Minerva Messenger

Boards and Playbooks
v.3. 05.04.2022

MAX PLANCK
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Agenda

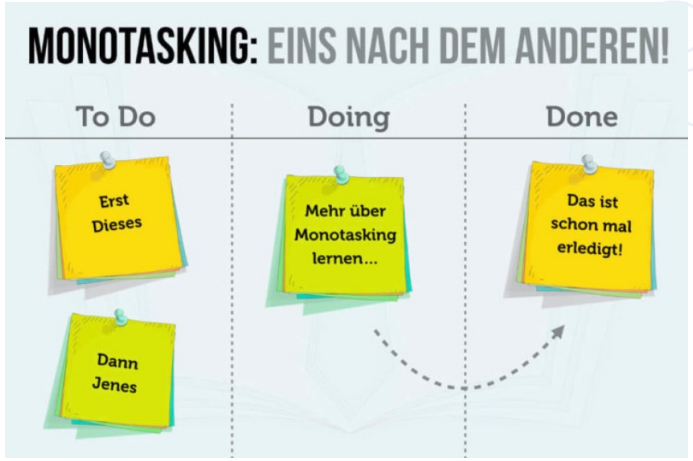
Introduction of new Mattermost features / project management functions:

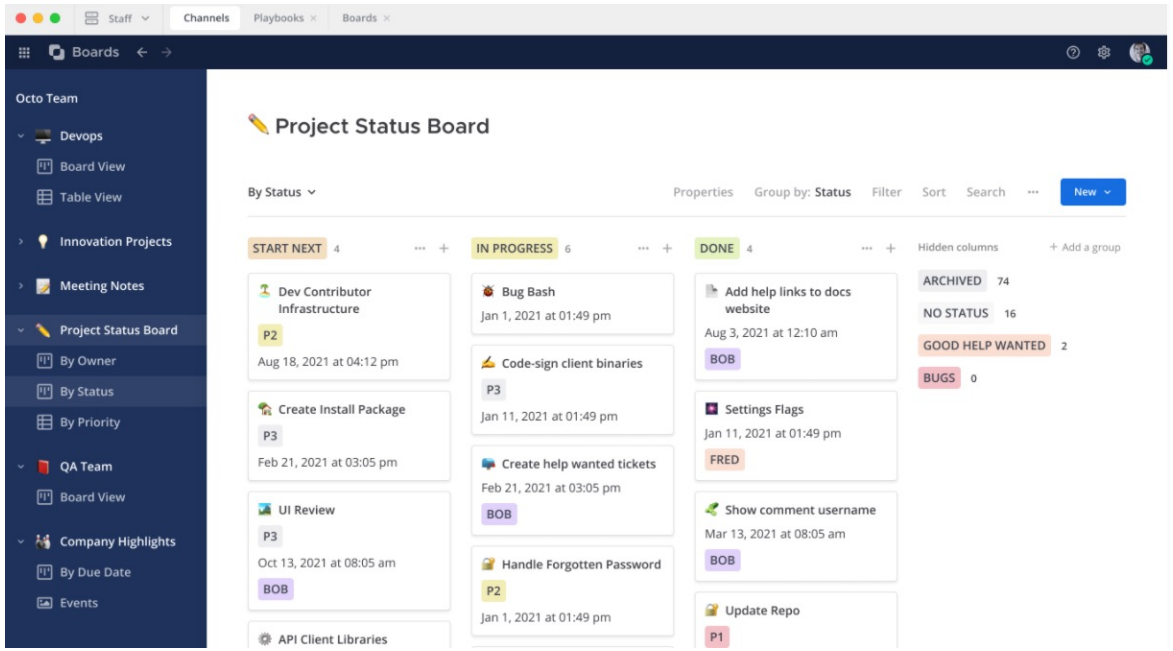
1. Boards → to manage tasks
2. Playbooks → to manage „runs“ / repeatable processes

Boards – in brief

Boards help …

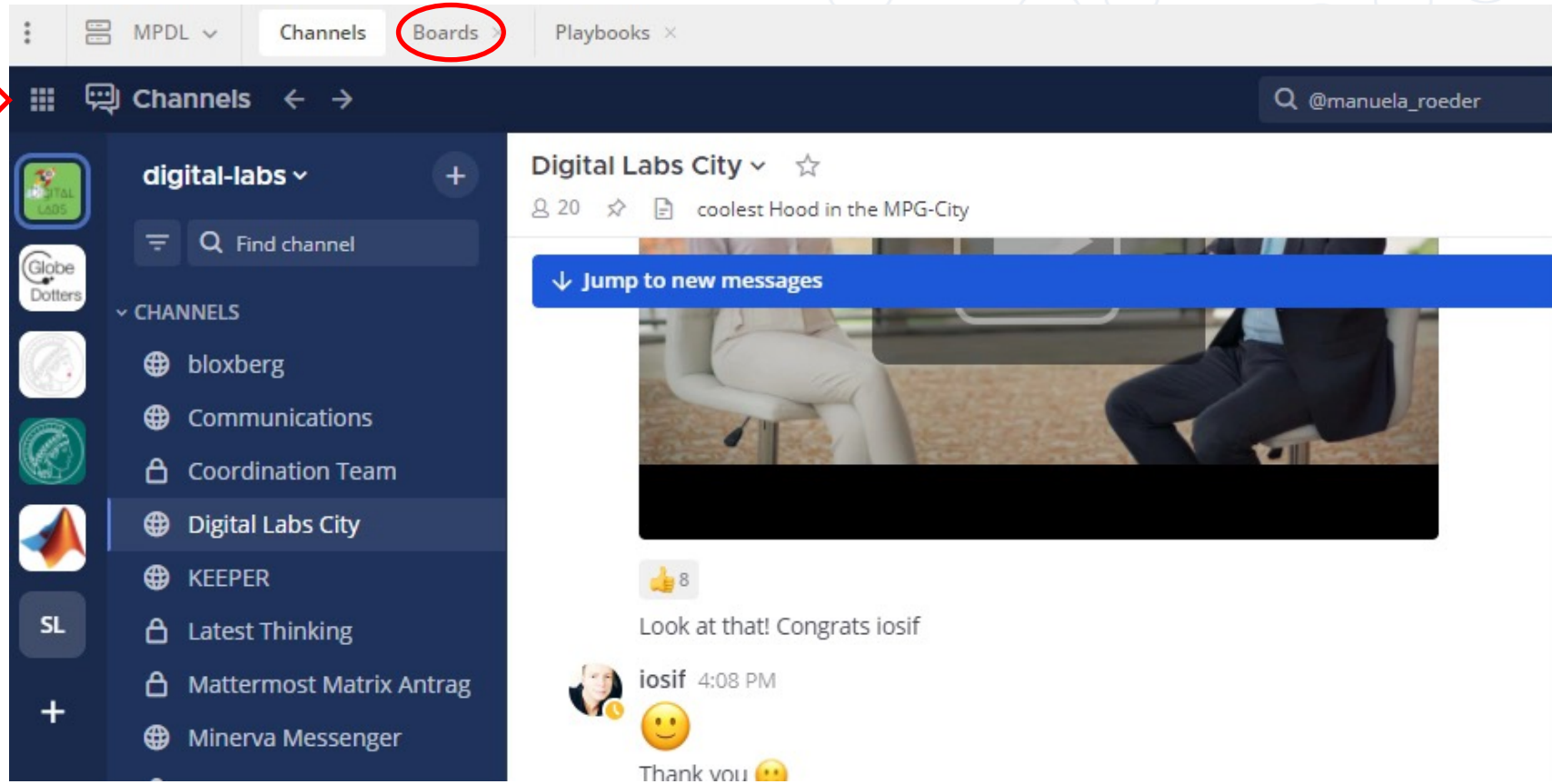
- to manage projects and tasks via a familiar **Kanban board structure**
- to keep everyone in **your team / organization** in the loop
- to stay on schedule with clearly defined **tasks, owners, checklists**, and **deadlines**.





