



TEXAS TECH UNIVERSITY

**Task Management System using Office 365
TAIR 2021**

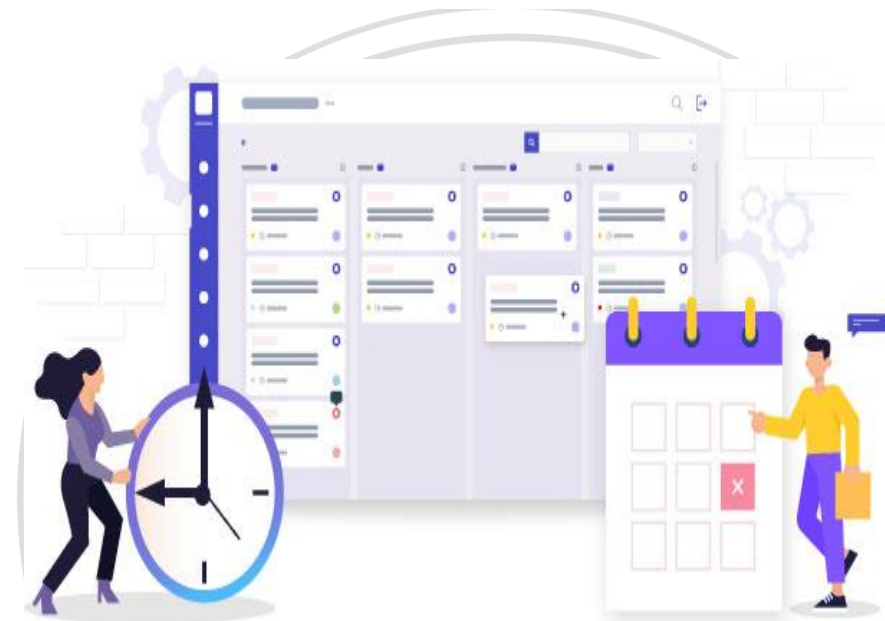
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March 2nd, 2021



Why Task management is important?

- 👉 Improve Productivity
- 👉 Improve Efficiency
- 👉 Reduce Stress
- 👉 Prioritization of Tasks
- 👉 Central location of all requests and provided data
- 👉 Minimize risks of losing requests
- 👉 Saves time



Source: <https://www.peppybiz.com/blog/visual-task-management>



What is Microsoft Flow?

Microsoft Flow is a process and task automation tool that helps connect different applications and services together.

“**Microsoft** itself defines **Flow** as a tool to “create automated workflows between your favorite apps and services to get notifications, synchronize files, collect data and more”

Microsoft Flow Home Screen



- Home
- Action items
- My flows
- Create
- Templates
- Connectors
- Data
- Monitor
- AI Builder
- Process advisor (preview)
- Solutions
- Learn

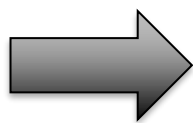
Take care of what's important. Automate the rest.

Create automated workflows with Microsoft Power Automate.

Watch a quick video

Start from a template

- Top picks
- Remote work
- Email
- Notifications
- Save to cloud
- Approval

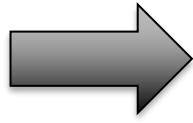


 Save Office 365 email attachments to OneDrive for Business By Microsoft Automated 717700	 Get a push notification when you receive an email from your boss By Microsoft Automated 401495	 Send a customized email when a new file is added By Microsoft Automated 313121	 Get today's weather forecast for my current location By Microsoft Instant 304395
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[All templates](#)

