

Customized Training by 
UseIT at **SFS**

Stay on top of
your tasks with
Microsoft 365



UseIT at
SFS

Four steps to stay on top of your tasks

1 Choose your system

- Benefits of digital task management
- Introduction to task management applications in M365

2 Collect tasks

Live demo:

- Creating individual and shared tasks and task lists.
- Creating tasks from emails and Teams messages

3 Organize & prioritize

- Best practices for individual and shared task management.

4 Plan, adjust, and evaluate

Live demo:

- Booking time for tasks in calendar

Benefits of digital task management with Microsoft 365



You are able to..

- Easily create and manage tasks with all devices
- Plan and adjust your days quickly and effectively
- Keep track of both short- and long-term goals & projects
- Easily prioritize & organize the tasks
- Keep all the necessary information in the same place
- Share and assign tasks with others

Work smarter, not harder!

To Do



- For **individual** task management
- Simple but versatile **list items**
- **Automated and customized** lists



Automated My Day list



Only list view

Planner



- For **team and project** task management
- Task cards **assigned to members**
- Different visual views



Built-in views



Only manual task creation

Task management with M365

Tasks by Planner and To Do

- For **all** task management
- **All-in-one** list view
- Built-in app **in Teams**



Access via Teams



Limited task editing



Outlook

- For **scheduling** tasks
- Classic task view
- To Do available as a built-in app



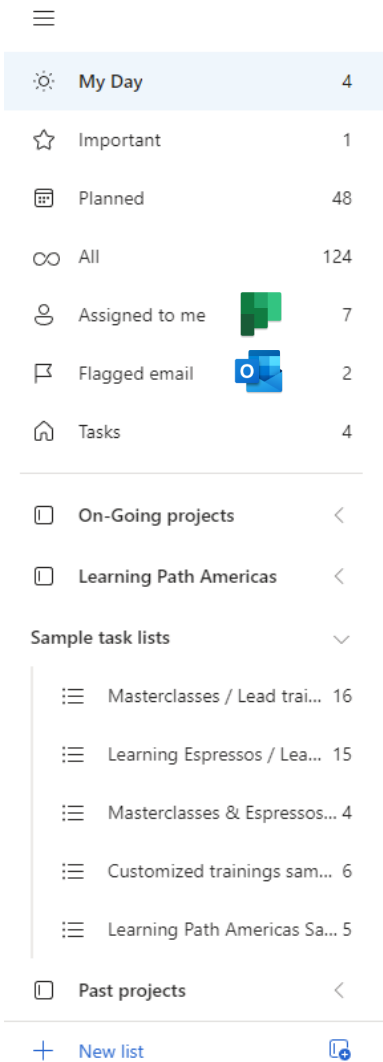
Drag & drop tasks to the calendar



Complicated task editing



Manage individual tasks with the To Do app



Smart lists

My Day: all tasks with a due date for today and other selected tasks

Important: all tasks marked as important

Planned: all tasks with a due date

Assigned to me: all tasks (from Planner, and shared custom lists) assigned to you

