



The Advisor Advocate

Digital Planning Tools

The work life of an advisor can often feel like juggling. In this issue, we suggest some of the free tools available for Faculty and students that can assist with planning and scheduling all of the items on our to-do lists. Microsoft 365, in particular, offers great tools to explore, such as Planner, Project, and Teams.

Tool Spotlight: Microsoft Planner



Planner helps you prioritize tasks in a visual, collaborative format. Tasks can be viewed as “Kanban boards” - a project management format borrowed from Japanese Lean method.



From Office 365, click on “App Launcher” in top left corner

Search all of your apps

Search Office Apps for “Planner”

Office apps



Bookings



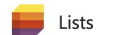
Calendar



Excel



Forms



Lists



OneDrive



OneNote



Outlook



People



Planner



PowerPoint



Project

From Planner Hub, click “New Plan”

Name your plan, add to a group and create plan.

Add and assign Tasks and create categories called “Buckets.” View your tasks in several formats - by Kanban Boards, charts, and schedule. Planner allows you to attach files to tasks, export your plan to Excel, and integrate with Microsoft Teams.

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