Boards – how to access

1. Via Desktop Client
2. Via Browser*
3. No access via mobile devices (mobile phone, iPad), only messages from boards: bots are visible



*the video is from Desktop Client, where two access ways are possible; if you like to access Boards via the browser you need to click the symbol at the left of the screen

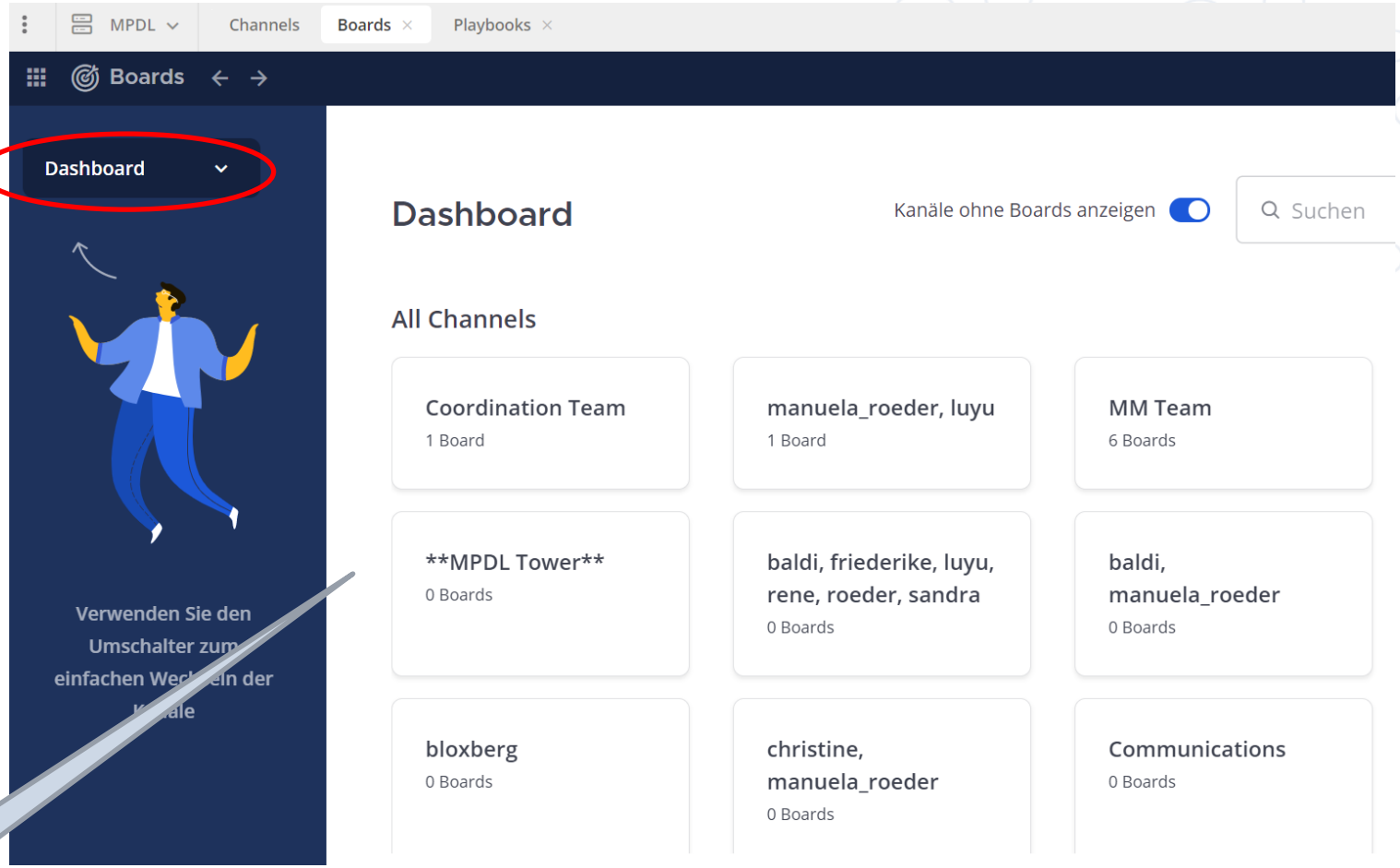
Boards – access rights

- Boards uses **“channel-based”** or **“Direct-Messaging-based” permissions**, meaning that all members of the associated channel (private, public) or Direct Messaging chat (group) can access the boards with rights to **read, write and delete.**

- Or you can share a **read-only version** of any **board / card** with anyone who has the link.

Boards – how to start

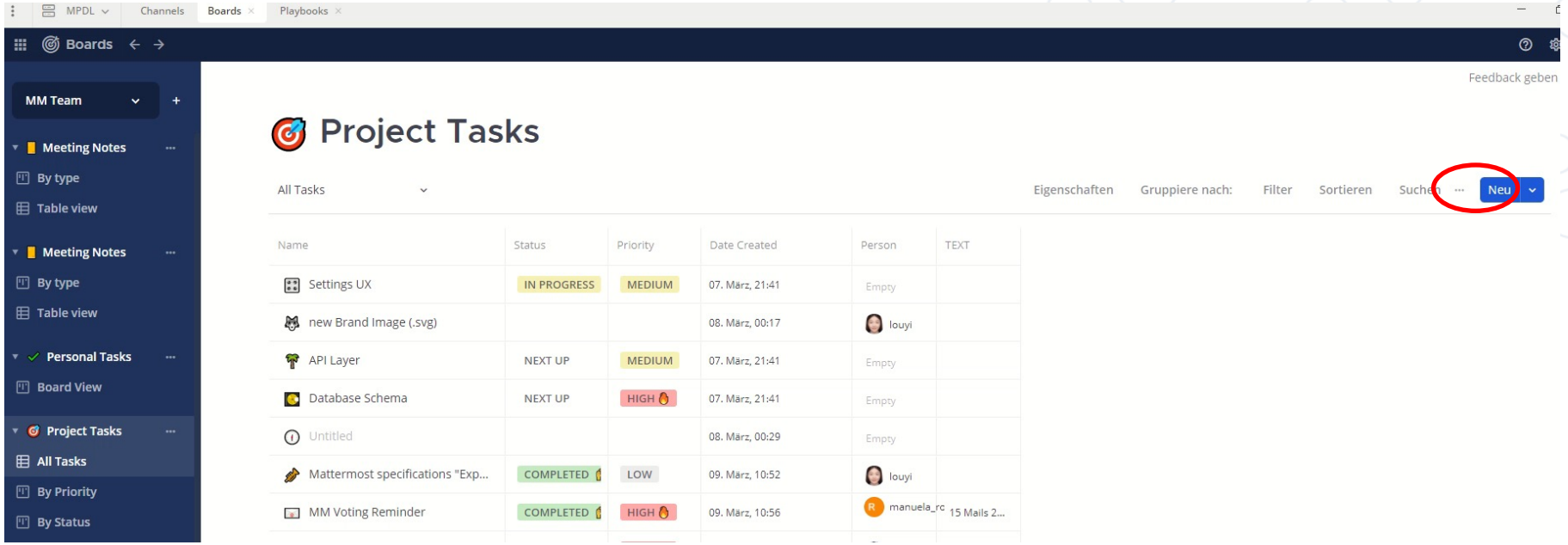
1. **Who** should have access? Which access rights? Private vs. public Channels? Direct Messaging / Chat?