Flagged email: Tasks created from emails that are flagged in Outlook

Tasks: individual tasks that aren't in a custom list

Custom lists

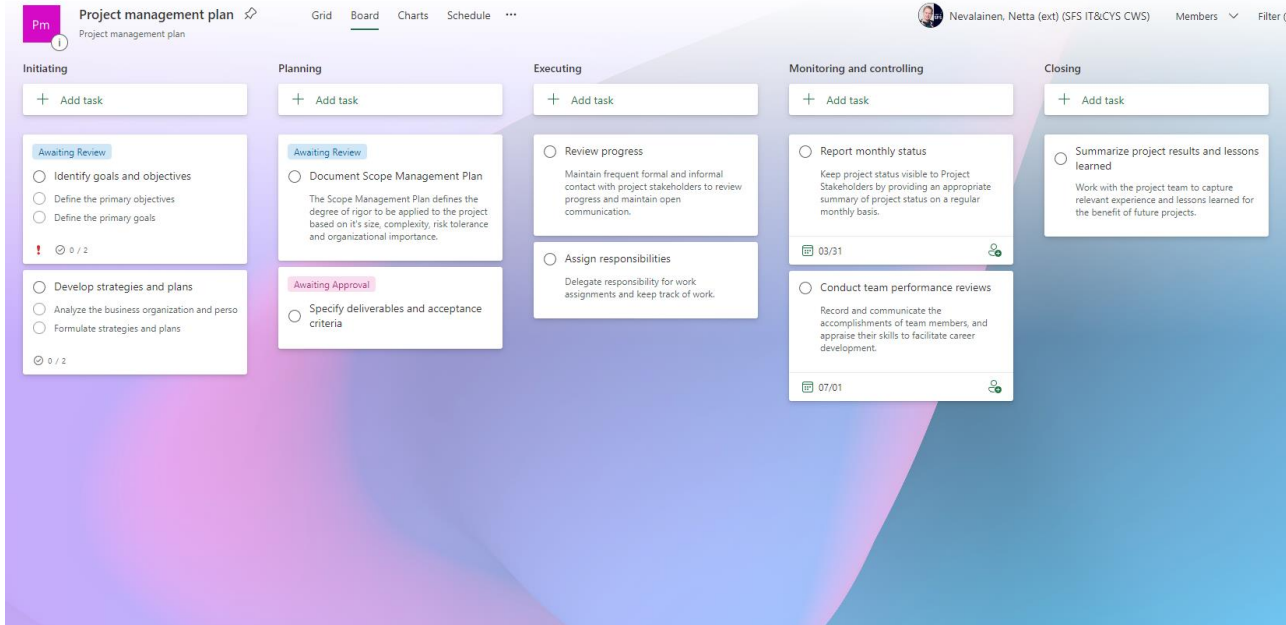
- For individual **projects** and repeating task lists
- Can be **shared, grouped & copied**
- **Tasks can be moved & copied** across lists
- Lists appear in Tasks & To Do

