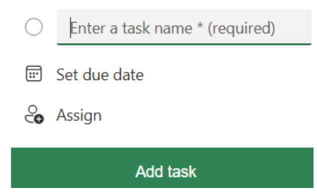
1. Once you click on a template, you will see a more complete view, note the specific template's sections and key benefits.
2. Select Back to view other templates -- or proceed as follows:
3. Add a title for your new plan.
4. Optionally, use the drop-down list to Add to an existing group.
5. Open and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

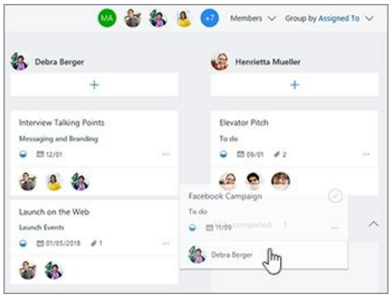
To Add a Bucket

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.

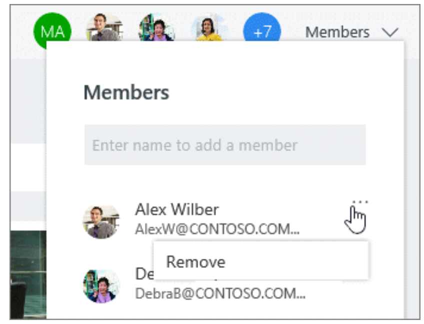
Assign People to Tasks



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.

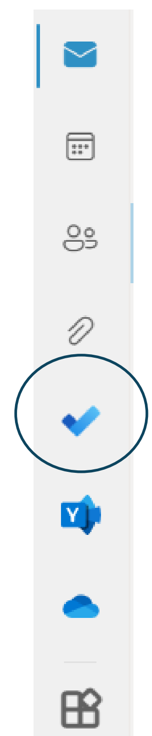
Need to Remove Someone?

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.

Outlook Tasks Integration

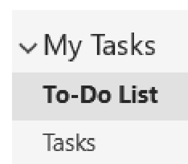
Outlook Online

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.

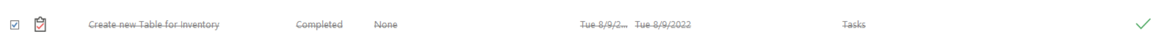
Outlook Desktop



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.



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.

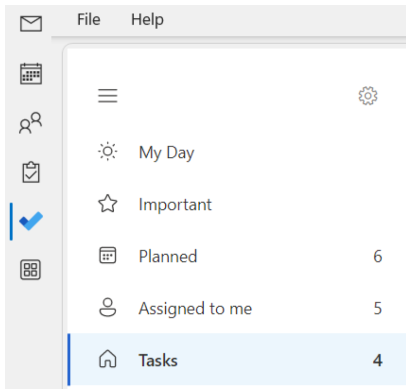
View your plan and tasks in Outlook

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.

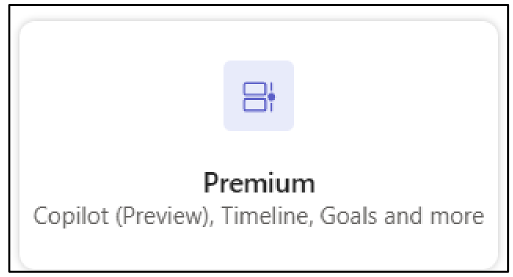
In Planner, you're able to edit this task as usual.



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.

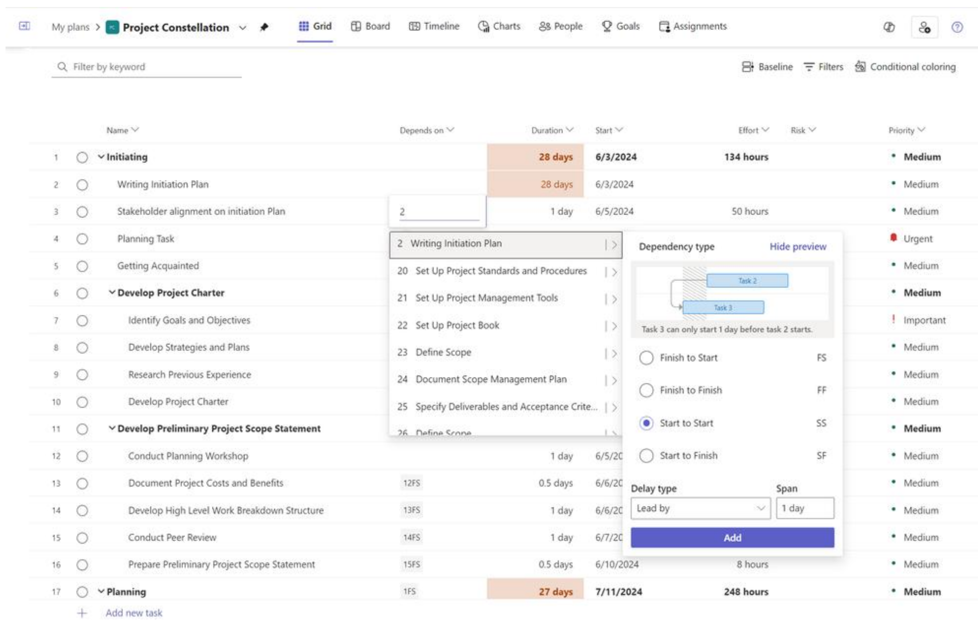
Advanced Task Dependencies

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.