Select

Boards – share link

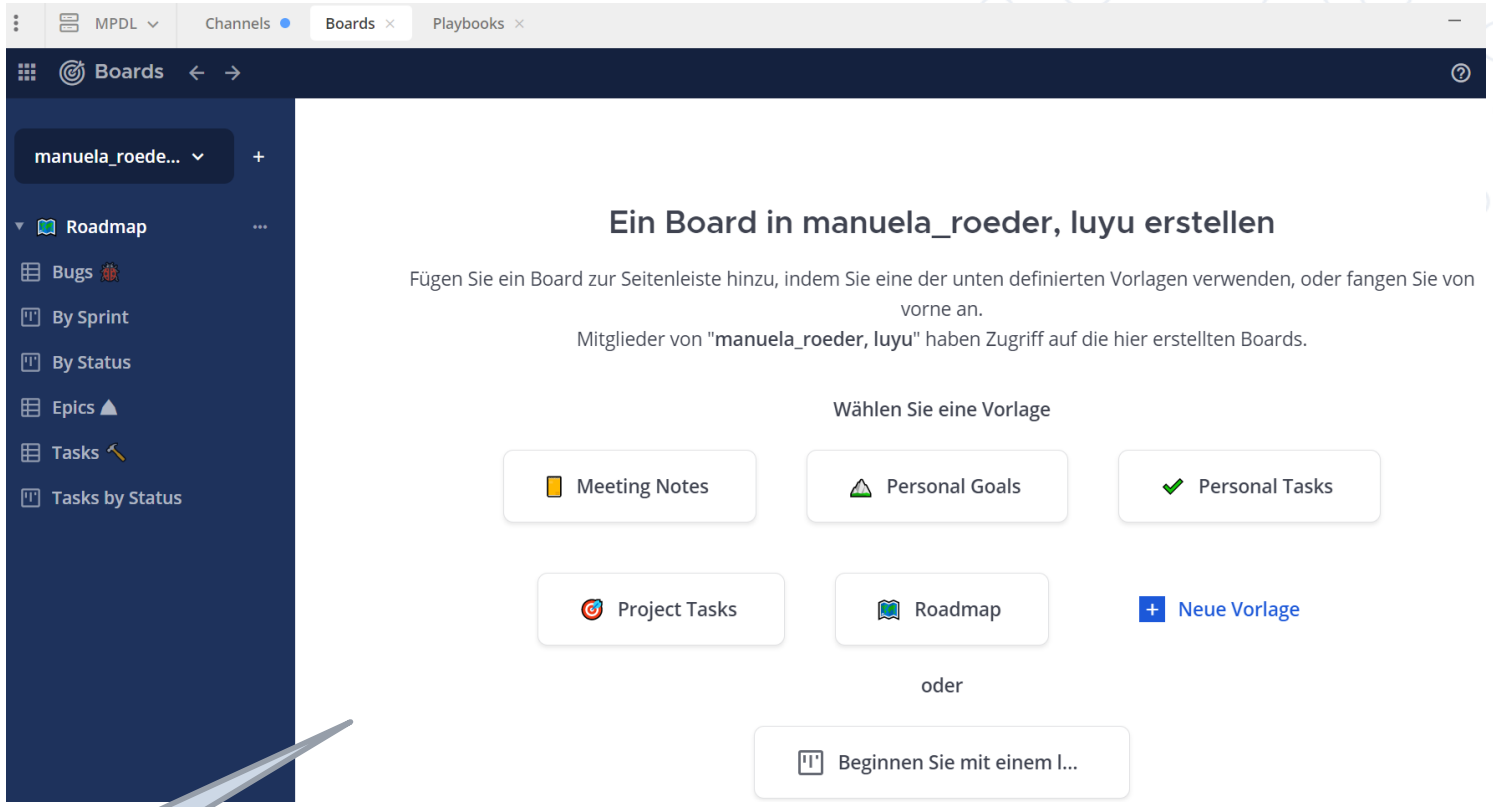
- Send “**read only link**” for Board or Card



Boards – how to start

2. **What** would I like to manage / document with Boards?

   - Select template, customize template or create completely new template

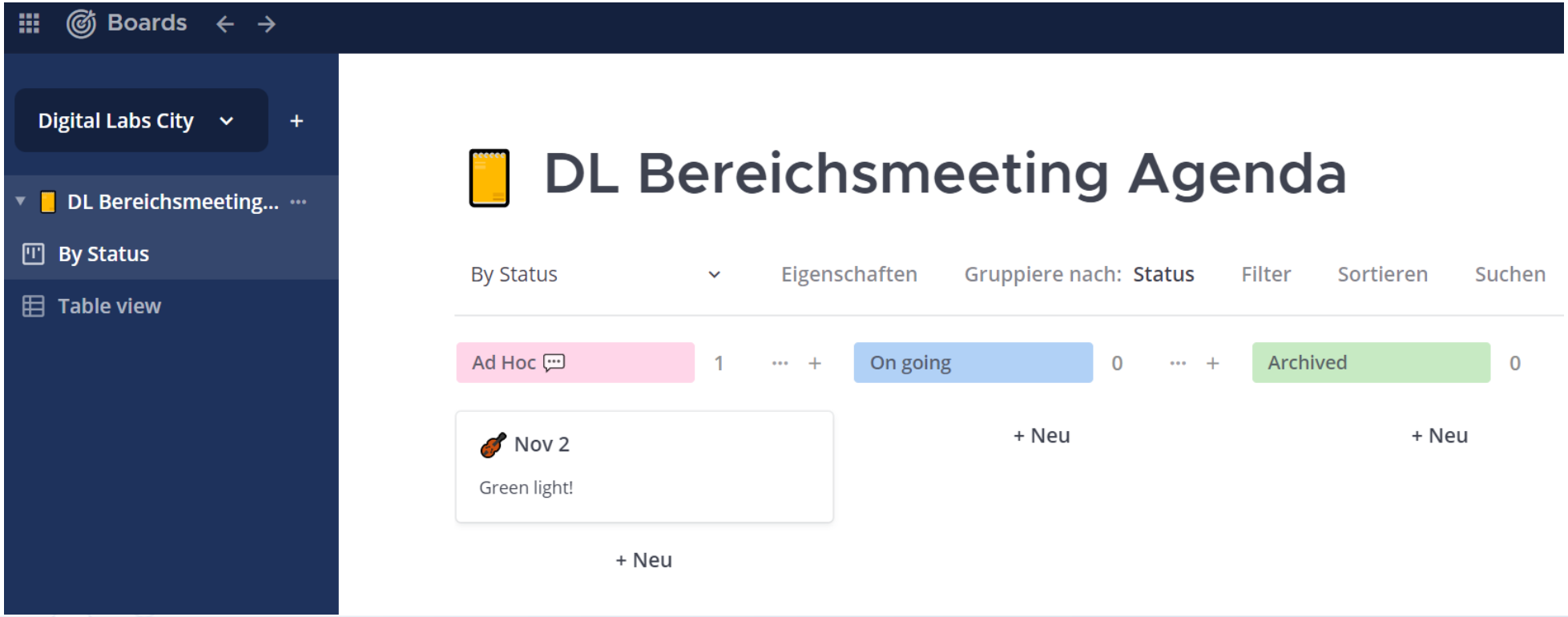


Select

Boards – how to start

2. **What** would I like to manage / document with Boards?

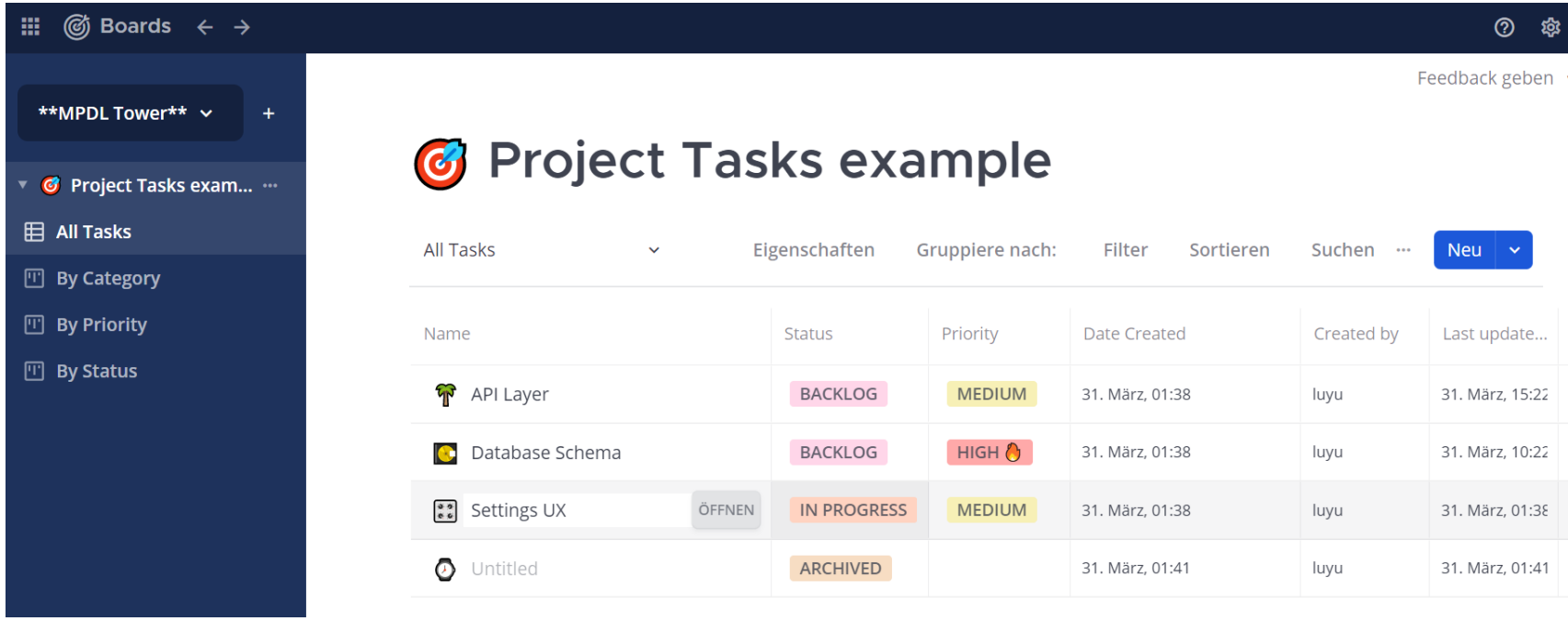
Different examples: Meeting Notes



Boards – how to start

2. **What** would I like to manage / document with Boards?

