



MICROSOFT 365[®]

Setup Guide

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APPLYING GTD TO THE MICROSOFT 365 ENVIRONMENT

AN OVERVIEW OF THE MICROSOFT 365 APPLICATIONS

Here is an overview of the applications most relevant in the Microsoft 365 environment for your personal and team workflow. You'll learn about the purpose of the application, the essential functions, and how it relates in the context of GTD.

WORKFLOW MANAGEMENT



MICROSOFT OUTLOOK

Microsoft Outlook is a long-standing application in the Microsoft suite for calendar, email, contact, and task management.

ESSENTIAL FUNCTIONS

- Create, send, receive, filter, read, and file emails
- Calendar management
- Task management, including recurring tasks, due dates, reminders, and file attachments

HOW IT RELATES IN THE CONTEXT OF GTD

- Ability to manage GTD lists
- Enables quick processing and organization of emails into tasks
- Provides an interface between Outlook Tasks and Microsoft To Do

You could easily have a dozen people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.



MICROSOFT TO DO

Microsoft To Do is a new application in the Microsoft suite for task management.

PERSONAL WORKFLOW IN MICROSOFT 365

USING THE APPS IN MICROSOFT 365 FOR YOUR PERSONAL WORKFLOW

In this section you will learn how to approach your personal organization within Microsoft 365. The Five Steps of the GTD workflow serve as the guide for our recommendations.

A FEW NOTES TO START

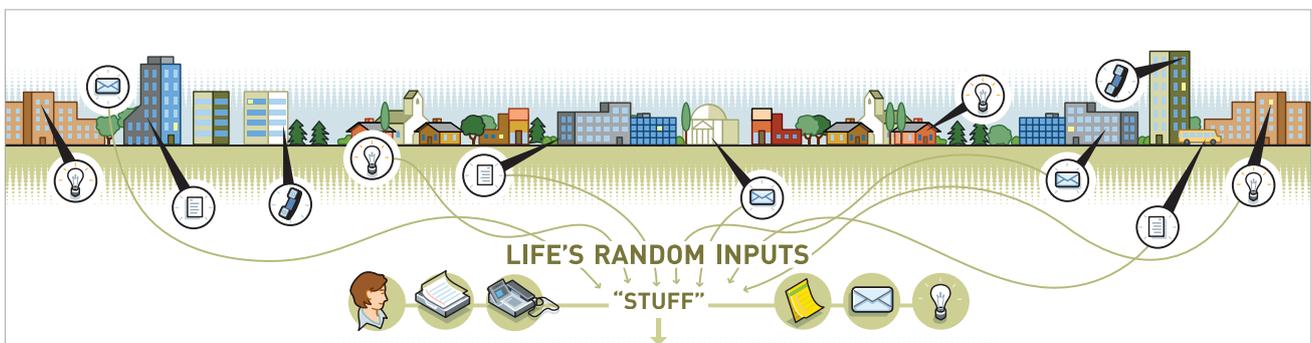
- There are many ways to implement GTD in the Microsoft 365 environment. Which set of tools for you depends both on your personal software preferences and the options available to you.
- The prerequisite for high-functioning team collaboration is that each team member has a trusted system to track their own tasks effectively. Therefore, we start with the personal workflow before going into the team workflow.
- For more specific setup instructions for the Microsoft tools (e.g., Microsoft Outlook, Teams, OneNote), we recommend our GTD Setup Guides for those applications.

STEP 1: CAPTURE

COLLECT WHAT HAS YOUR ATTENTION

Not long ago, email was the primary inbox (capture tool) for most people to receive new digital input that needed to be clarified and organized. Now, with the many apps available to use for collaboration and communication, our potential input has expanded to include new information from messenger apps, project boards, CRMs, and more. We also have analog (hard copy) input we receive through postal mail, meeting notepads, sticky notes, and more.

For stress-free productivity, it is essential to have good strategies and trusted systems for capturing all the input “stuff” that lands in your world, that requires your decision (clarify) and tracking (organize).

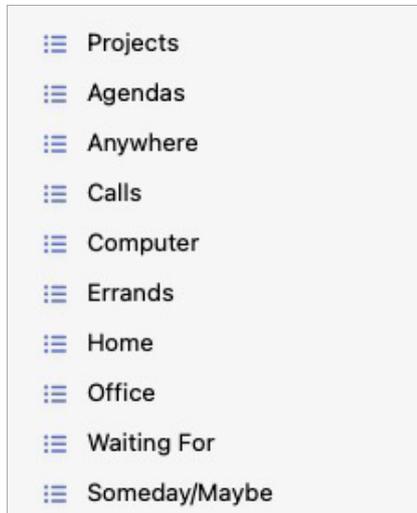


We recommend getting the full Workflow Map, with all of the GTD models, which comes as a PDF download. Visit our online store at store.gettingthingsdone.com to learn more.

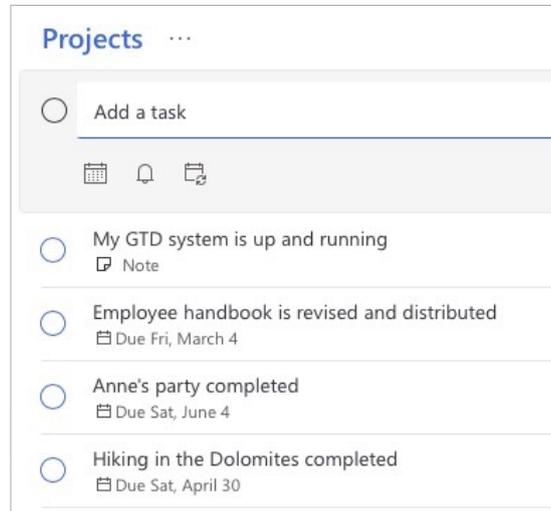
If you use the latest versions of Outlook for Mac on your desktop, your Tasks do not live within the desktop application but are redirected to Microsoft To Do.

