

Sharing, Planning and Collaborating with Planner, To Do and More



CompuWorks
Webinar Series

Microsoft Planner

What is Microsoft Planner? Microsoft Planner (Planner) is a task management tool that small teams of individuals can use to manage their work and associated tasks visually and openly with the rest of the team.

Planner can be used as its own app or you can use it thru other apps like Teams or SharePoint.

Planner App Online

From your Microsoft home page online, click on the Planner icon.



1. Planner opens in what's called the Planner Hub, which shows you the plans you've created yourself or been added to by other people. If you're using Planner with a personal O365 subscription, you'll only ever see plans you've created yourself in the Planner Hub.
2. Initially, the Planner Hub will be blank because you haven't created any plans yet. To create a plan, click **New Plan** in the main menu in the left sidebar.
3. Give your plan a name, choose whether it's Public for other people in your company or Private, and click **Create Plan**.

Add Tasks

1. 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).

A screenshot of the 'Add Task' dialog box in Microsoft Planner. The title is 'PTO Todo'. The main task name is 'Update 2022 Reports'. Below the name, it says 'Last changed moments ago by you'. There are sections for 'Assign' (with a person icon), 'Add label' (with a tag icon), 'Bucket' (set to 'To do'), 'Progress' (set to 'Not started'), and 'Priority' (set to 'Medium'). There are also fields for 'Start date' (set to 'Start anytime') and 'Due date' (set to 'Due anytime'). Below these are sections for 'Notes' (with a text area), 'Checklist' (with an 'Add an item' button), and 'Attachments' (with an 'Add attachment' button). At the bottom, there is a 'Comments' section.

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.

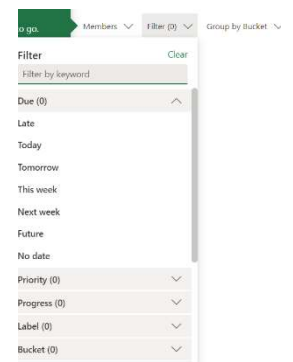
Use Buckets

Having a long list of tasks is fine, but being able to have different lists to manage the tasks would be better. To manage those tasks, Planner has a concept of Buckets. A new plan only has one Bucket called To Do.

You can name a bucket and add existing tasks or new tasks to the bucket. Drag and drop an existing task to a bucket or click New Task under the name of the Bucket.

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.



Microsoft To-Do

What is Microsoft To-Do? The To Do app makes managing tasks easier. Break tasks down into simple steps, add due dates, and set reminders for your daily checklist to keep you on track.

- 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 10, and the web.




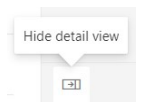
Microsoft Planner vs Microsoft To Do

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.

Using To Do

When you open the online app for Microsoft To Do, you will have a navigation pane on the left organized with easy access to your To Do items like My Day, Planned, Assigned to me, etc.

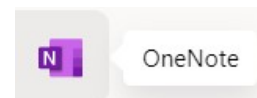
1. To Add a New Task – click the icon Add a task. Type the Name then  Add a task press enter.
2. You can edit the details by clicking on the name, it will open a pane on the right for updating. After updating you can go to the bottom left of the details pane and click on **Hide detail view**.



The Tasks you add in the online version of To Do are available in the desktop or online versions of Outlook. From Outlook desktop go to Tasks then Tasks. From Outlook online, click on the To Do icon at the bottom of the navigation pane.

OneNote

What is OneNote? Microsoft OneNote is a digital notebook that provides a single place where you can gather all of your notes and information, with the added benefits of powerful search capabilities to find what you are looking for quickly, plus easy-to-use shared notebooks so you can manage information overload and work together with others more effectively.



Like a paper notebook, your OneNote notebooks can be organized by multiple sections that let you categorize information by project, subject, location, and similar criteria. Each section holds one or more pages that hold information specific to that notebook section.

Unlike paper notebooks, which have a limited number of sections and pages, your electronic notebooks in OneNote will never run out of space because they can hold as many sections and pages as you need.

A typical OneNote Notebook is made up of one or more Notebook Sections. Within each Section are the individual Pages and Subpages on which you take notes. OneNote isn't limited to any particular organizational style.

OneNote notebooks can be used in the desktop version, online, from a tablet or smartphone.

Using Sections


Whenever you create a new notebook, it automatically creates one new section for you. You can right-click its section tab and click the Rename command to give the first section a meaningful description. You can create additional sections at any time.

Create a New Section

When you create a new Section, a new Page is automatically created as well. To work with Pages, please see the Pages section in this manual.

The new Page will have a place holder for the Title and Date/Time of creation will automatically be entered.

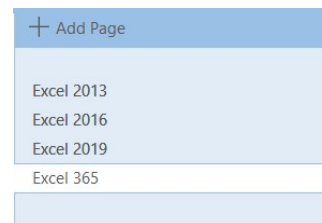
To create a new section, do the following:

1. Click on the  icon in the Section Menu or Right-click any existing section tab in your notebook, and then click New Section or click the New Section icon at the end of the Section Tabs.
2. Type a meaningful description for the new section, and then press ENTER.

Pages

The pages in each section of a OneNote notebook are where you take notes. Pages are represented by page tabs along the right side of the document window. Each page is made up of a page header and the main note-taking area of the page.

Pages can contain subpages. Subpages are additional pages with smaller tabs than the primary pages. By adding several subpages to a page, you can create groups of pages, enabling you to further organize your notes.



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Whenever you create a new section in your notebook, it automatically contains a single blank page. You can type a title for this page and begin to take notes on it. You can keep writing on the page for as long as you need (unlike on paper, you won't run out of space), or you can create additional pages at any time.

