



# Work Prioritization Panel Discussion

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# Panelist Introductions



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# Rocks, Pebbles, Sand

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<https://www.youtube.com/watch?v=v5ZvL4as2y0>

# FranklinCovey's Time Matrix

From *Manage Your Time Like a Pro: 7 Tips for Doing What Matters Most*

<https://www.franklincovey.co.uk/toolkits/7-tips-for-doing-what-matters-most/>



# 7 Habits of Highly Effective People

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BE PROACTIVE

BEGIN WITH THE  
END IN MIND

PUT FIRST  
THINGS FIRST

THINK WIN-WIN

SEEK FIRST TO  
UNDERSTAND,  
THEN TO BE  
UNDERSTOOD

SYNERGIZE

SHARPEN THE  
SAW

# Ultimate Task Management

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## Microsoft Tasks By Planner

- Manage your To Do's
- Assign Tasks to Others
- Include Notes, lists, comments & files
- Attach Deadlines
- Get Reminders
- Track Tasks easily
- Integrate with To Do and Outlook calendar
- Integral part of a Team

**YouTube Tutorial:**

<https://www.youtube.com/watch?v=ZtsK0A6KnL0>

# Use the Tasks App in Teams

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<https://support.microsoft.com/en-us/office/use-the-tasks-app-in-teams-e32639f3-2e07-4b62-9a8c-fd706c12c070>

# Shared Plans – Team Channel Tab

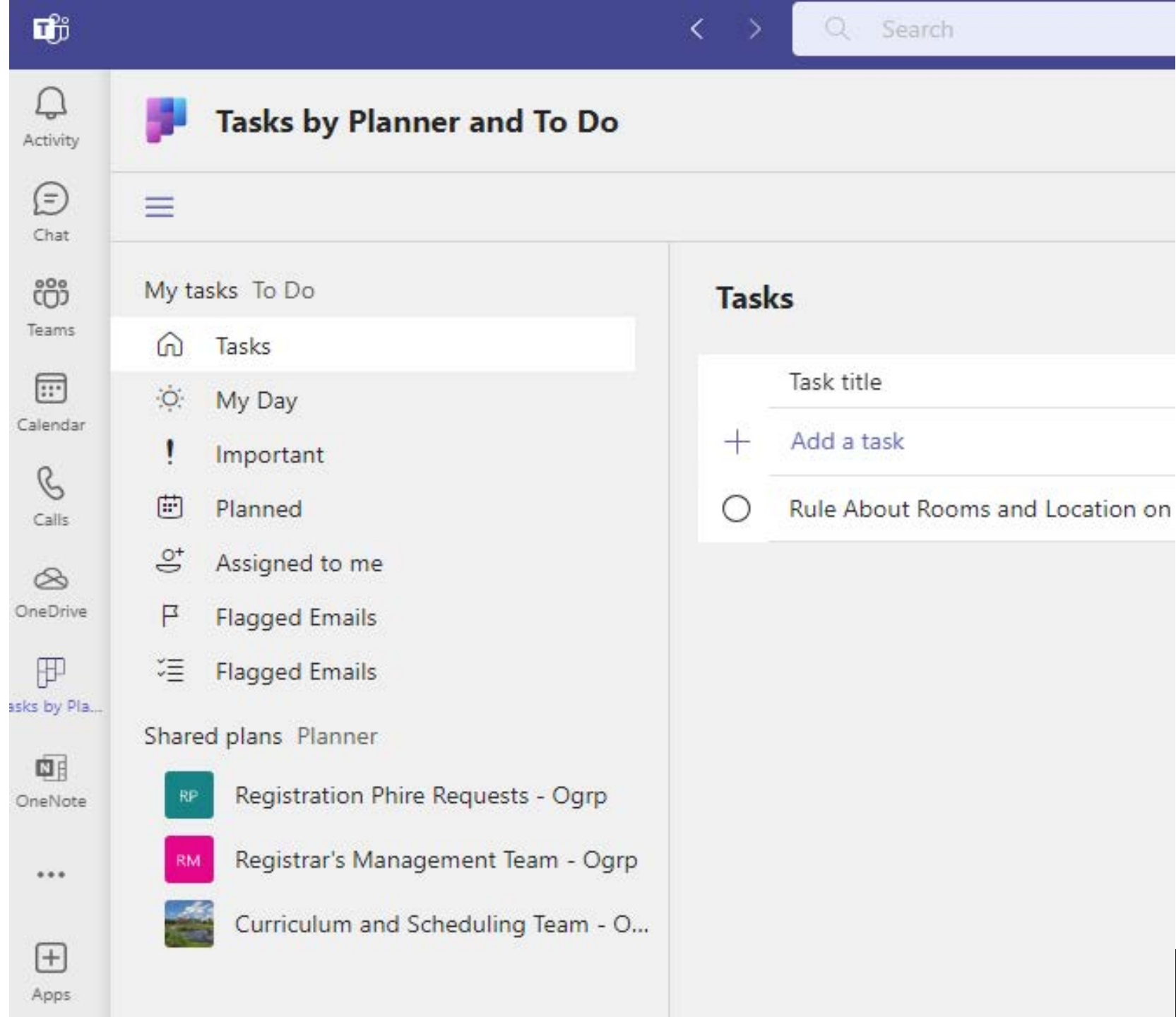
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The screenshot displays the Microsoft Teams interface. At the top, there is a dark blue header with the Teams logo on the left, navigation arrows, and a search bar containing the text "Search". Below the header, the left sidebar shows navigation options: Activity, Chat, Teams, and Calendar. The main content area is divided into two parts. The top part shows the "General" channel header with a landscape image, followed by tabs for "Posts", "Files", "Reflect", "Staff Notebook", and "Tasks" (which is selected). Below the tabs, a purple banner contains a task icon, a right-pointing arrow, and the text "A new Planner experience is coming soon to Teams. Learn more". The bottom part of the main content area shows a task list with a header row containing "Task title" and "Assigned to". Below the header, there is a single row with a plus sign icon and the text "Add a task".