We recommend your GTD lists be created as new lists in To Do.

Example of lists view:



Example of projects list:



Integrating Email

Turning emails into new tasks is possible with To Do, depending on the Mail application you are using. The most straightforward and seamless integration with Mail and To Do will be if you are using Outlook on the web. This will allow you to drag an email to the right margin of Mail on the web and create a new Task in To Do.

To integrate your Outlook Calendar and To Do with Outlook email, click on the My Day icon in your inbox.



Once clicked, a snip of your Calendar and To Do lists will appear in the right margin. To create a new Event (Calendar entry) or task (To Do item), click and drag the email over to the My Day view in the right margin. Drop the email over the box for the type of entry you'd like to create. Right-click to change any properties of the task, including assigning it to the correct list. An email icon appears in the task, allowing you to click on the Cloud-stored email to easily get back to it.



Tagging

To Do also offers the additional functionality of tagging, which is not possible in Outlook for Windows. Tagging gives you the ability to easily link and view related items, such as all items related to a particular topic or Area of Focus.

TEAM WORKFLOW IN MICROSOFT 365

Microsoft 365 offers two applications for dynamic and productive collaboration: Planner and Teams. They can be used as stand-alone applications or Planner can be integrated into Teams to capture and track team projects next actions.

MICROSOFT PLANNER



USING MICROSOFT PLANNER FOR TEAM WORKFLOW

Planner is an excellent option for tracking and bringing visibility to actions being taken across the organization or within an intact team. It's built in the Kanban board style of list management, with Buckets representing lists and tasks within each Bucket representing assigned actions.

Advantages of Planner	Key Features of Planner
<ul style="list-style-type: none"> • Easy and intuitive user experience • Assign tasks to people added to a Plan • Efficient collaboration through transparency about task assignment and statuses • Visual display of tasks, statistics, etc. • Reduces the need for coordination and agreement via email or in meetings • Shared files are stored and saved in SharePoint 	<ul style="list-style-type: none"> • Create task boards for management and assignment of tasks • Different grouping options of tasks (buckets, assigned to, status, due date, names, and priority) • Status diagrams and statistics • Project calendar: Displays scheduled tasks in a calendar that can be imported into Outlook • File exchange (using SharePoint) • Planner Hub: personal overview of all assigned tasks from all Planner boards within the same Microsoft 365 account • Integrate OneNote notebooks into the Planner board



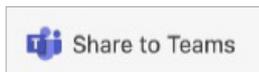
Mobile Applications and Web Client

Planner is available in a web client and as a mobile solution (smartphone, tablet). A desktop app for Windows and Mac is currently not available. However, the Teams desktop application gives you full access to all Planner boards created within Microsoft Teams and to the Planner Hub.

Sharing to a Channel:

As an alternative to emailing to the Channel, using the Share to Teams button in your Outlook for Windows or Mac ribbon. If enabled by your IT department, accomplishes the same result but even more efficiently. Share to Teams is not currently a feature in Outlook for Web.

1. Highlight or open an email you want to share to Teams.
2. Click the Share to Teams button in the ribbon. If you don't find it in your Outlook for Mac or Windows ribbon, look under the ellipsis to the right of the message when the message is in preview or open. If not there either, it's likely not enabled by IT for you.



3. Choose to send your email to a person, group (chat), or Channel by typing a name or choosing from recent items that appear.



Person – Sent through Chat

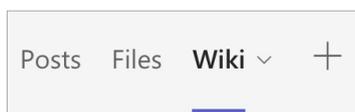
Group – Sent through Chat

Channel – Sent to Post feed for a specific Channel and a copy of the email is also captured under Files tab for that Channel

4. Add a message if you want to include additional information.
5. Click Share button to send to Teams.

USING WIKI IN TEAMS

Wiki in Teams is a simple notes-style app that is included as a default tab in all new Channels. You can also add additional Wikis through the + symbol.



At first glance, Wiki seems like an underpowered app and many people want to jump to add more sophisticated apps such as OneNote or Word. Give Wiki a chance. There's an elegant simplicity to it for capturing and managing information.

Wikis are structured in a similar way to OneNote, with Pages and Sections.

RECOMMENDED GOVERNANCE AND GUIDELINES FOR USING TEAMS

One of the challenges Teams users has been a lack of clear guidelines about how the Teams application is used. In many apps, how you choose to use it is up to you and your personal preference (like Outlook Tasks). Teams, however, is a team sport. As your use of Teams grows, it will be important to get clear on some guidelines and governance for how to use it productively. Here are some talking points to bring up with your team:

1. When are we posting to a team versus sending an email?
2. When do we send a chat versus send an email or post to a team?
3. Are we using Microsoft Planner to assign tasks or @mention? And is everyone clear how they will get notified when they are assigned a task?
4. How will new teams get created to make sure we don't have duplicates?
5. Who can create new teams and Channels?
6. What will be the naming convention for creating new teams?
7. Where will files be managed? In Teams Files tabs, SharePoint, or other location?
8. How should files be shared? Link to the file or send original file?
9. When should teams be archived, if at all?
10. What will be our quality check system to see if how we're working is working?