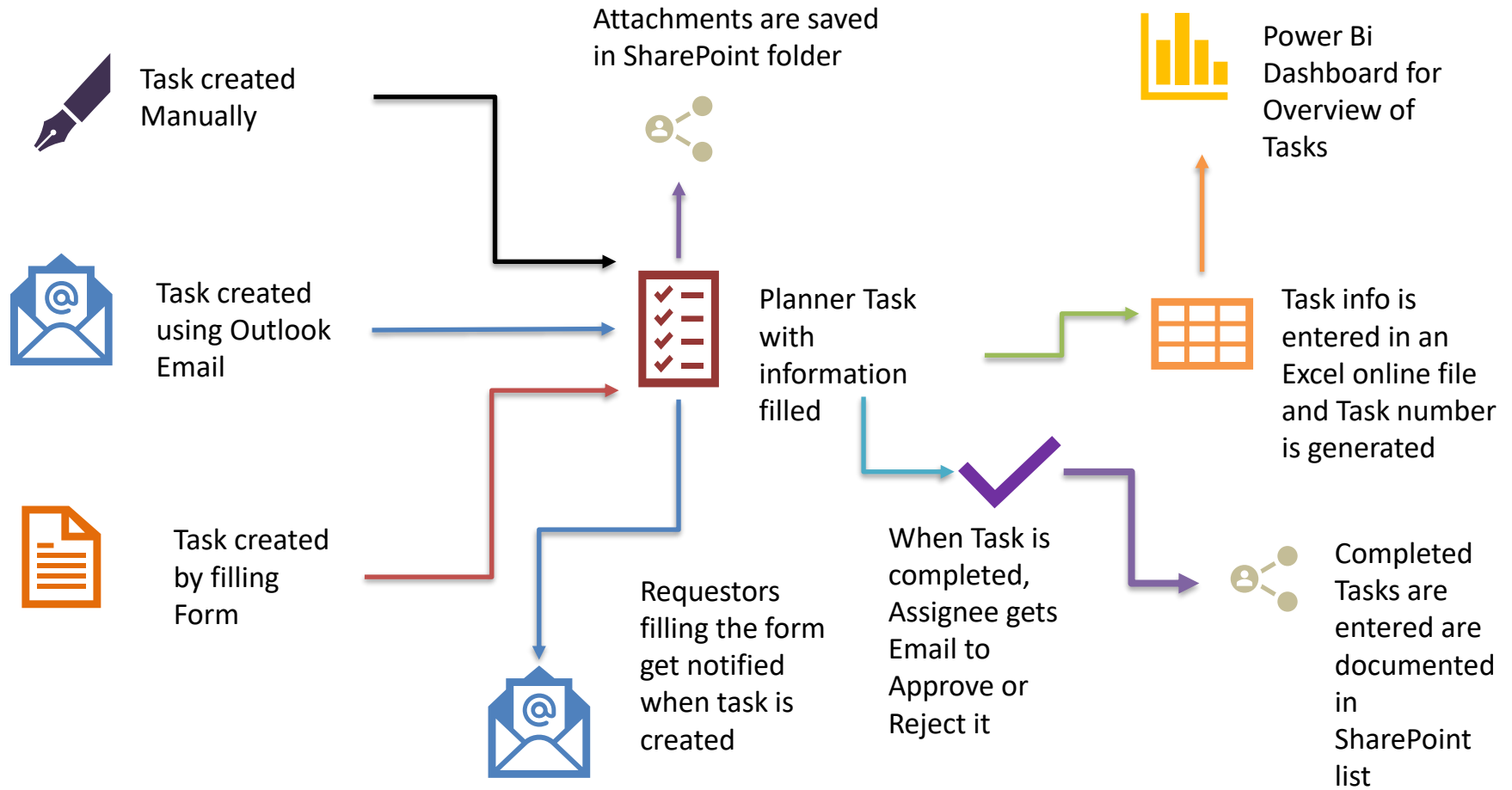
Popular services

[See all 441 services](#)



 SharePoint	 Office 365 Outlook	 OneDrive	 Twitter	 Dropbox	 Outlook.com	 Dynamics 365 (deprecated)	 Yammer	 Excel Online (Business)	 Google Calendar
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Task Management Flow Chart - Demo





Creating Planner Task using Forms



Forms

The Form is first filled in and submitted and attachments are uploaded if any



SharePoint

The Submitted form data is sent to SharePoint file and attachments are uploaded in Forms folder



Planner

Once record gets created in SharePoint, a task is created and details along with attachment link are updated

Microsoft Forms to Planner Demo



Please use below link to see the demo video

[Forms to Planner Video](#)





Creating Planner Tasks using Outlook



Outlook

Email with a specific key word in subject is sent to the people whom task is to be assigned



SharePoint

Folder with email subject is created and attachments are saved



Planner

Task with email subject is created with details and attachment links

Microsoft Outlook to Planner Demo



Please use below link to see the demo video

[Outlook to Planner Demo Video](#)





Completion of Tasks, Approval (Outlook Email) and saving a log file



Planner

Task is completed by clicking the complete button



Outlook

Approval email goes to supervisor to approve/ reject the task



SharePoint

If the task is approved, details of task are saved in a SharePoint list

Completion of Tasks, Approval (Outlook Email) and saving a log file



Please use below link to see the demo video

[Approval, Sharepoint and Planner Demo](#)





Getting Planner tasks across Teams into Power Bi



Planner

When a Task is created, made in progress or completed an Excel sheet is updated automatically