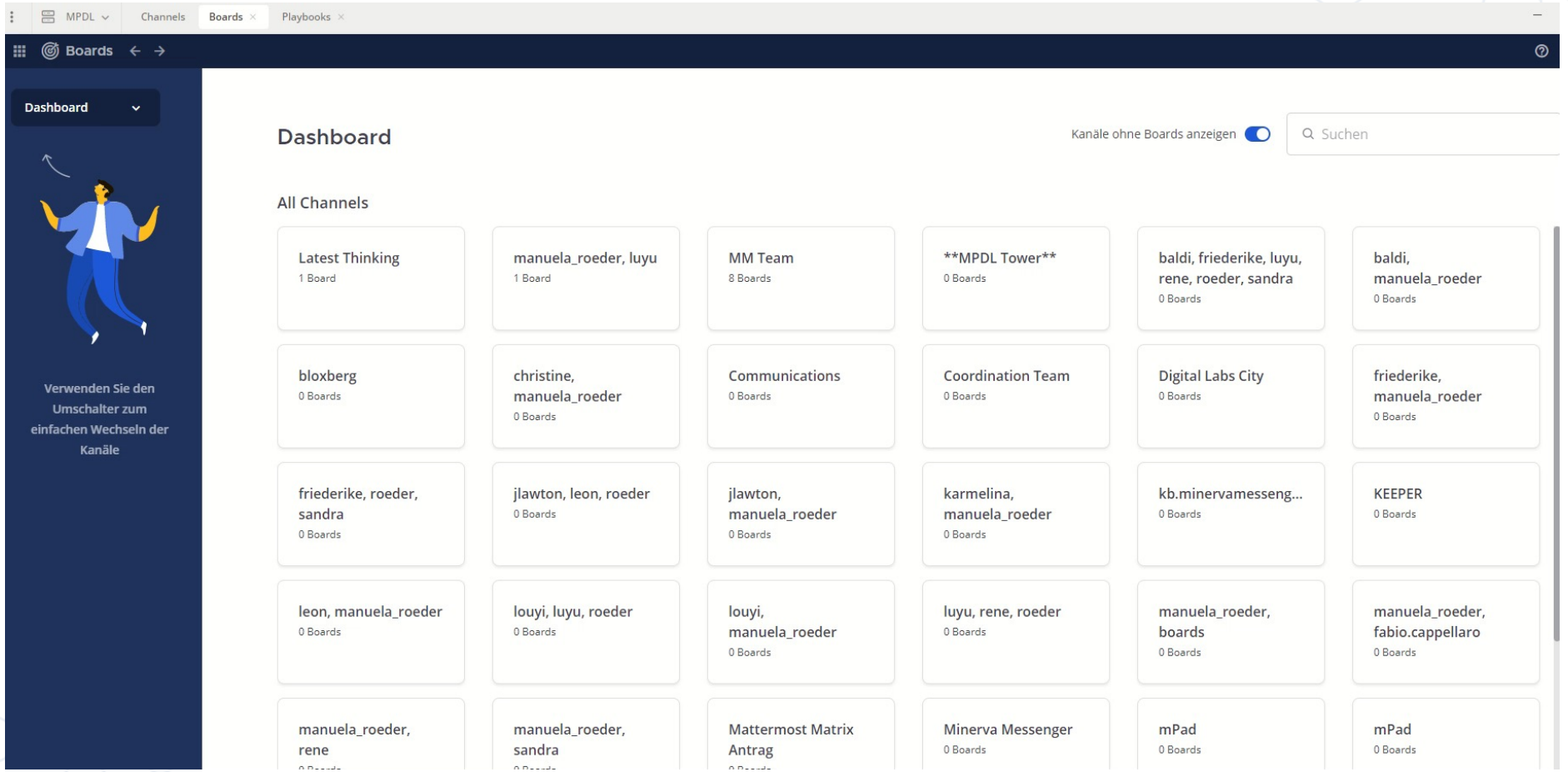
Different examples: Project Tasks; edited template*



*Editing only possible if you have selected a card; it is not possible to edit in the Board view

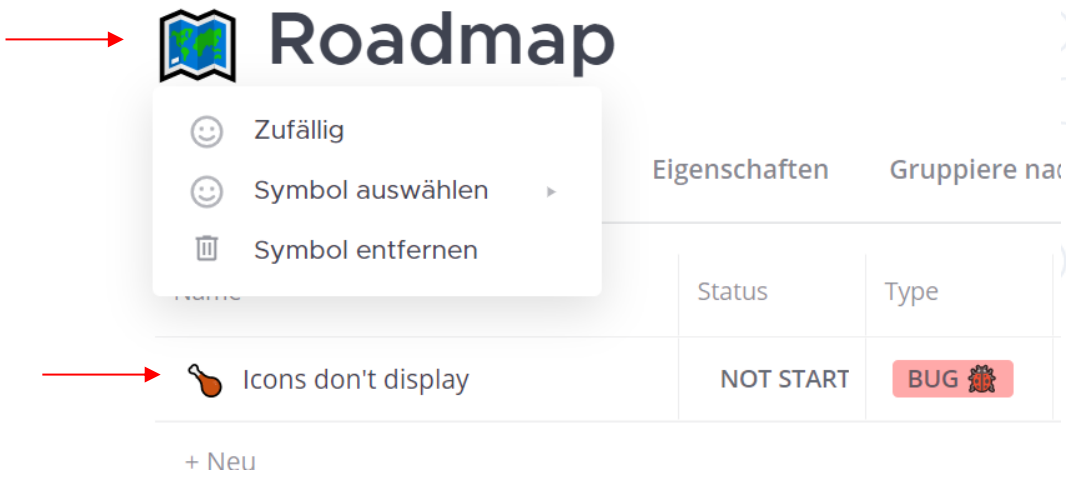
Boards – how to start

Example Project Tasks
Latest Thinking



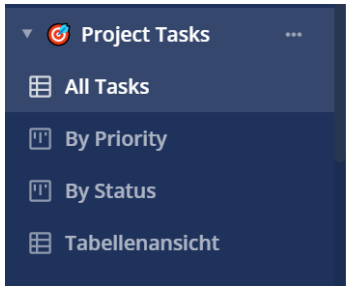
Boards – features I

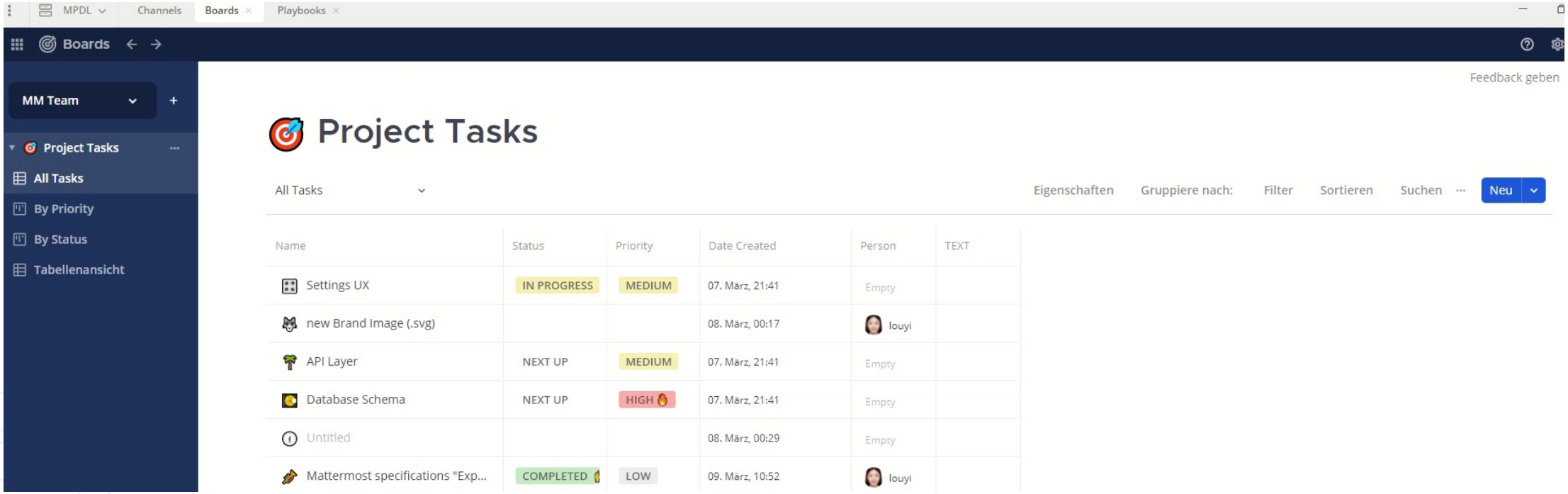
- **Icons** – selected randomly, can be changed click on icon