# Shared Plans

The Shared plans section of Tasks shows you plans that have been added to channels in Teams. You choose from a list of teams and channels and find the plan you're looking for. You can then work with the plan as usual in Board, Chart, or Schedule view, or in the List view unique to the Tasks app.



All Active ▾

Filter ▾

List

Board

Charts

Schedule

	Task title		Assigned to	Priority	Due	Bucket ↓
+	Add a task					
<input type="radio"/>	Negotiate pricing ...		Elva Hebert	↓	7/8	Pre-Process
<input type="radio"/>	Record supplier n...		Elva Hebert	!	7/11	Pre-Process
<input type="radio"/>	Evaluate supplie...		Greta Gilliam	↓	7/18	Pre-Process
<input type="radio"/>	Review suppliers s...		Brittney Beach		7/30	Pre-Process

## List view

A unique feature of the Tasks app how it displays tasks and information associated with them in rows and columns. This is called List view, and allows you to change many tasks at once, or filter your tasks.


**Tasks**


View: Active ▾

Filter ▾





















List

Boards

Charts

Schedule



Task title	Assigned to	Priority	Due	Bucket ↓	
<input type="checkbox"/> Add a task <input type="checkbox"/> Submit permit drawings for approval <input type="checkbox"/> Purchase furniture and fixtures <input type="checkbox"/> Find customer goods suppliers <input type="checkbox"/> Set product pricing	            	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 0/2  <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 2/6 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 2/4  <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 0/3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1/4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3 <input type="checkbox"/>	             	 6/2 8/5 7/20 8/15 5/15 7/10 8/3 5/10 6/25 7/5 6/2 7/25 8/1 8/1 8/15	 Store Design Store Design Coffee Product Line & Cust... Coffee Product Line & Cust... Operations & Equipment Operations & Equipment Operations & Equipment Recruitment & Training Recruitment & Training Recruitment & Training Marketing Marketing Marketing Marketing

# Useful Features

➤ Assign Tasks

➤ Track Priority

➤ Stay on Track with Due Dates

➤ Filter Tasks by Status, Priority, Assigned To, etc.

➤ View Tasks in multiple formats: List, Board, Charts, Schedule

Hidden teams

# Adding a Task


When adding a task, you first input the basic information (title, assigned to, priority, due, bucket).