Excel Online

This Excel Sheet keeps track of the Task and provides unique Task number



Power BI

Dataset is created using Excel online and is refreshed automatically

Getting Planner tasks across Teams into Power Bi

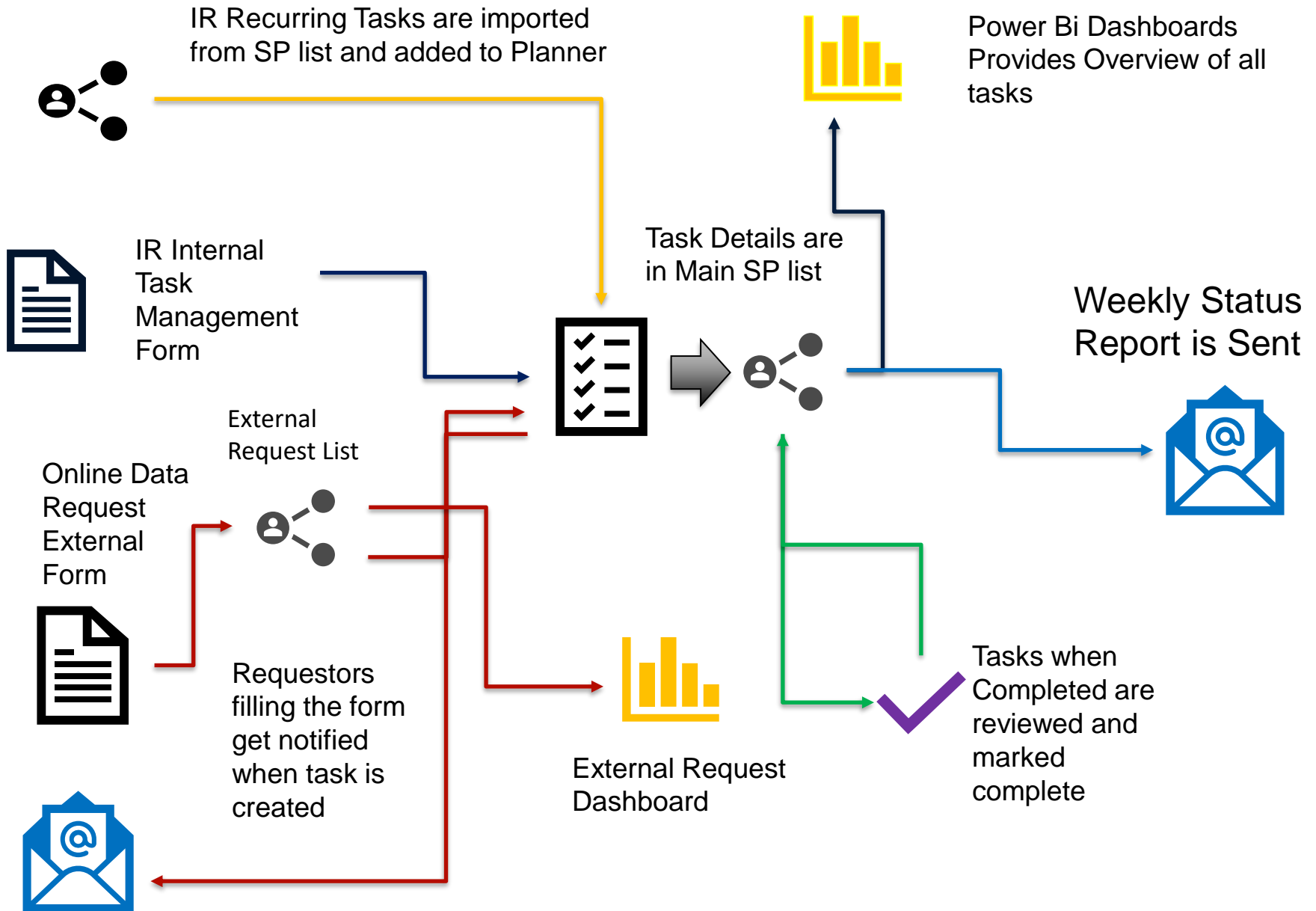


Please use below link to see the demo video

[Planner to Power BI Demo](#)



IR Task Management Architecture





Dashboard – Not Started & In Progress tasks



Dashboard – Completed Tasks





Flows which run behind the scene



Task Creation : Runs whenever form is submitted



Task Updates: Right now, each team has a flow running every hour to check for updates and update the tasks list excel



Manual Task Creation: Runs when Task is created manually in planner, removes task content and sends email to the creator to use forms for task creation



Task Completion: Runs when task is completed to update completed by field, start and complete review process



Current Features

Drill through
capability from
Dashboard to
Planner task

Ability to filter
tasks based on
individual

Weekly Status
Report Email

Thank You



Thank you for your time!

Questions?



TEXAS TECH UNIVERSITY®
From here, it's possible.