Boards – features II

- **Different views**

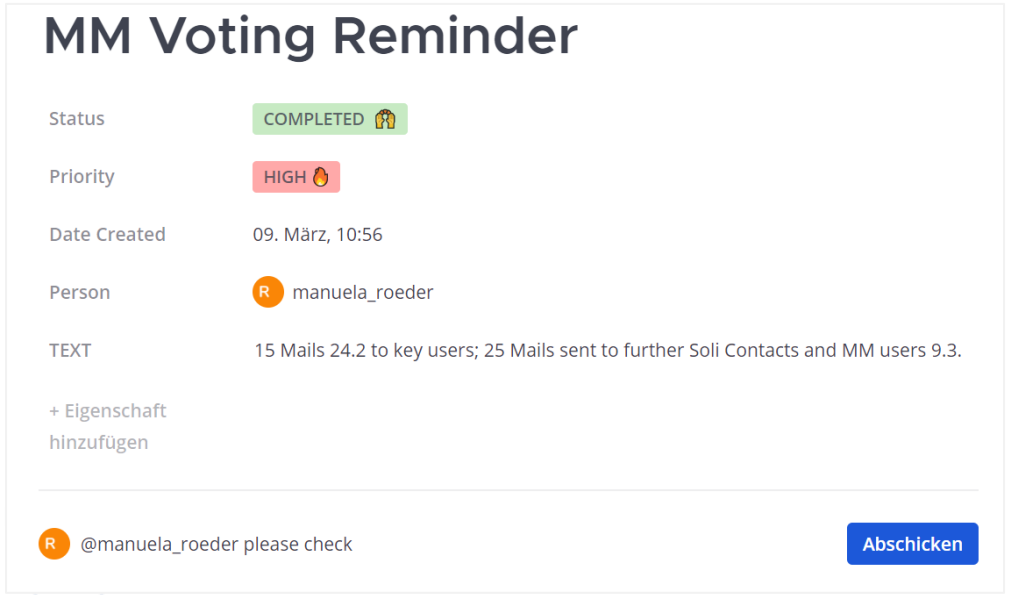


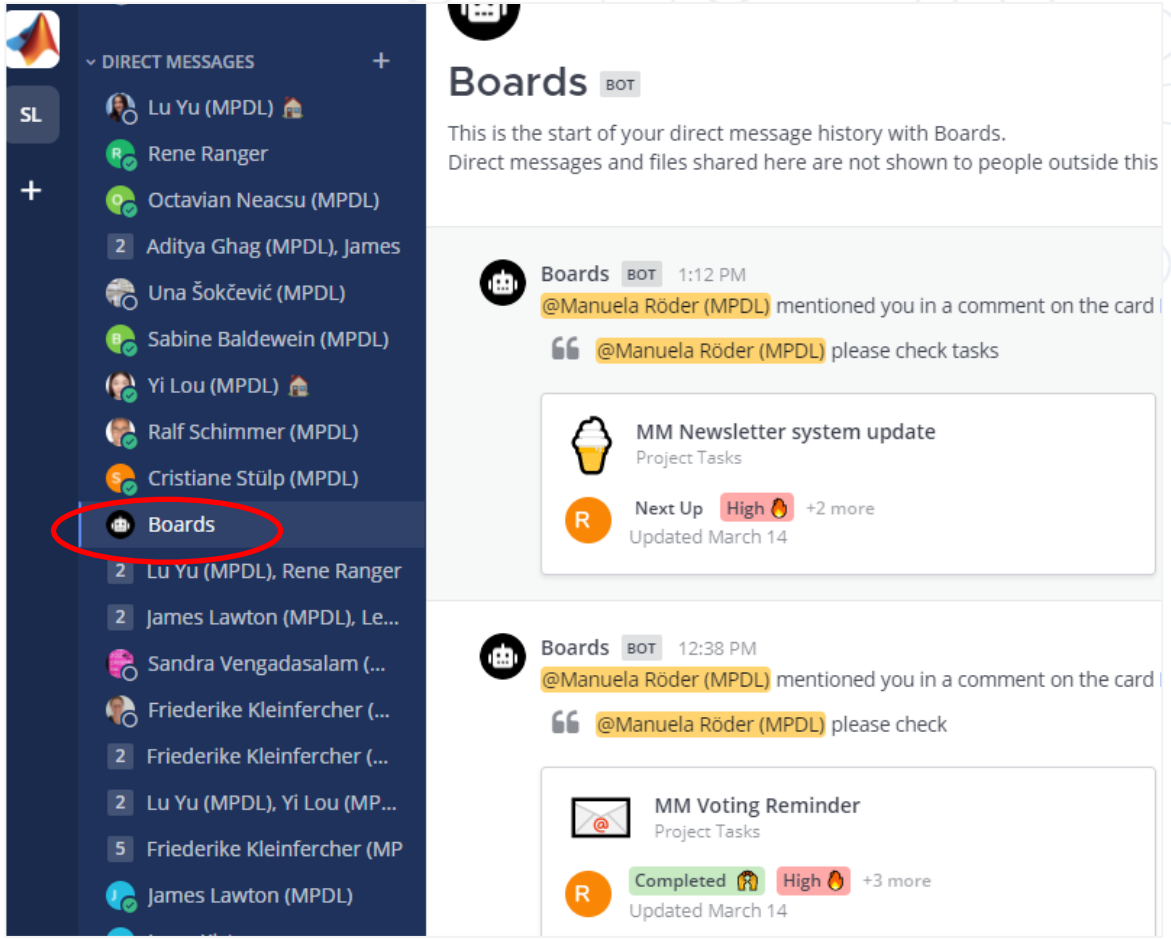


Boards – features II

Notifications:

- Go to card
- and send message @username, @channel





Boards – features III

- Drag cards, e.g. if task is completed
- Edit Boards, edit Cards
- Export, Import → to archive and / or if you like to copy one template into another channel

Boards – conclusion

Plus / What´s in?

- In Minerva Messenger integrated **project management functionalities**
- based on existing team **channel structure** and / or **chats / chatting groups**
- Tool to manage
  - Project **Tasks, Project Roadmaps** for epics, bug fixing etc.
  - **Meeting Notes**
  - **Personal Tasks** and Goals

Minus in usability / Bugs / Features not yet available

- It is not visible who has created a Board.
- Boards **can be deleted by any channel member.**
- A board template can not be edited directly, you need to **select a card and can start editing** here, e.g. add new columns, rename columns…
- **No Gantt Chart View** (illustration of timelines).
- If the same channel name is used in different teams, you can not distinguish on the Dashboard view the participants and team affiliation.