From there, you can click on the task to add more information, such as:


- Start Date
- Progress
- Notes
- Checklists
- Attachments
- Comments


Tasks


○ Test  
Last changed 3 minutes ago by you


 **FD** Faucett, Danielle


 Add label

Bucket: To do  

Progress:  Not started  

Priority:  Medium  

Start date: Start anytime  

Due date: 02/15/2024  

Notes  Show on card

This is a test item to show others how easy it is to create a task. 😊

Checklist 0 / 2  Show on card

- Testing One
- Testing Two
- Add an item

Attachments

Comments

Type your message here

You've been assigned a task



Miller, Megan J.  
To: Faucett, Danielle

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

The screenshot shows a notification card with a green 'Tasks' icon. It states 'Megan assigned a task to you' with a checkmark icon. Below this, a task card is shown for 'Review Scheduling Website' with a calendar icon and the date '2/16/2024'. A green button labeled 'Go to task' is positioned below the task card. At the bottom of the notification, there is a footer with the text: 'You are receiving this email because you have subscribed to Microsoft Office 365. Notification settings: Go to [Banner], select the Gear icon, then select Notifications. Privacy Statement. Microsoft Corporation, One Microsoft Way, Redmond, WA 98052 USA. Microsoft logo'.

# Get notifications about Planner tasks

The Tasks app provides notifications for Planner tasks which will show up 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

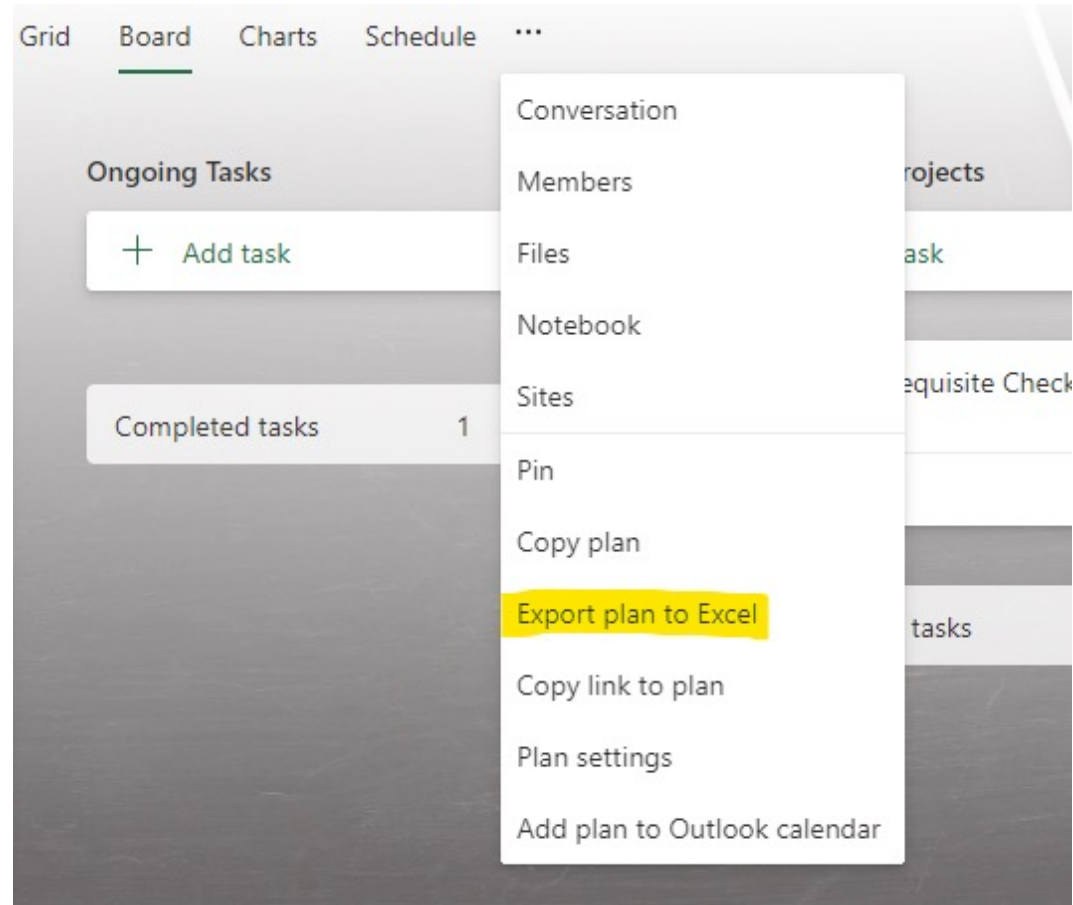
<https://support.microsoft.com/en-us/office/manage-planner-notifications-f6a32f83-058d-4f39-988d-8a2e932820ec>