Available via



SIEMENS

Manage shared tasks with Planner

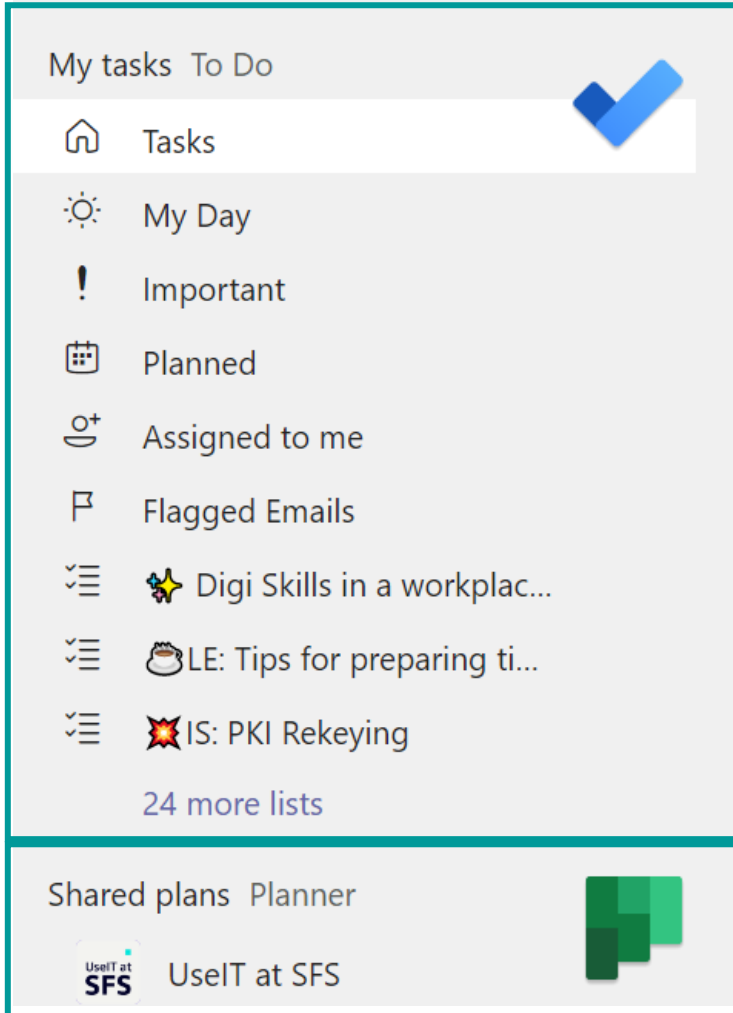


- Tasks as cards in a visual **Kanban board**
- **Can be individual or for an existing group** in SharePoint.
- **Ready-made templates**
- **Personal Assigned to me** board
- Different **views**
- **Grouping and filtering** options

Available via



Manage all tasks with Tasks app in Teams



- **My tasks** include the lists integrated with To Do
 - Tasks
 - My Day (still in development)
 - Important
 - Planned
 - Assigned to me (from Planner)
 - Flagged emails
 - Customized lists (not grouped)
- In tasks, possible **to add / edit**:
 - Name
 - Completion and priority
 - Due date
 - Notes
 - Checklist
- **Shared plans** integrated with Planner
 - Equal task creation
 - Similar views
- Possible to add **new lists or Plans**

Available via



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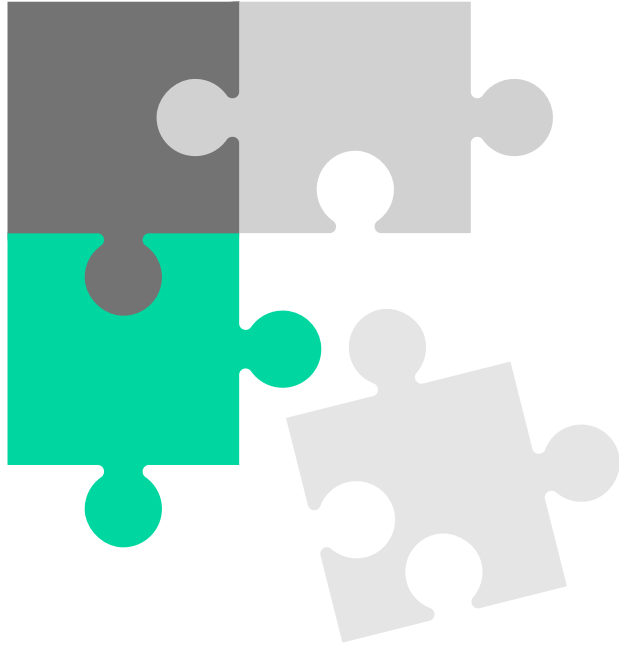
Live Demo

Best practices for individual task management



- Always select a **due date for a task**
- Create a **system** to manage the tasks:
 - Customized lists & groups (only To Do & Tasks apps)
 - Labeling & tags
 - Sorting & filtering
 - Importance & urgency
- Use **subtasks/checklists, notes, and attachments**
- Make use of **reminders and notifications**
- Create **task list templates** for recurring projects
- Utilize **automatic suggestions for My Day (only To Do)**

Best practices for shared task management



- **Define what “completed” looks like**
- Always select a **due date and prioritize** accordingly
- **Assign each task** to a person. If there are multiple people involved, name a lead.
- Categorize the tasks with **buckets and labels**
- Use **notes and attachments for links**
- Use a **checklist** to clarify sub-tasks
- Create **task templates** for regular and repeating tasks
- Use **comments for questions and additional notes**
- Track progress with **chart view** and regular status checks.

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Live Demo

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Q&A

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Questions?

Click [here](#) to book a 1.1 Guidance call

Jigsaw puzzle: four and eight pieces