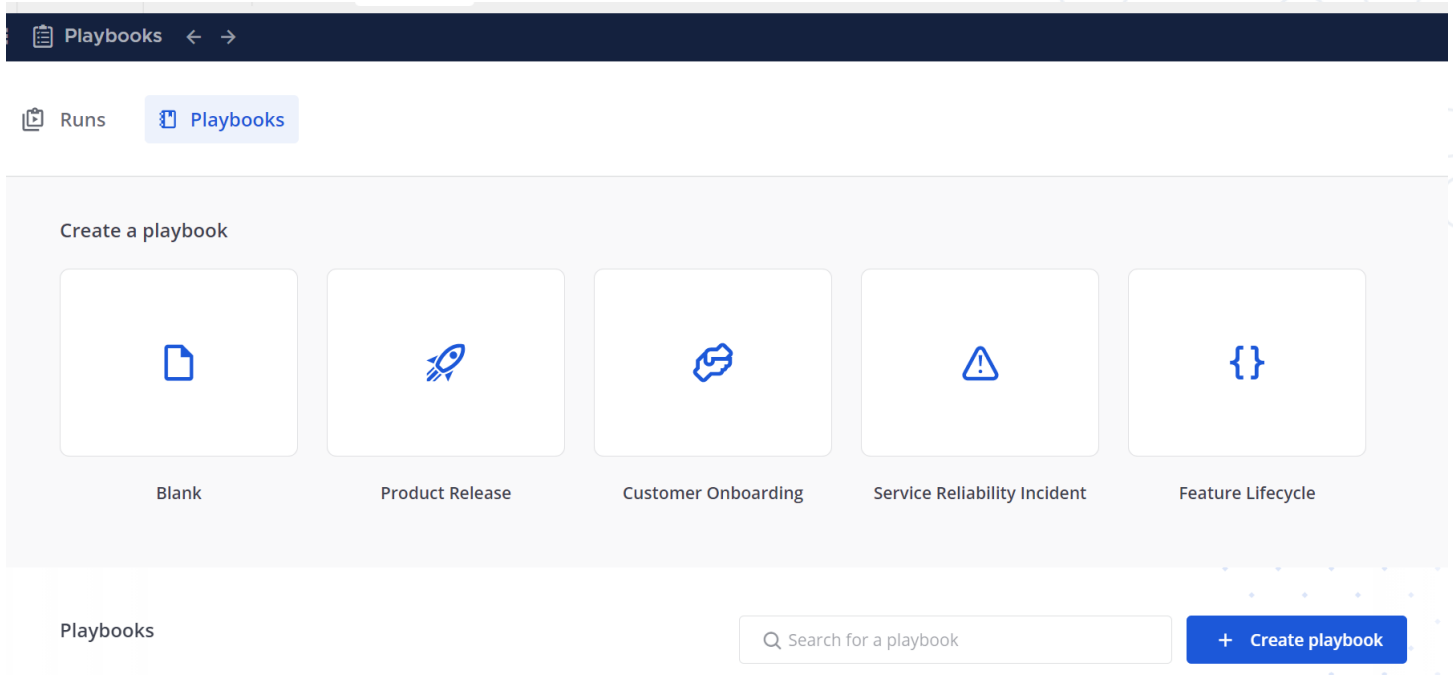
Agenda

Introduction of new Mattermost features / project management functions:

1. Boards → to manage tasks
2. Playbooks → to manage „runs“ = repeatable processes

Playbooks – in brief

- pre-built, **configurable checklists**
- **repeatable process,** specific outcomes,
- e.g. Bloxberg consortium members on boarding, employee on boarding, MM Slack migration...
- **Runs trigger** to perform automated **actions**
- **Retrospective summary reporting**



Playbooks – how to access

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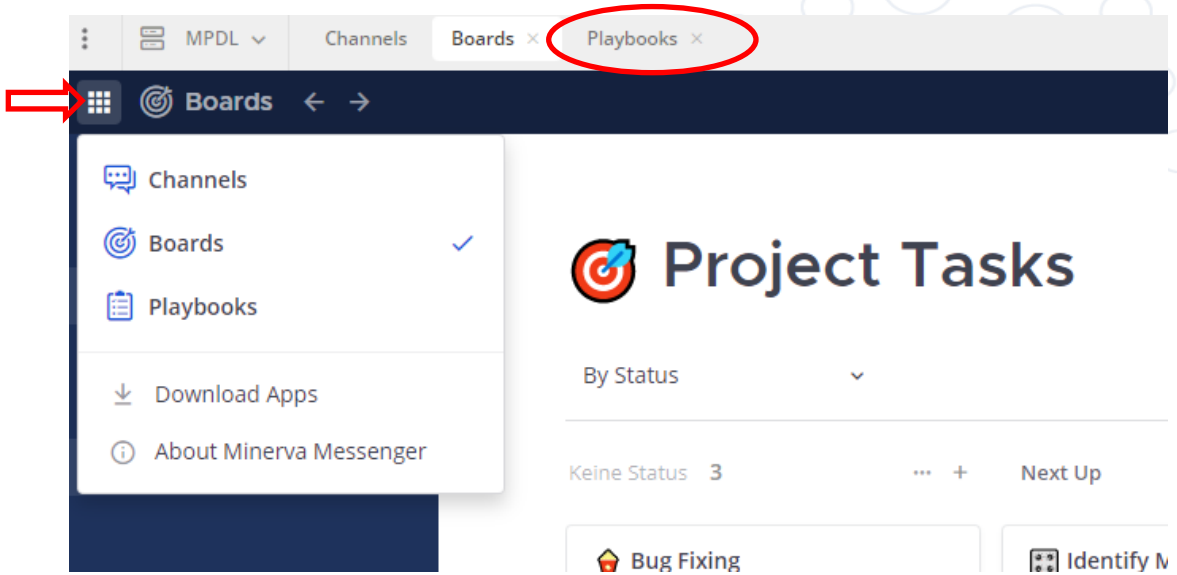


*Screenshot is from Desktop Client, where two access ways are possible; if you like to access Boards via the browser you need to click the symbol at the left of the screen

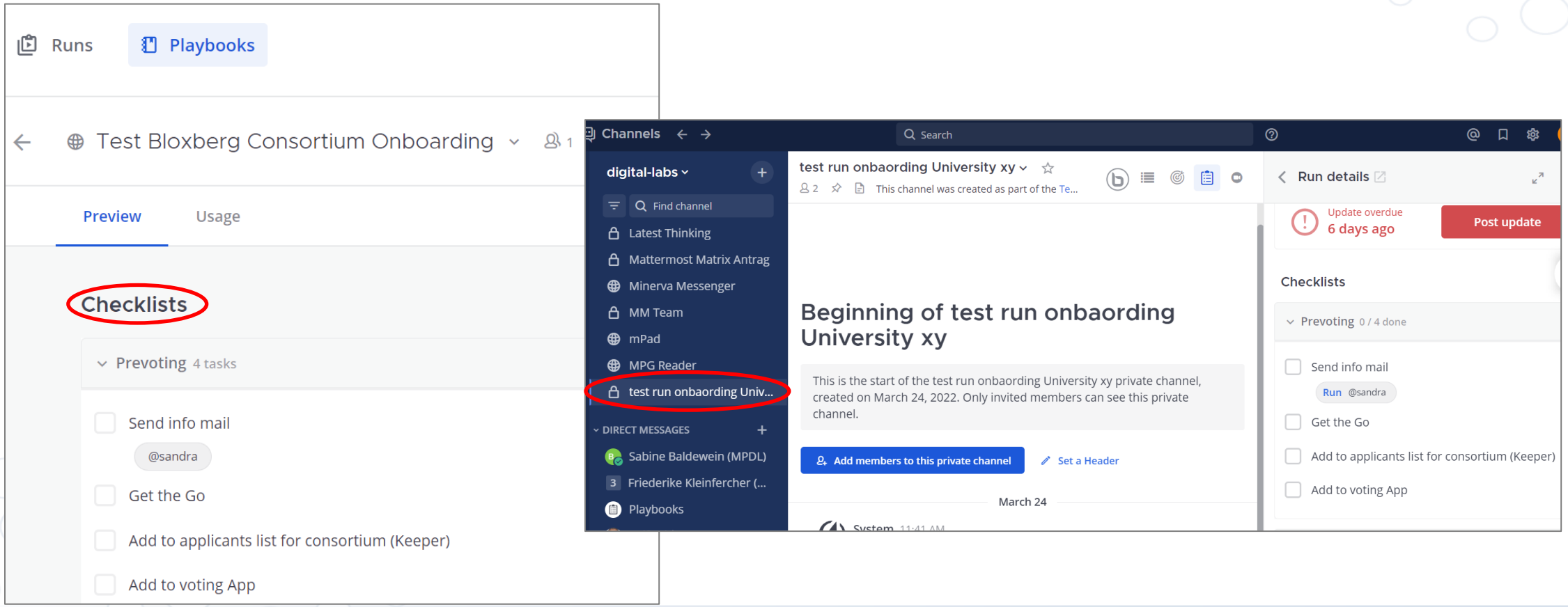
Playbooks – access rights

- Generally Playbooks uses “**team-based” permission.**
- MinervaMessenger user generally can only create **public**

  Playbooks (private Playbooks are only an option for Enterprise user. The MinervaMessenger user is a professional licence; it is a bug, that we can see „Create playbook“->“private playbook“).
- Playbook **Runs are run privately as private Channel**. Members need to be added.