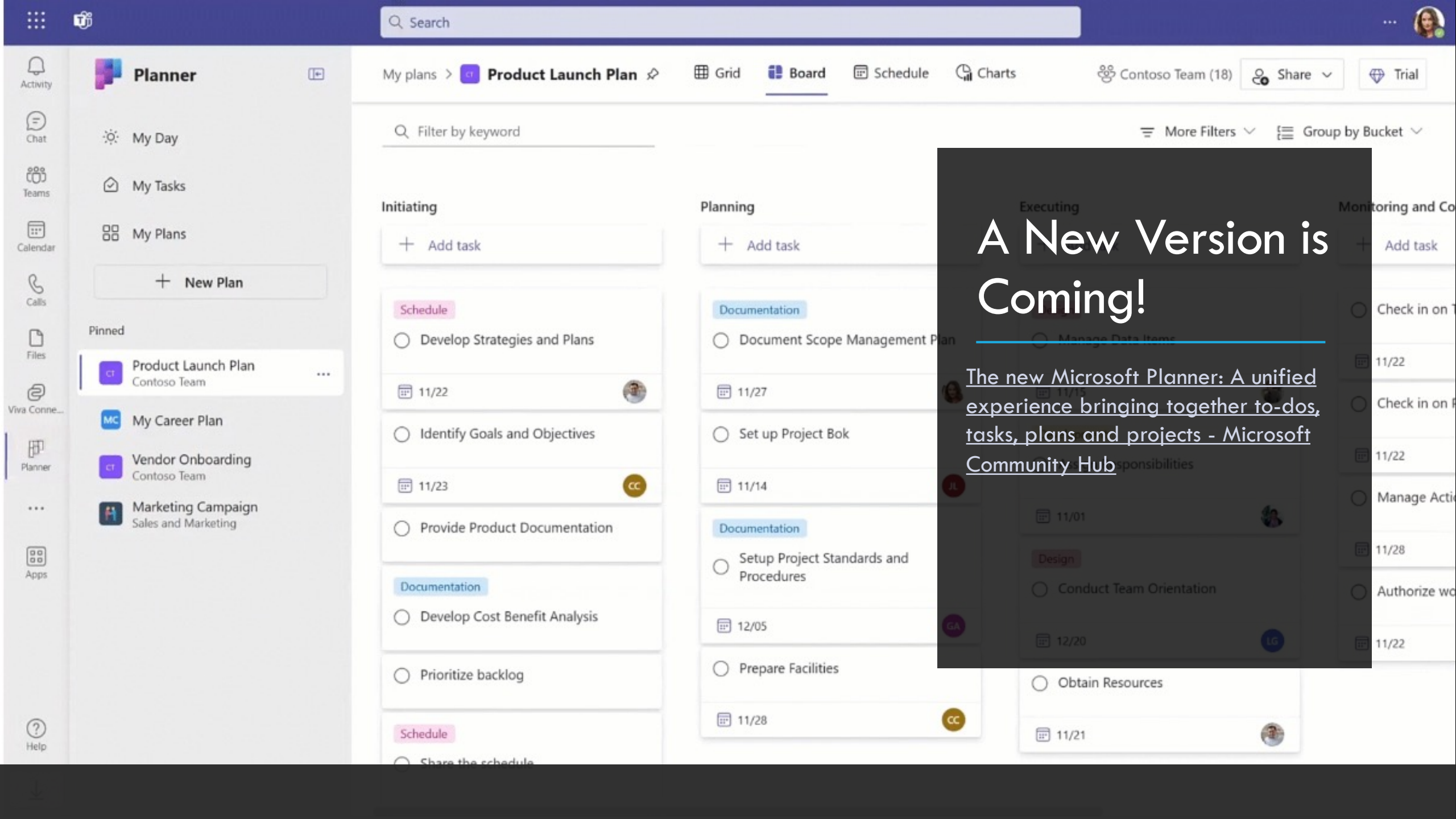


Miller, Megan J. assigned you a task 2:54 PM  
Review Scheduling Website  
Curriculum and Scheduling... > General

# Exporting to Excel – Web App

1. Go to <https://tasks.office.com/mail.missouri.edu/en-US/Home/Planner/>
2. Select the plan you want.
3. Once on the plan, select the three dots (see screenshot) and export to Excel.





**A New Version is Coming!**

[The new Microsoft Planner: A unified experience bringing together to-dos, tasks, plans and projects - Microsoft Community Hub](#)