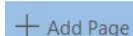
Create New Pages

You can drag pages around in the list to organize them how you want them displayed. You can group a note with another by dragging it to the right under the other page. Then you can collapse groups of pages to keep them organized and tidy.

The new Page will have a place holder for the Title and Date/Time of creation will automatically be entered.

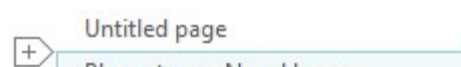
To create a new page, do the following:

1. On the right side of the OneNote program window, click the Add Page button.
2. Type a page title into the dotted heading area at the top of the page, and then press ENTER.



You can organize pages by dragging their tabs up or down in the page tabs column until they are shown in the order in which you want them to appear.

NOTE: You can create a new Page in the page list in the Page Pane. Hesitate in the Page Pane inbetween pages and you will see a plus sign, click there to insert a new page.



Taking Notes

You can enter text, pictures, and more anywhere on a page. Everything you enter is enclosed in a container you can move around the page, which makes it easy to organize your notes.

To Add Text on a Page

1. Click within the Page to display a text box (Container).
2. Type text as normal.

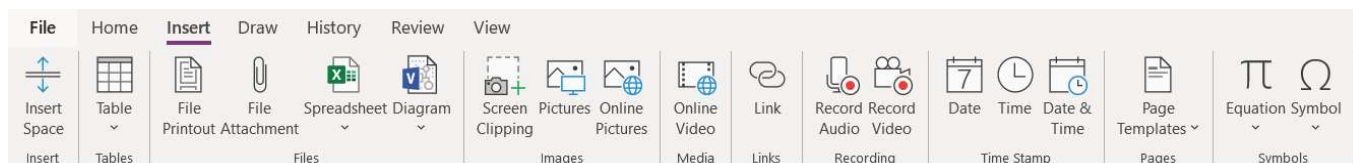
Using Containers

Note containers are flexible bounding boxes that contain the notes that you type or paste on a page. The note containers appear on a page whenever you move the pointer over them or when you click on a page and begin typing.

Note containers can hold text, pictures, audio and video clips, handwriting, and screen clippings. You can change their size and dimensions, move them around on a page, and merge their contents.

Insert Objects

You can use the Inert Tab from the Ribbon to add things like; Tables, Images, Symbols, etc. You can also add things like Emails, Appointments, etc. from programs like Outlook



OneNote in Teams

A OneNote notebook can be added to Microsoft Teams in a Channel as a Tab. You can access the Notebook from the online version of OneNote or directly in the Team Channel.

OneNote vs Wiki

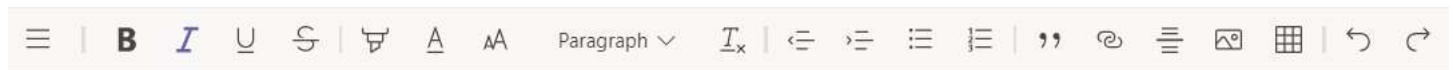
OneNote has Sections, and for each Section, you can create multiple Pages, and Wiki has Pages where you can add Sections to. Unlike OneNote, it does not have any other features, think of it as a very lite version of OneNote where you can only capture text notes in Page/Section layout.

Wiki

What is Wiki? Every channel comes with a Wiki tab. The Wiki tab is a smart-text editor that doubles as a communication machine where you draft, edit, and chat all in one place.

To add a whole new Wiki tab, select Add a tab next to the other tab names in the channel. Select Wiki from the tab gallery. Name the tab and start writing.

A Wiki tab comes with all the usual formatting options, such as bold, italic, and underlined text, highlighting, headers, and lists.



Every document in your Wiki tab is called a **page** and every page is made of different **sections**. To get started, give your page a title and then start authoring sections. Any time you want to add a new section, just hover over the left side of the page and select Add a new section here.

On the left side of your screen, you'll see a table of contents. This helps you navigate quickly between pages or even do some organizing.

Teams Meetings

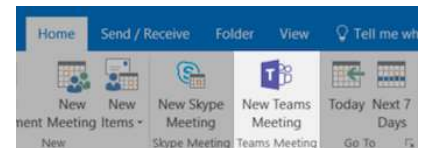
Scheduling a Meeting in Outlook vs Teams

Microsoft Teams includes the Outlook add-in, which lets you create new Teams meetings directly from Outlook. It also lets people view, accept, or join meetings in either app.

Note: Currently, you can schedule Teams meetings from Outlook, but not choose a channel to have them in.

To schedule a meeting in Outlook:

1. Open Outlook and switch to the calendar view.
2. Click New Teams Meeting at the top of the view.
3. Add your invitees to the To field—you can even invite entire contact groups (formerly known as distribution lists). Add your meeting subject, location, start time, and end time.
4. Click Send.



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You can also invite people from outside your organization from Outlook. Just be sure to add them as guests before the meeting starts or they will have to join anonymously.

Share Meeting Notes with Wiki

When you are in a Teams meeting, you can start taking Meeting Notes.

1. From the More Options menu, click on Meeting Notes. This will create a Wiki tab.
2. The tab will be located either in the Channel that the meeting was connected to or within the meeting from the Chat.
3. When you are done with the meeting you can access the Wiki to view the notes taken during the meeting.

Accessing the Wiki Meeting Notes

- From a regular meeting, you can open the Wiki by going to the calendar and opening the meeting then click on the Meeting Notes tab at the top. You can also go to the Chat in Teams to access the Meeting details.
- From a Meeting in a Channel, you can open the Meeting Notes tab directly in the Team/Channel. Each meeting done within that Channel will have its own page in the Wiki based on the name of the Meeting.

Meeting Notes