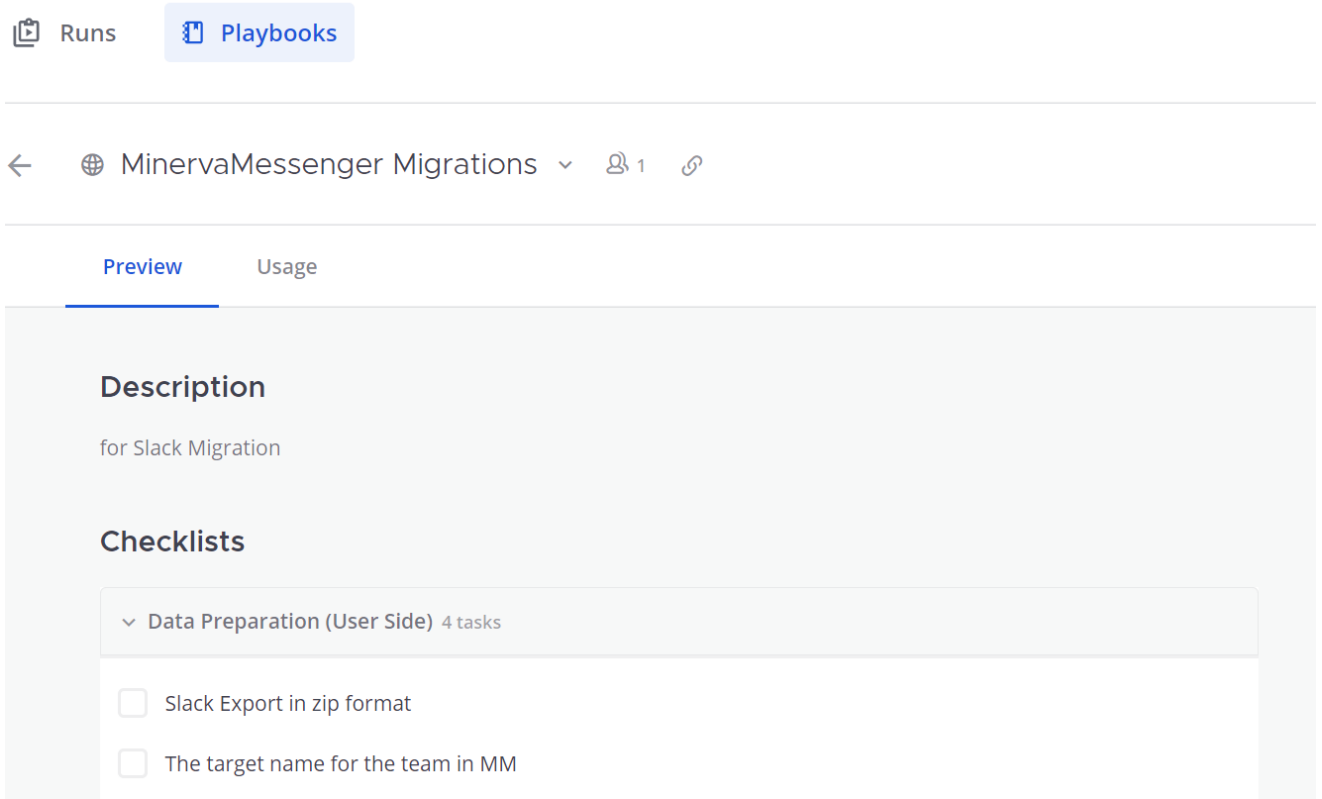
Playbooks – Runs

- Examples of **Playbooks** (checklists of repeatable processes) and **Runs** (Run: the process is kicked off for a dedicated event, e.g. Bloxberg Consortium member on boarding / on boarding of university xy):



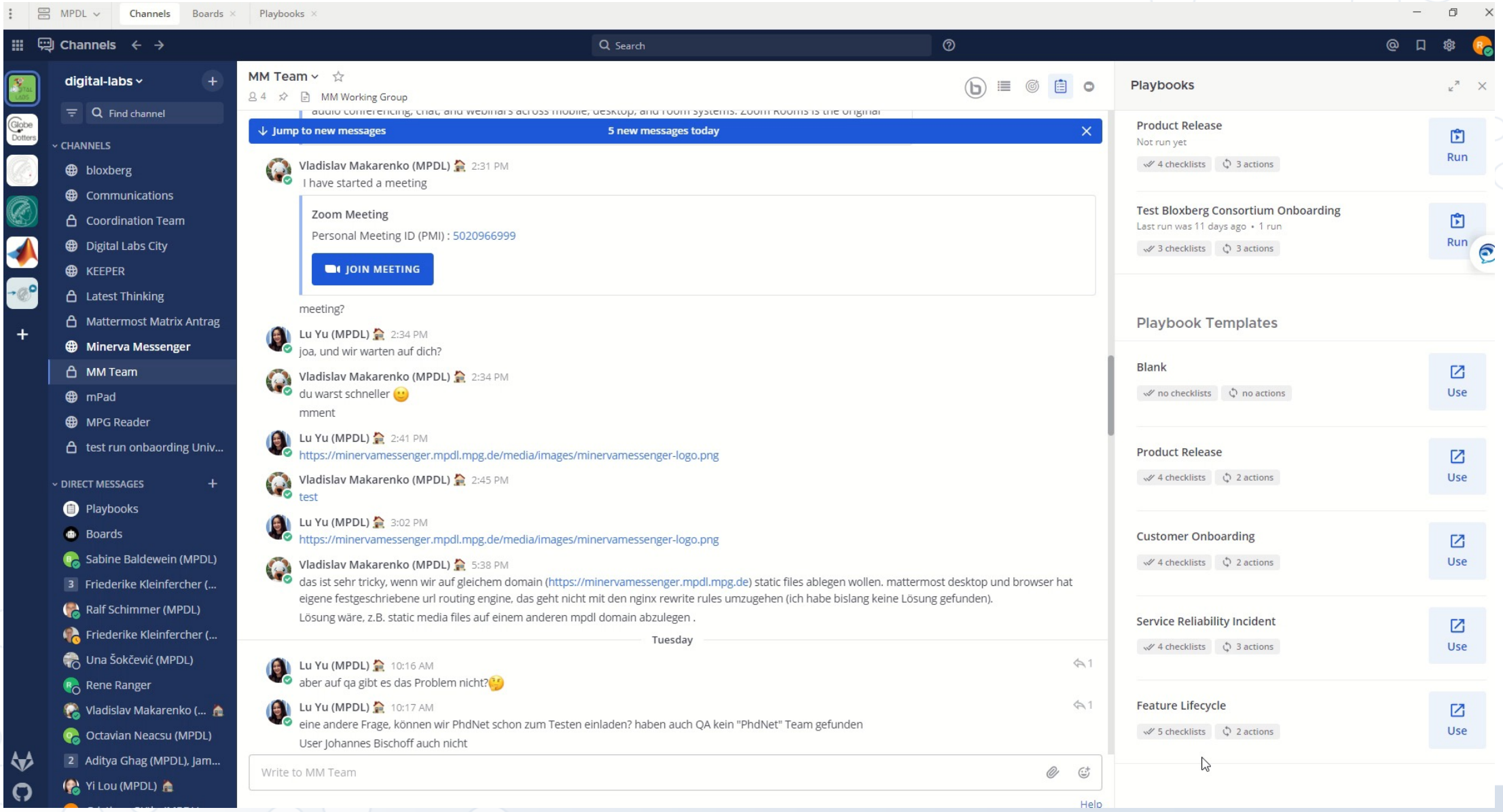
Playbooks – how to start

- Examples of Playbooks and Runs:
  Minerva Messenger Slack Migration



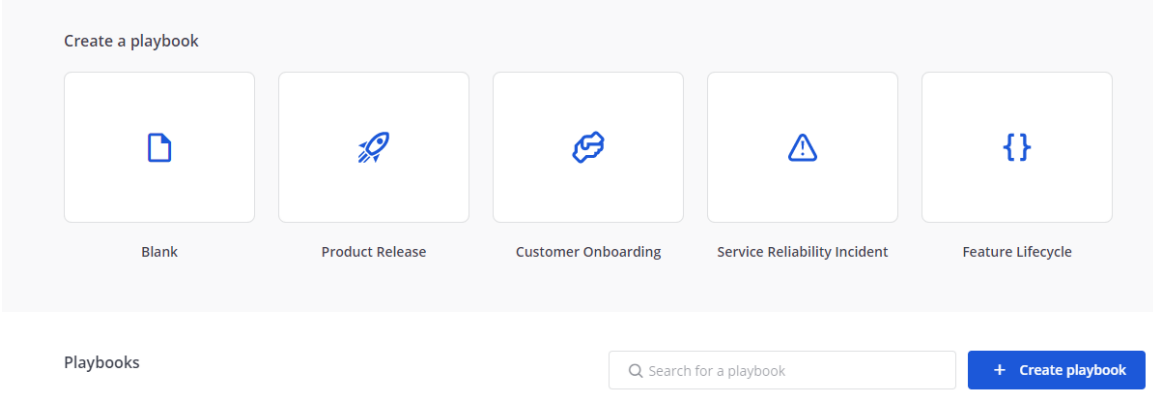
Playbooks – how to start

Example Employee on boarding

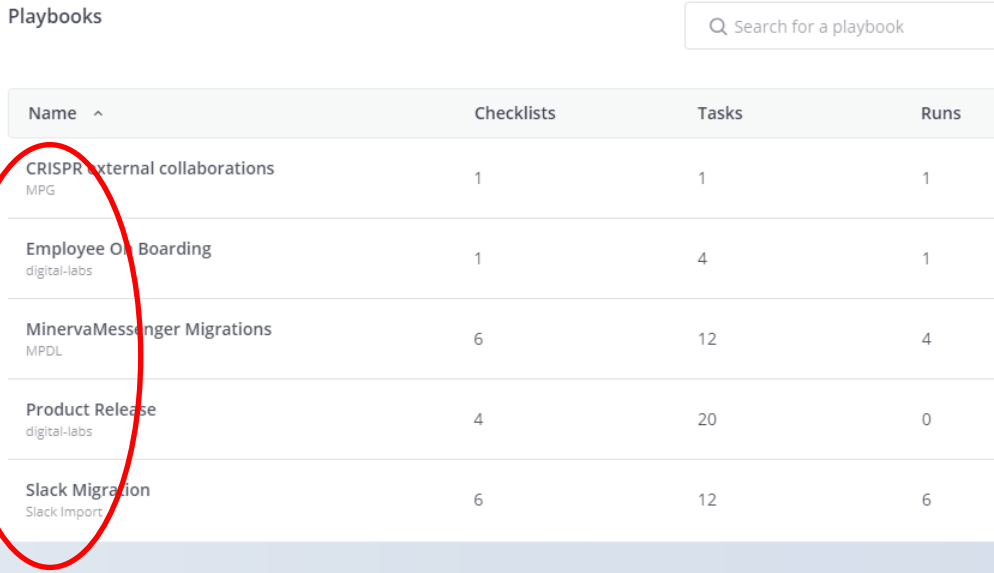


Playbooks – What else is important

- You can work with a template or create your own Playbook

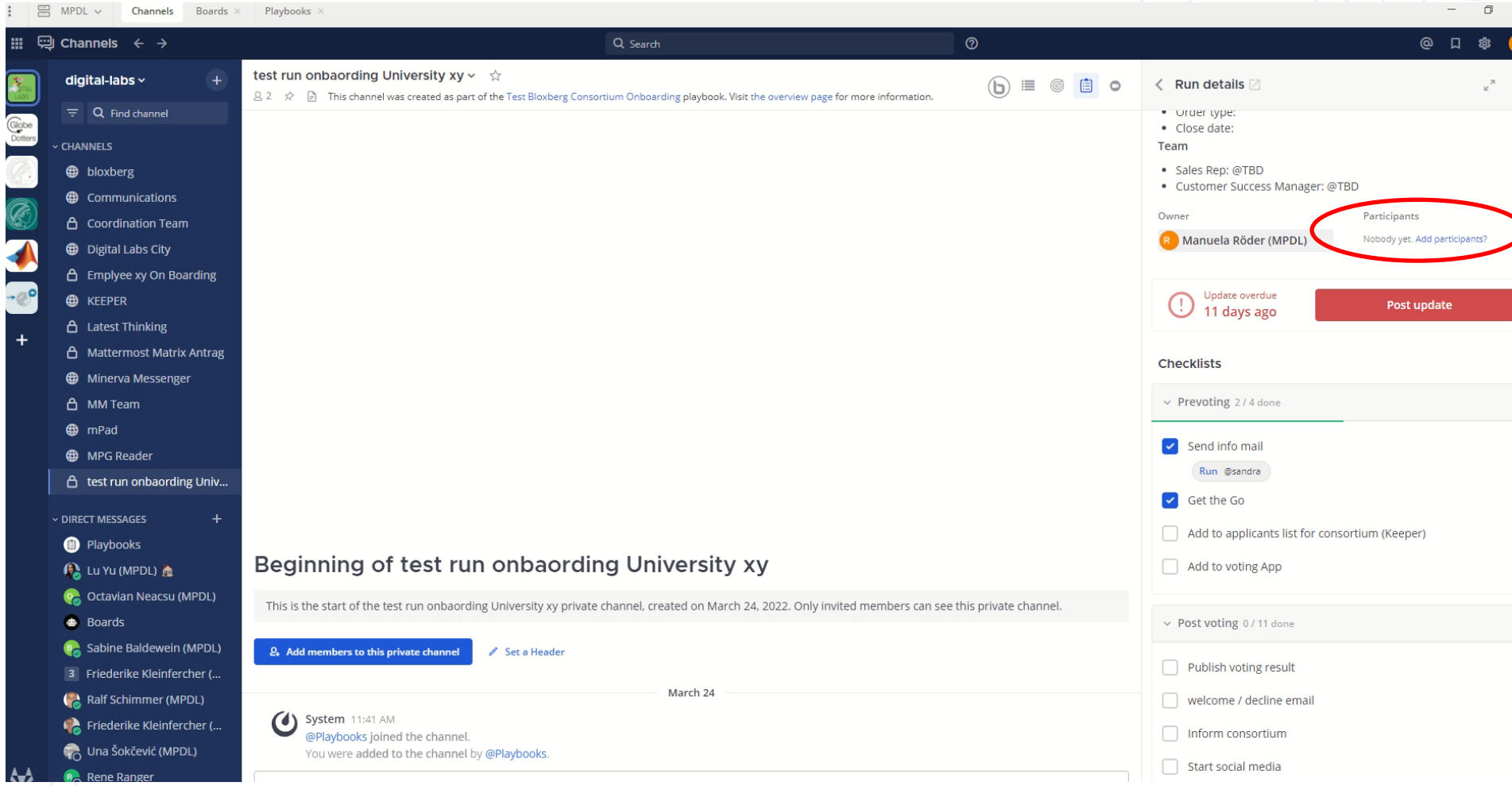


- You can see the team, for which a Playbook was created



Playbooks – What else is important

- Tasks / actions can only be assigned to owners, when you have started a run



Playbooks – conclusion

Plus / What´s in?

- In Minerva Messenger integrated **process / workflow management functionality**
- Based on existing **Team structure**
- Tool to manage **repeatable processes,** e.g. Employee On Boarding, (Slack) Migration to MM, Customer On Boarding, Product Releases, Service Upgrades…

Minus in usability / Bugs / Features not yet available

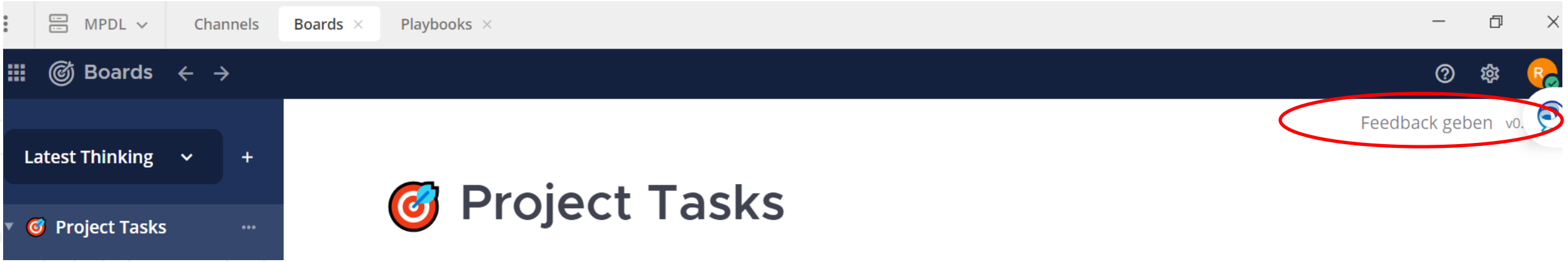
- Playbooks can only be archived, not deleted (archived Playbooks are not visible*)
- You **cannot assign tasks already in Playbooks**, only when you start a run
- With our Minerva Messenger account **private Playbooks are officially not offered**; it is a bug* that we see the option to select
- If you cannot access / see Playbooks, Boards you need to go to menu in the upper left hand side corner, go to „view“ and then click „clear cache and reload“; should be fixed in the future

*Version 6.3.3

Thank you

Link to Mattermost guide: https://docs.mattermost.com/guides/boards.html

Minerva Messenger Support team: minervamessenger@mpdl.mpg.de

Minerva Messenger Knowledge Base: https://kb.minervamessenger.mpdl.mpg.de/

Feedback to Mattermost regarding Boards beta version: