

Minerva Messenger

Boards and Playbooks
v.3. 05.04.2022



MAX PLANCK
digital library

Agenda

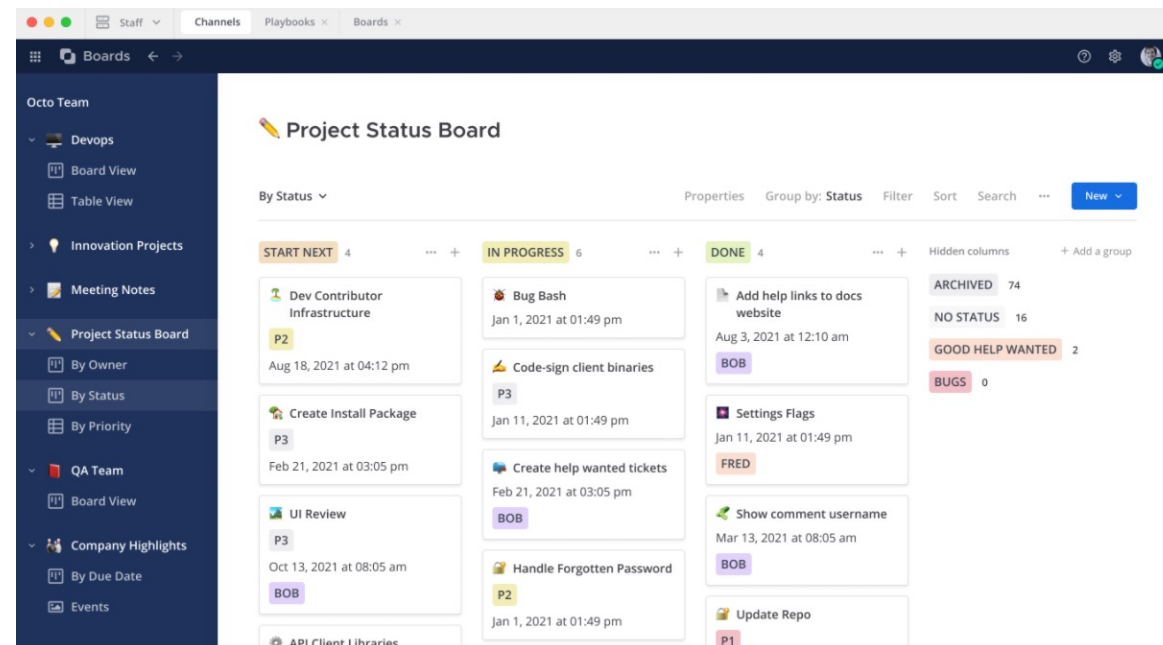
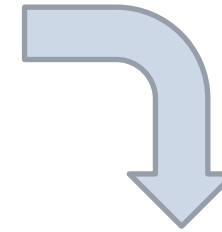
Introduction of new Mattermost features / project management functions:

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

Boards – in brief

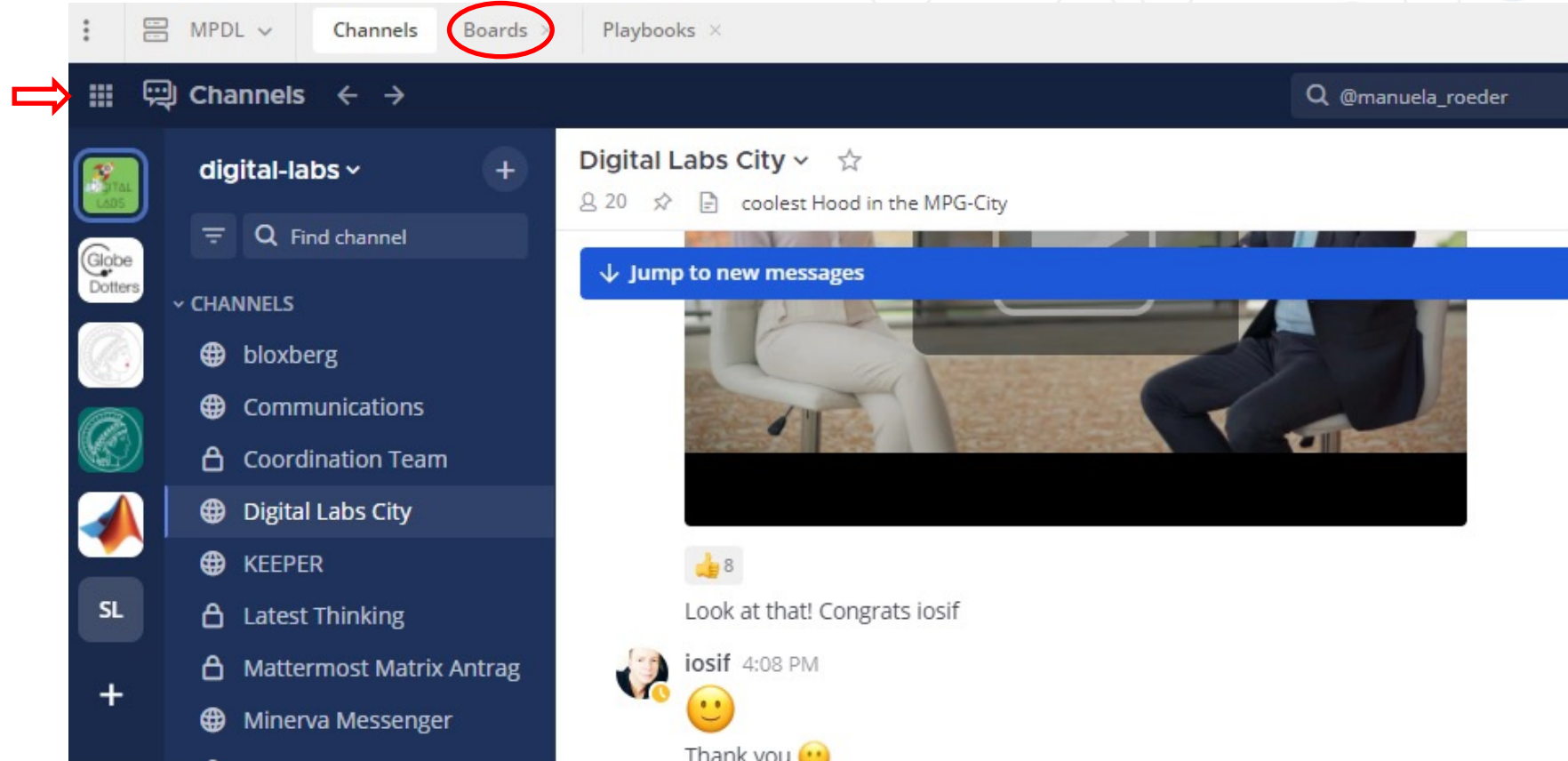
Boards help ...

- 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



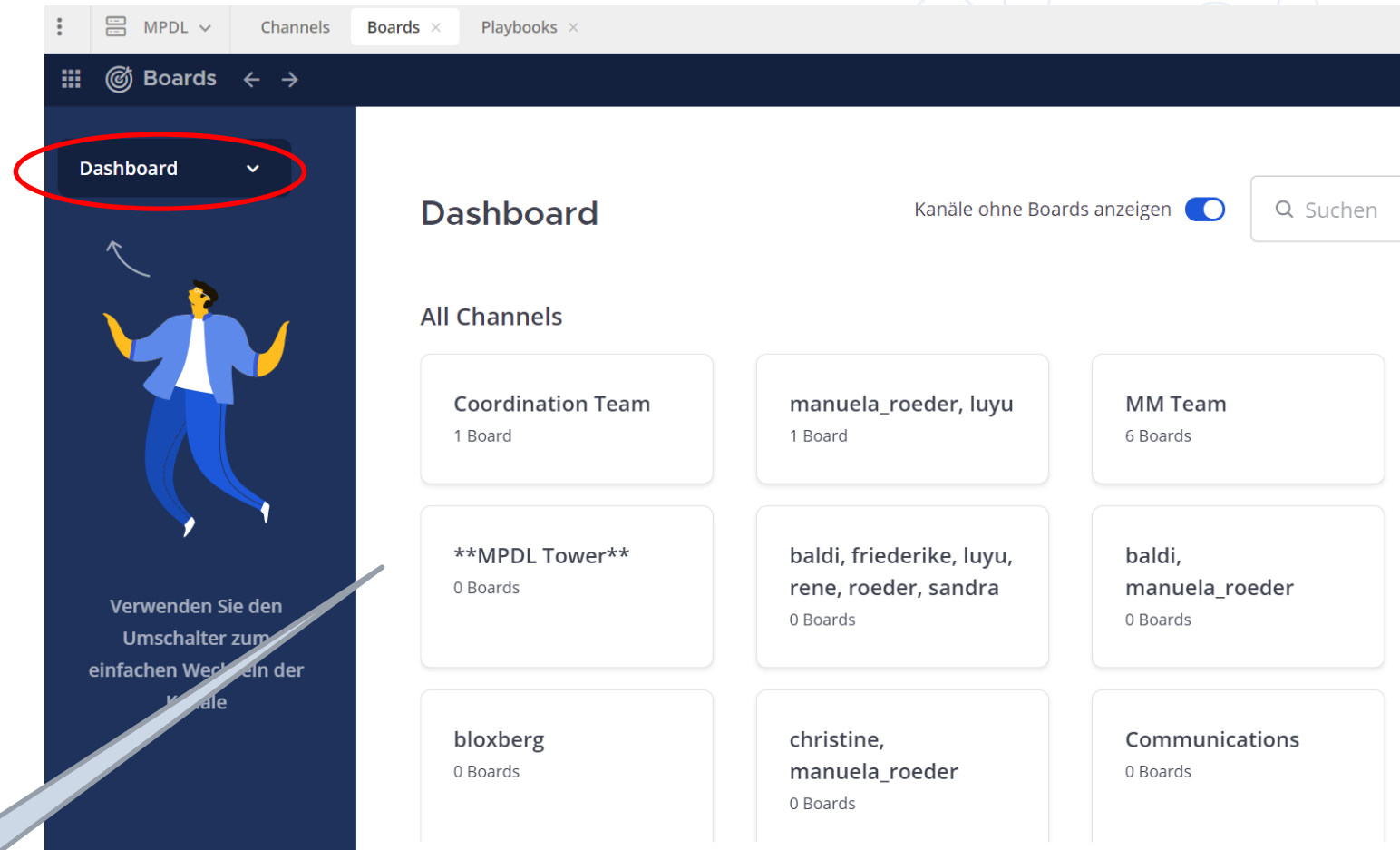
*the video is from Desktop Client, where two access ways are possible; if you like to access Boards via the browser you need to click the symbol at the left of the screen

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

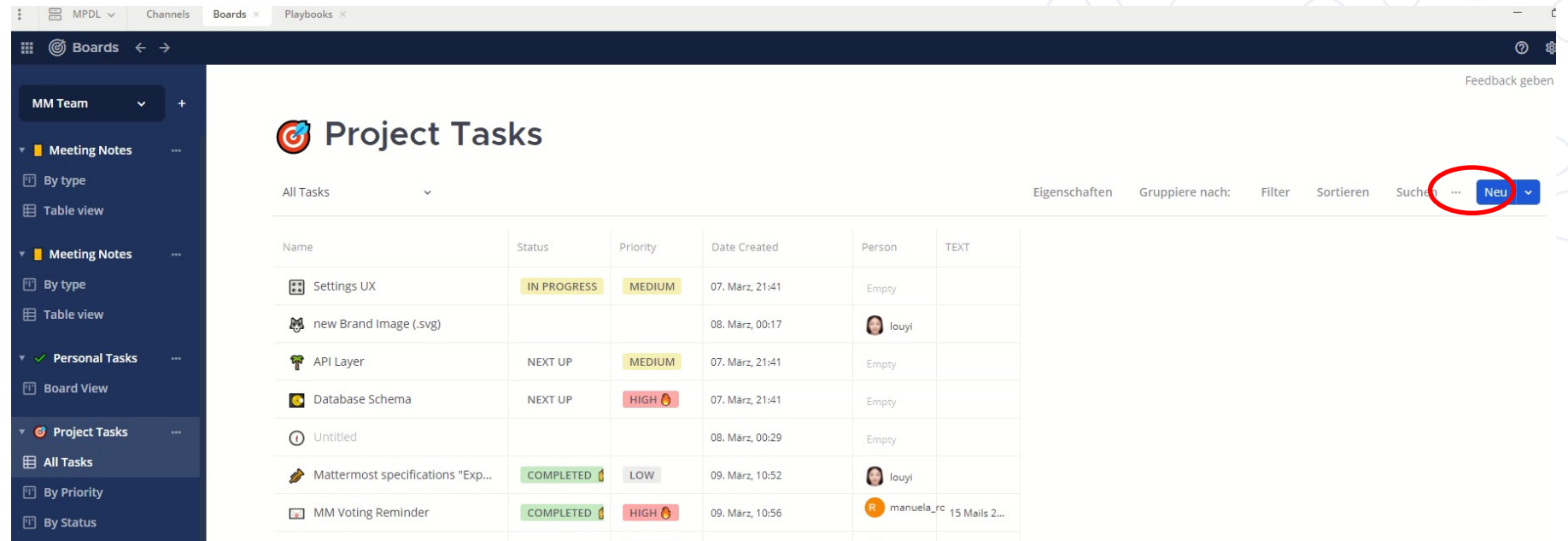
1. **Who** should have access? Which access rights? Private vs. public Channels? Direct Messaging / Chat?



Select

Boards – share link

➤ Send “read only link” for Board or Card



Project Tasks

All Tasks

Eigenschaften Gruppieren nach: Filter Sortieren Suchen **Neu**

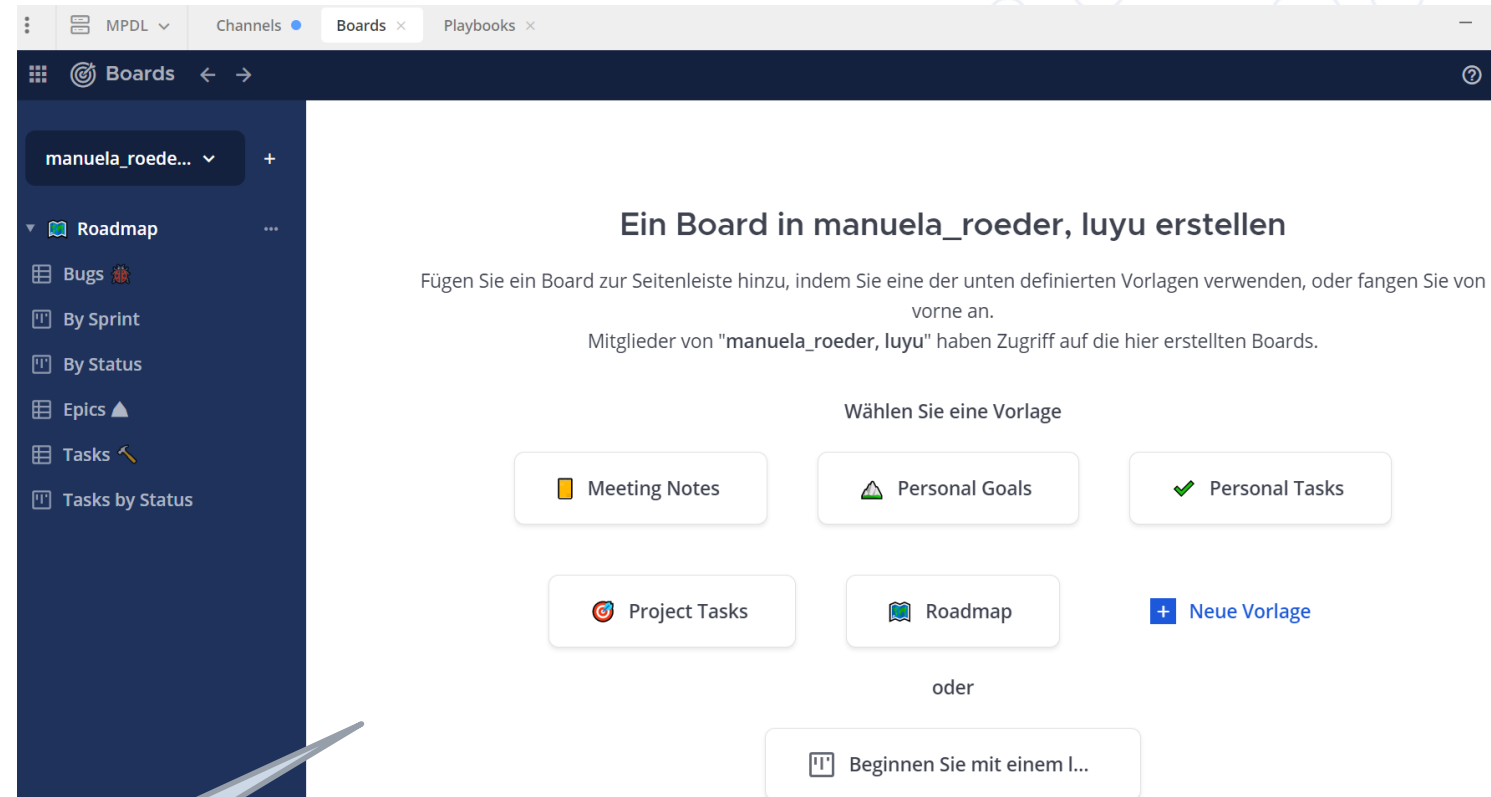
Name	Status	Priority	Date Created	Person	TEXT
Settings UX	IN PROGRESS	MEDIUM	07. März, 21:41	Empty	
new Brand Image (.svg)			08. März, 00:17	louyi	
API Layer	NEXT UP	MEDIUM	07. März, 21:41	Empty	
Database Schema	NEXT UP	HIGH	07. März, 21:41	Empty	
Untitled			08. März, 00:29	Empty	
Mattermost specifications "Exp...	COMPLETED	LOW	09. März, 10:52	louyi	
MM Voting Reminder	COMPLETED	HIGH	09. März, 10:56	manuela_rc	15 Mails 2...

Boards – how to start

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

- Select template, customize template or create completely new template

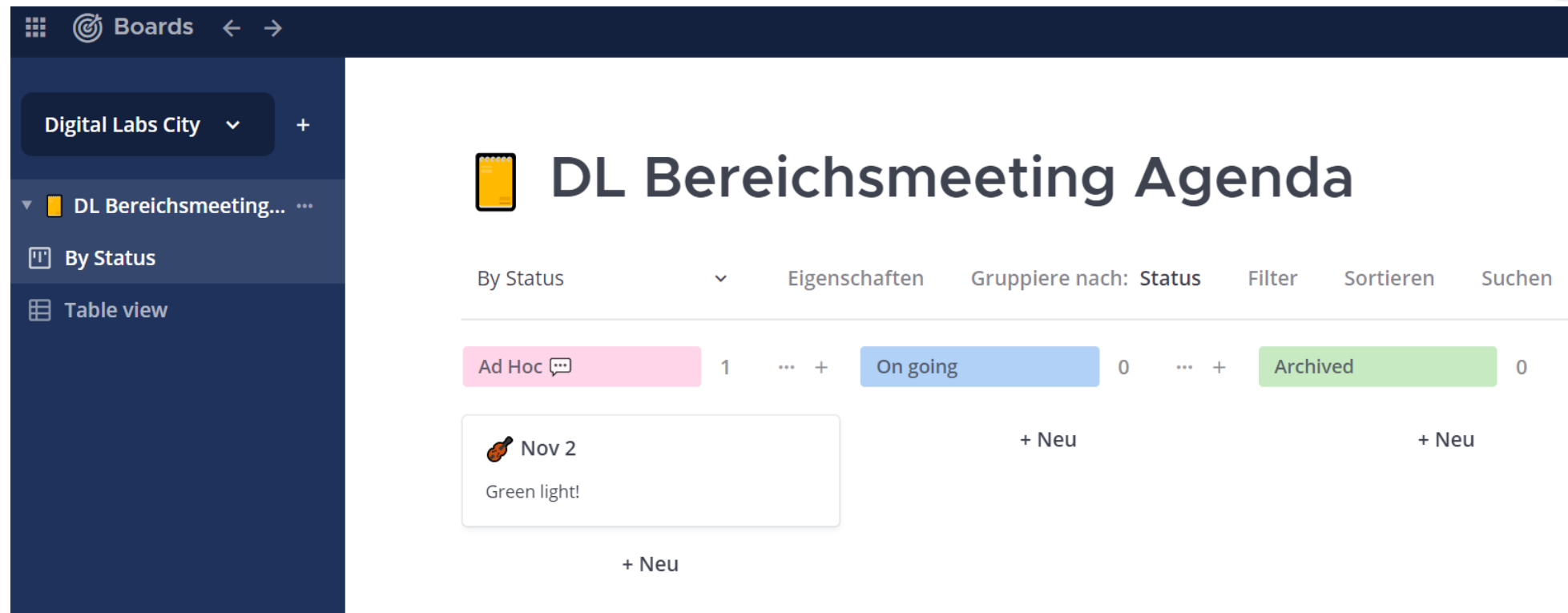
Select



Boards – how to start

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

Different examples: Meeting Notes

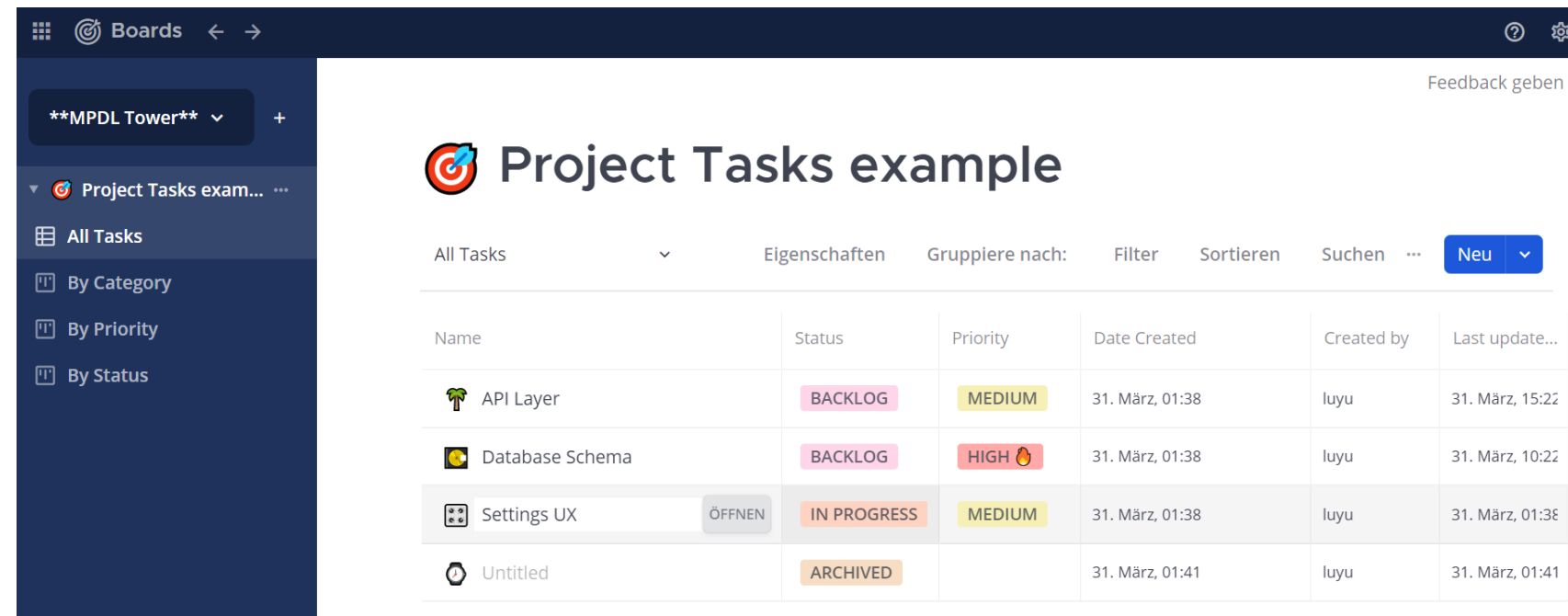


The screenshot shows the Boards application interface. The top navigation bar includes a grid icon, a target icon, and the text "Boards" with left and right arrow icons. The left sidebar contains a dropdown menu with "Digital Labs City" and a plus icon, followed by "DL Bereichsmeeting..." with a plus icon. Below this are two view options: "By Status" (selected) and "Table view". The main content area displays a board titled "DL Bereichsmeeting Agenda" with a yellow notepad icon. Below the title, there are filters: "By Status" (dropdown), "Eigenschaften", "Gruppieren nach: Status", "Filter", "Sortieren", and "Suchen". The board shows three status categories: "Ad Hoc" (pink) with 1 item, "On going" (blue) with 0 items, and "Archived" (green) with 0 items. Each category has a plus icon for adding new items. Below the "Ad Hoc" category, there is a card for "Nov 2" with the text "Green light!" and a plus icon for adding new items.

Boards – how to start






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

Different examples: **Project Tasks; edited template***



Project Tasks example

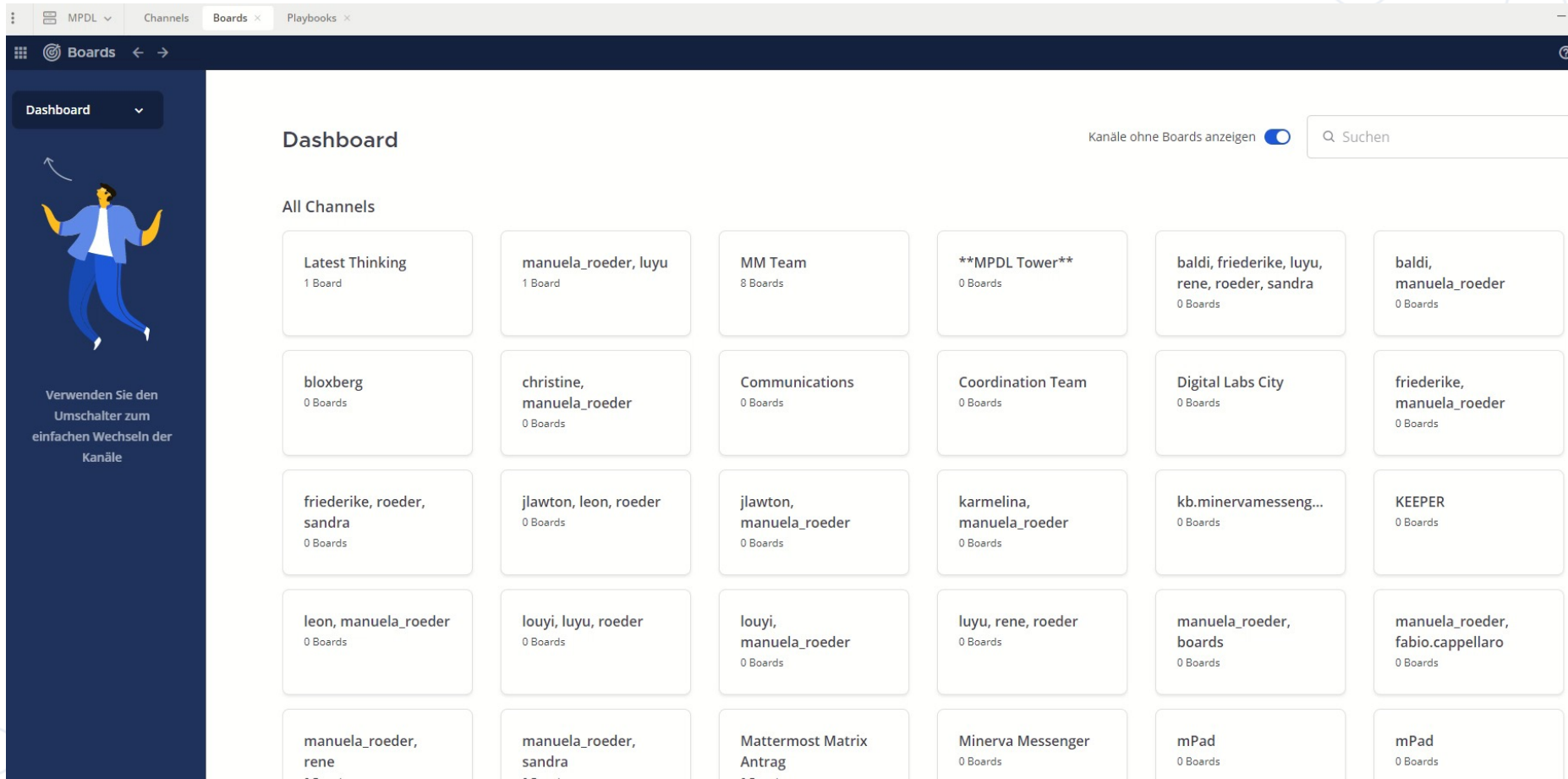
All Tasks | Eigenschaften | Gruppiere nach: | Filter | Sortieren | Suchen | Neu

Name	Status	Priority	Date Created	Created by	Last update...
 API Layer	BACKLOG	MEDIUM	31. März, 01:38	luyu	31. März, 15:22
 Database Schema	BACKLOG	HIGH 	31. März, 01:38	luyu	31. März, 10:22
 Settings UX ÖFFNEN	IN PROGRESS	MEDIUM	31. März, 01:38	luyu	31. März, 01:38
 Untitled	ARCHIVED		31. März, 01:41	luyu	31. März, 01:41

*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







The screenshot shows the 'Boards' dashboard in a web application. The top navigation bar includes 'MPDL', 'Channels', 'Boards', and 'Playbooks'. The left sidebar has a 'Dashboard' dropdown and an illustration of a person with the text: 'Verwenden Sie den Umschalter zum einfachen Wechseln der Kanäle'. The main area is titled 'Dashboard' and features a toggle for 'Kanäle ohne Boards anzeigen' and a search bar labeled 'Suchen'. Below this is a grid of 24 channel cards, each showing a name and the number of boards it contains.

Channel Name	Number of Boards
Latest Thinking	1 Board
manuela_roeder, luyu	1 Board
MM Team	8 Boards
MPDL Tower	0 Boards
baldi, friederike, luyu, rene, roeder, sandra	0 Boards
baldi, manuela_roeder	0 Boards
bloxberg	0 Boards
christine, manuela_roeder	0 Boards
Communications	0 Boards
Coordination Team	0 Boards
Digital Labs City	0 Boards
friederike, manuela_roeder	0 Boards
friederike, roeder, sandra	0 Boards
jlawton, leon, roeder	0 Boards
jlawton, manuela_roeder	0 Boards
karmelina, manuela_roeder	0 Boards
kb.minervamesseng...	0 Boards
KEEPER	0 Boards
leon, manuela_roeder	0 Boards
louyi, luyu, roeder	0 Boards
louyi, manuela_roeder	0 Boards
luyu, rene, roeder	0 Boards
manuela_roeder, boards	0 Boards
manuela_roeder, fabio.cappellaro	0 Boards
manuela_roeder, rene	0 Boards
manuela_roeder, sandra	0 Boards
Mattermost Matrix Antrag	0 Boards
Minerva Messenger	0 Boards
mPad	0 Boards
mPad	0 Boards


Boards – features I

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

→  **Roadmap**

 Zufällig
 Symbol auswählen ▶
 Symbol entfernen

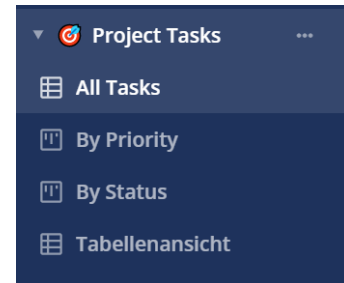
Eigenschaften Gruppieren nach

Name	Status	Type
Icons don't display	NOT START	BUG 

+ Neu

Boards – features II

- Different views



MPDL Channels Boards Playbooks

MM Team +

Project Tasks ...

All Tasks

By Priority

By Status

Tabellenansicht

Project Tasks

All Tasks

Eigenschaften Gruppieren nach: Filter Sortieren Suchen ... Neu



Name	Status	Priority	Date Created	Person	TEXT
Settings UX	IN PROGRESS	MEDIUM	07. März, 21:41	Empty	
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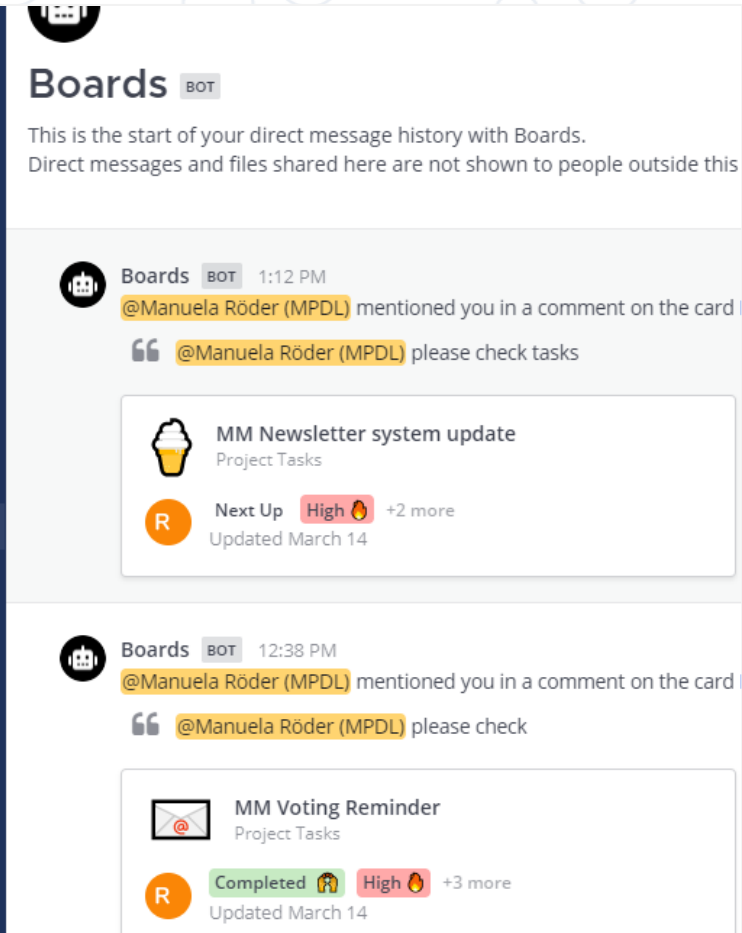
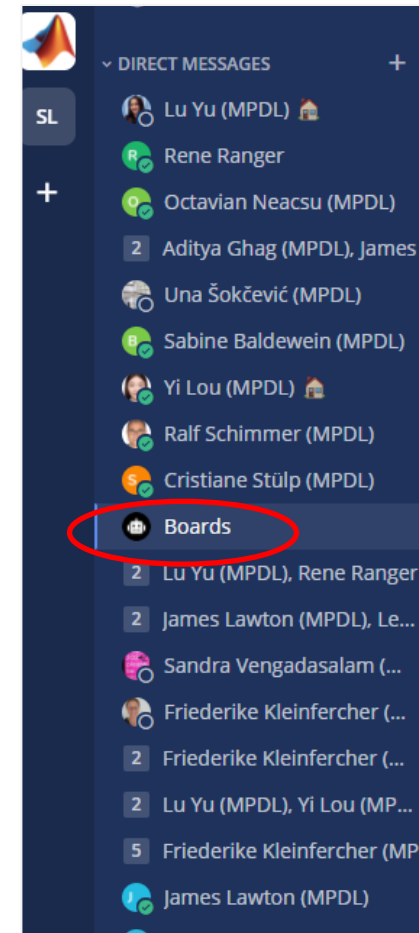
Boards – features II

Notifications:

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

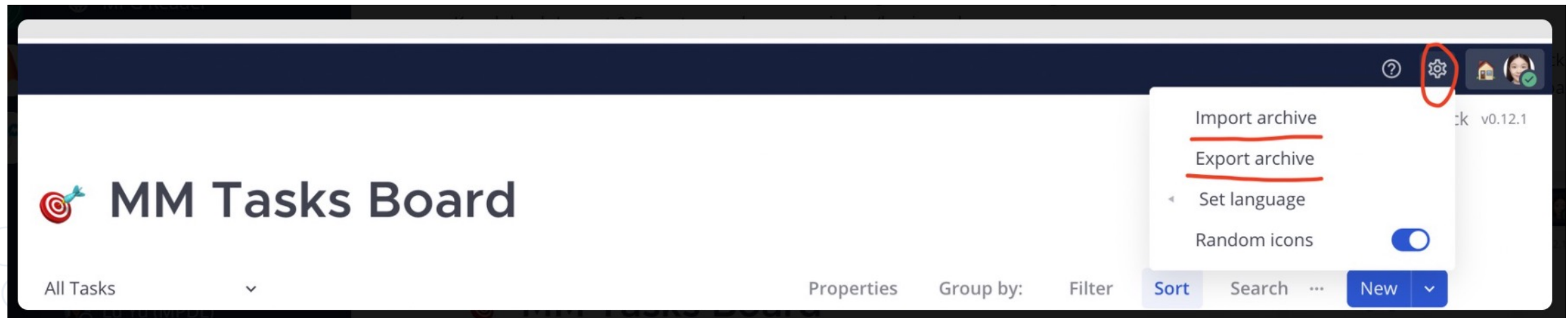
MM Voting Reminder

Status	COMPLETED 🏆
Priority	HIGH 🔥
Date Created	09. März, 10:56
Person	 manuela_roeder
TEXT	15 Mails 24.2 to key users; 25 Mails sent to further Soli Contacts and MM users 9.3.
+ Eigenschaft hinzufügen	
 @manuela_roeder please check	
Abschicken	



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.

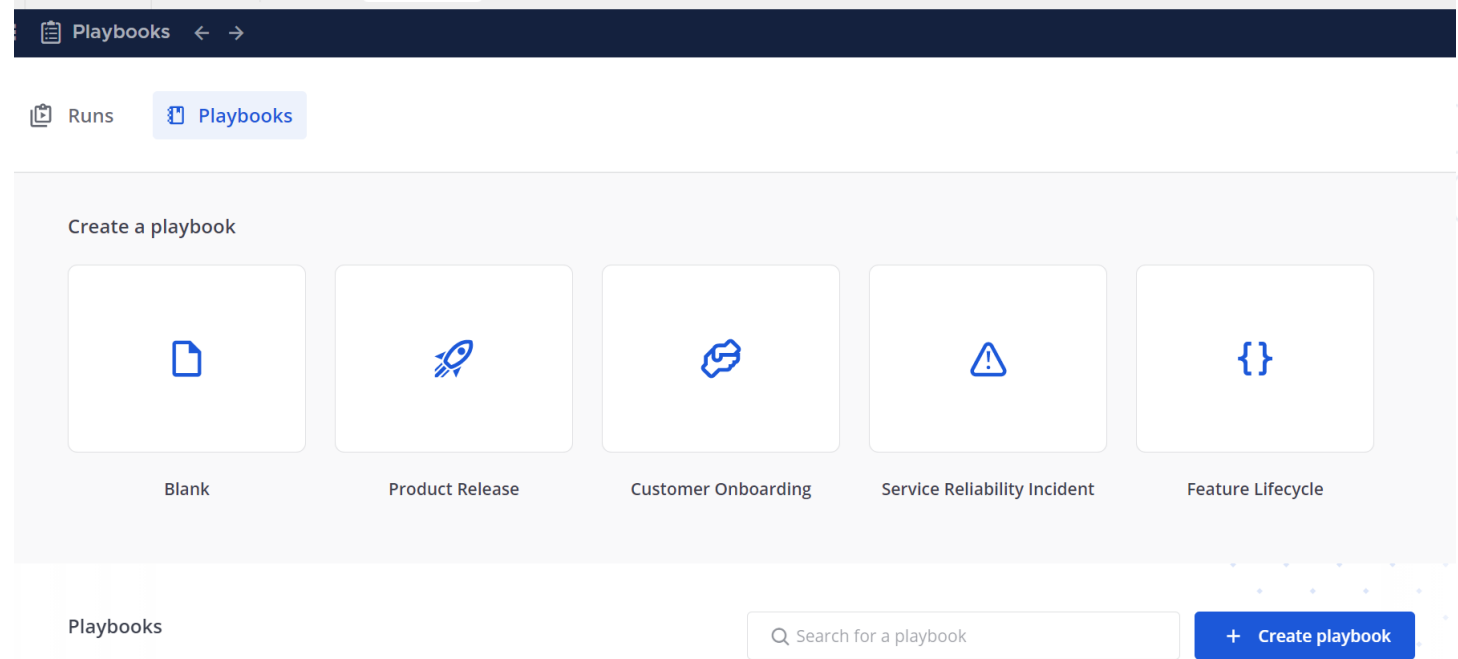
Agenda

Introduction of new Mattermost features / project management functions:

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

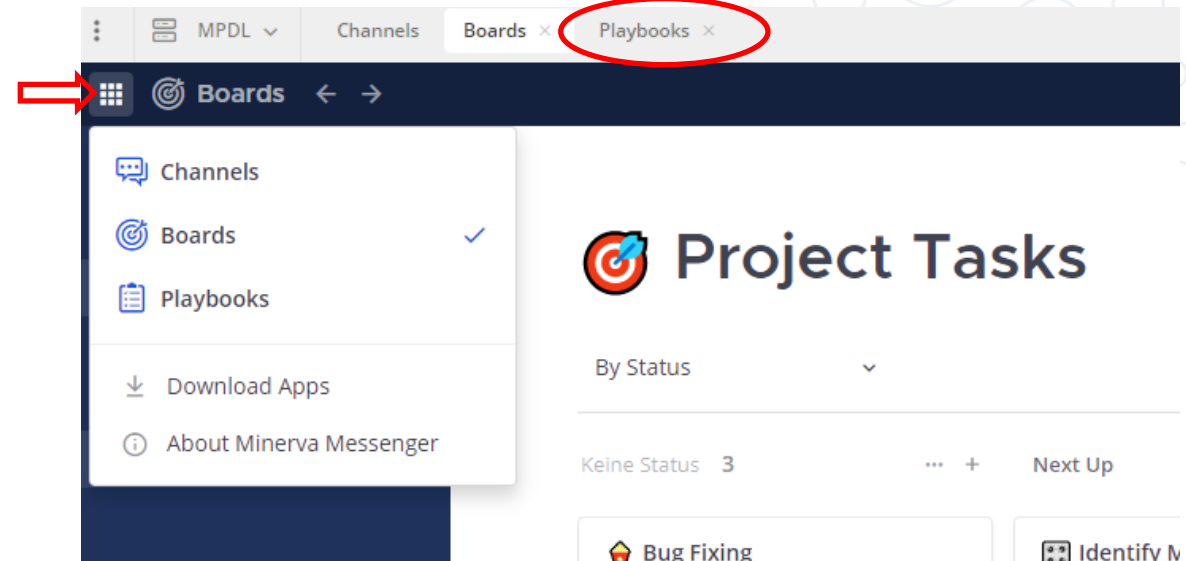
Playbooks – in brief

- 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

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



*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

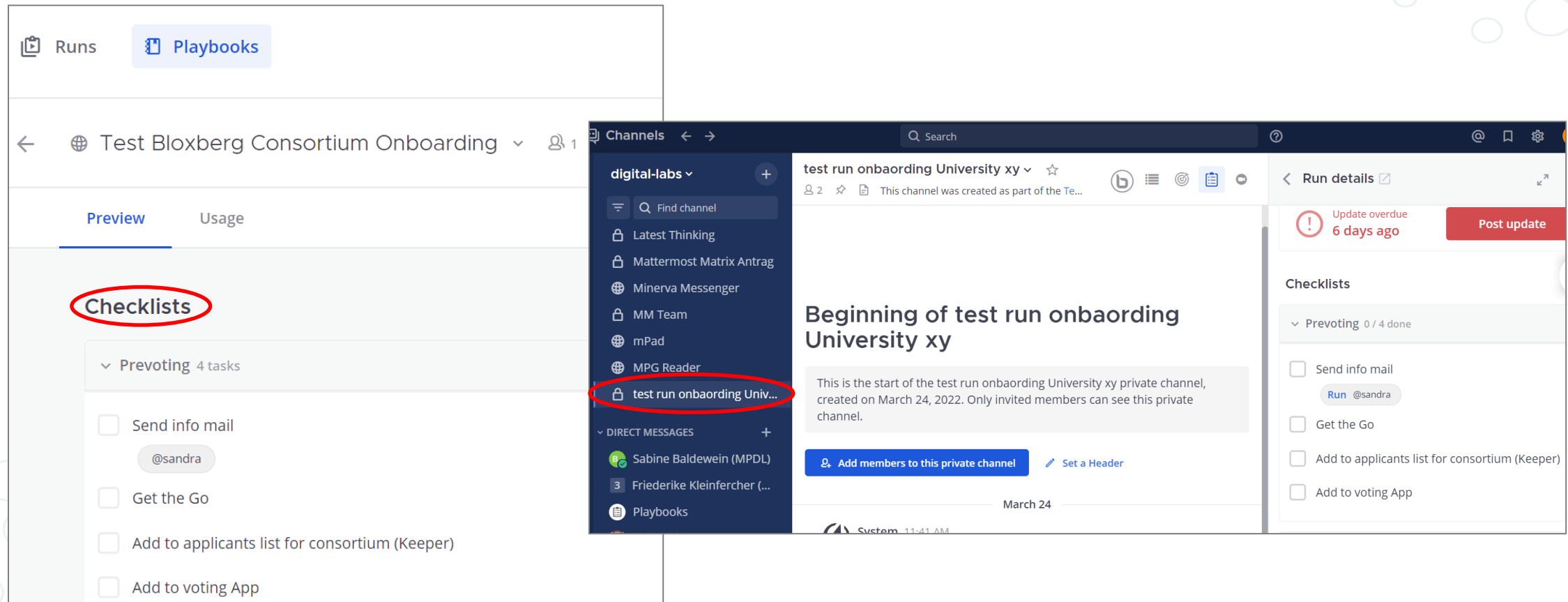
- Generally Playbooks uses “**team-based**” permission.
- MinervaMessenger user generally can only create **public**

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**):



The screenshot displays the digital-labs interface, divided into two main sections: Playbooks and Runs.

Playbooks Section (Left):

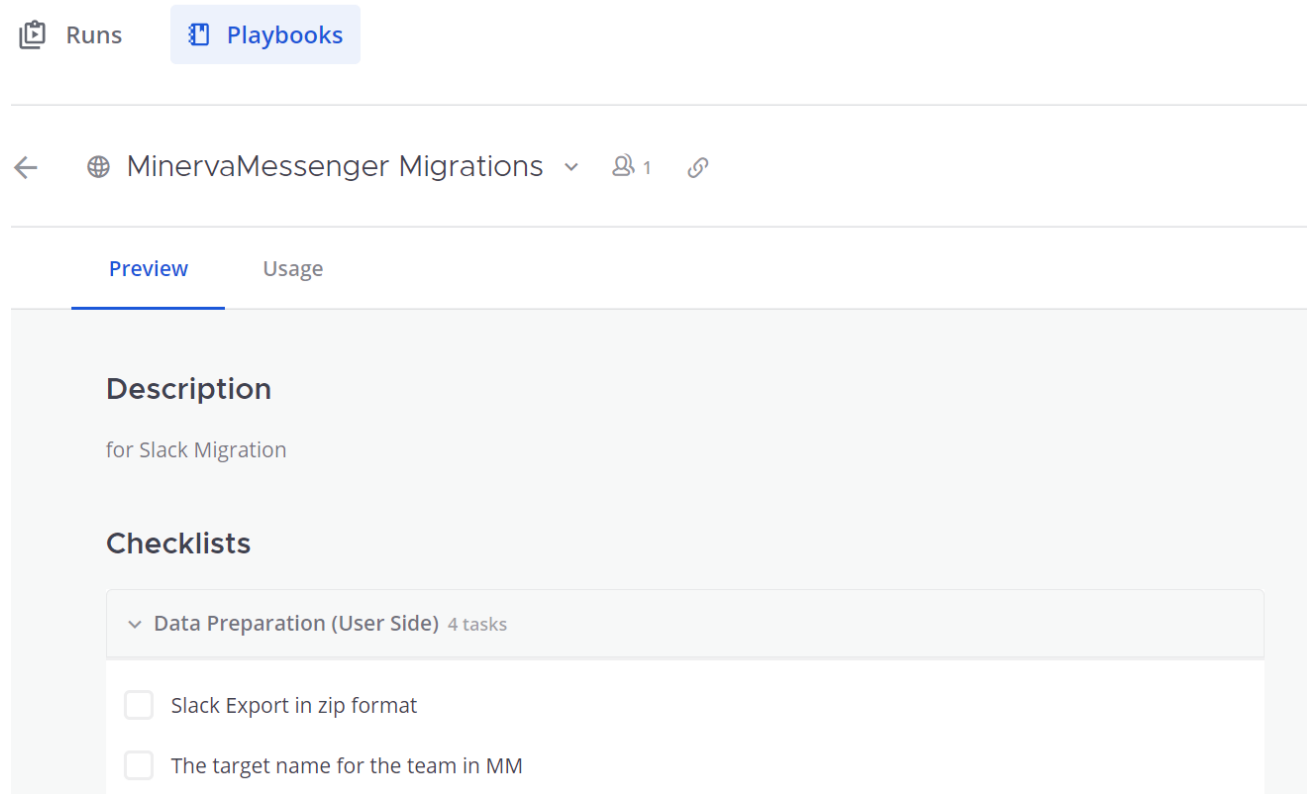
- At the top, there are tabs for "Runs" and "Playbooks".
- Below the tabs, the channel "Test Bloxberg Consortium Onboarding" is selected.
- The "Preview" tab is active, showing a checklist titled "Checklists" (circled in red).
- The checklist is titled "Prevoting 4 tasks" and includes the following items:
 - ☐ Send info mail (with a button "@sandra")
 - ☐ Get the Go
 - ☐ Add to applicants list for consortium (Keeper)
 - ☐ Add to voting App

Runs Section (Right):

- The "Channels" sidebar on the left lists various channels, with "test run onboarding Univ..." (circled in red) selected.
- The main content area shows the "test run onboarding University xy" channel details.
- The channel description states: "Beginning of test run onboarding University xy. This is the start of the test run onboarding University xy private channel, created on March 24, 2022. Only invited members can see this private channel."
- Buttons for "Add members to this private channel" and "Set a Header" are visible.
- The date "March 24" is displayed at the bottom of the channel details.
- On the right, the "Run details" panel shows:
 - A red warning icon and text: "Update overdue 6 days ago" with a "Post update" button.
 - A section titled "Checklists" with a dropdown "Prevoting 0 / 4 done".
 - A checklist with the same items as the Playbooks section:
 - ☐ Send info mail (with a button "Run @sandra")
 - ☐ Get the Go
 - ☐ Add to applicants list for consortium (Keeper)
 - ☐ Add to voting App

Playbooks – how to start

- Examples of Playbooks and Runs:
Minerva Messenger Slack Migration



The screenshot shows a web interface for managing playbooks. At the top, there are two tabs: 'Runs' and 'Playbooks', with 'Playbooks' being the active tab. Below the tabs, there is a breadcrumb navigation bar showing a back arrow, a globe icon, the text 'MinervaMessenger Migrations', a dropdown arrow, a user icon with the number '1', and a link icon. Below the breadcrumb, there are two sub-tabs: 'Preview' (which is active) and 'Usage'. The main content area under the 'Preview' tab is divided into two sections. The first section is titled 'Description' and contains the text 'for Slack Migration'. The second section is titled 'Checklists' and contains a collapsible list item 'Data Preparation (User Side) 4 tasks'. This list item is expanded, showing two checklist items: 'Slack Export in zip format' and 'The target name for the team in MM', each with an unchecked checkbox.

Runs Playbooks

← MinervaMessenger Migrations 1

Preview Usage

Description

for Slack Migration

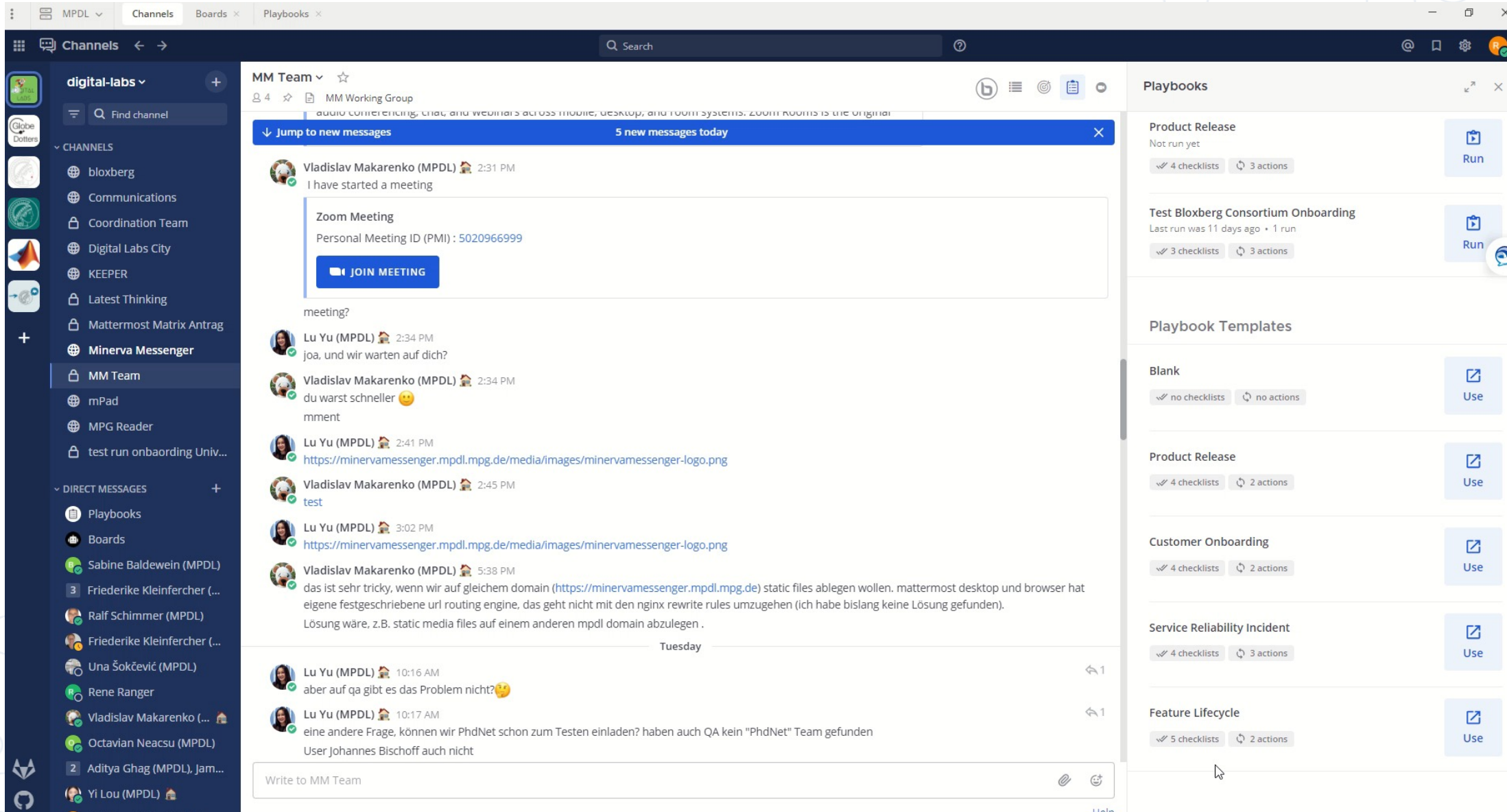
Checklists

▼ Data Preparation (User Side) 4 tasks

- ☐ Slack Export in zip format
- ☐ The target name for the team in MM

Example Employee on boarding

Playbooks – how to start



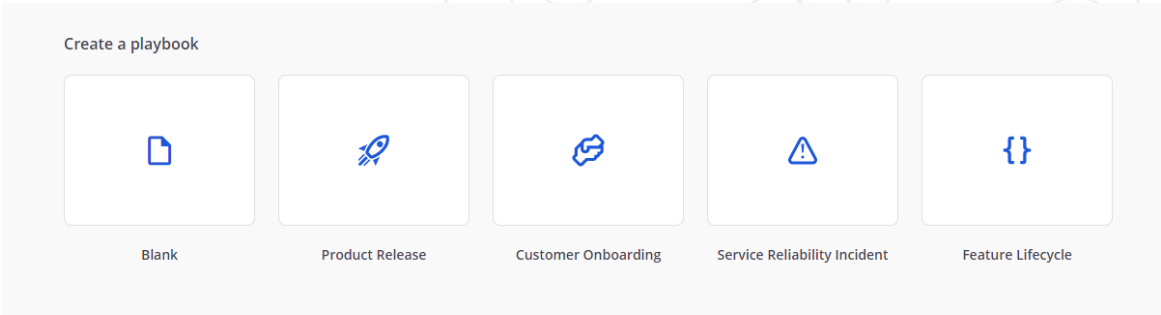
The screenshot displays the Minerva Messenger application interface. On the left, a sidebar shows the 'Channels' list, including 'digital-labs', 'bloxberg', 'Communications', 'Coordination Team', 'Digital Labs City', 'KEEPER', 'Latest Thinking', 'Mattermost Matrix Antrag', 'Minerva Messenger', 'MM Team', 'mPad', 'MPG Reader', and 'test run onbaording Univ...'. Below this, 'DIRECT MESSAGES' are listed with names like Sabine Baldewein, Friederike Kleinfischer, Ralf Schimmer, Una Šokčević, Rene Ranger, Vladislav Makarenko, Octavian Neacsu, Aditya Ghag, and Yi Lou.

The main chat window is titled 'MM Team' and shows a conversation with 4 members. The chat history includes messages from Vladislav Makarenko (MPDL) about starting a meeting, Lu Yu (MPDL) asking for a meeting, and Vladislav Makarenko (MPDL) providing a Zoom Meeting link. The chat also shows a message from Lu Yu (MPDL) about a problem with static files and a message from Lu Yu (MPDL) about a question regarding PhdNet.

On the right, the 'Playbooks' sidebar is visible, showing a list of playbooks and their templates. The playbooks listed are 'Product Release', 'Test Bloxberg Consortium Onboarding', 'Blank', 'Product Release', 'Customer Onboarding', 'Service Reliability Incident', and 'Feature Lifecycle'. Each playbook has a 'Run' button and a 'Use' button. The 'Product Release' playbook is highlighted, showing it has 4 checklists and 3 actions.

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



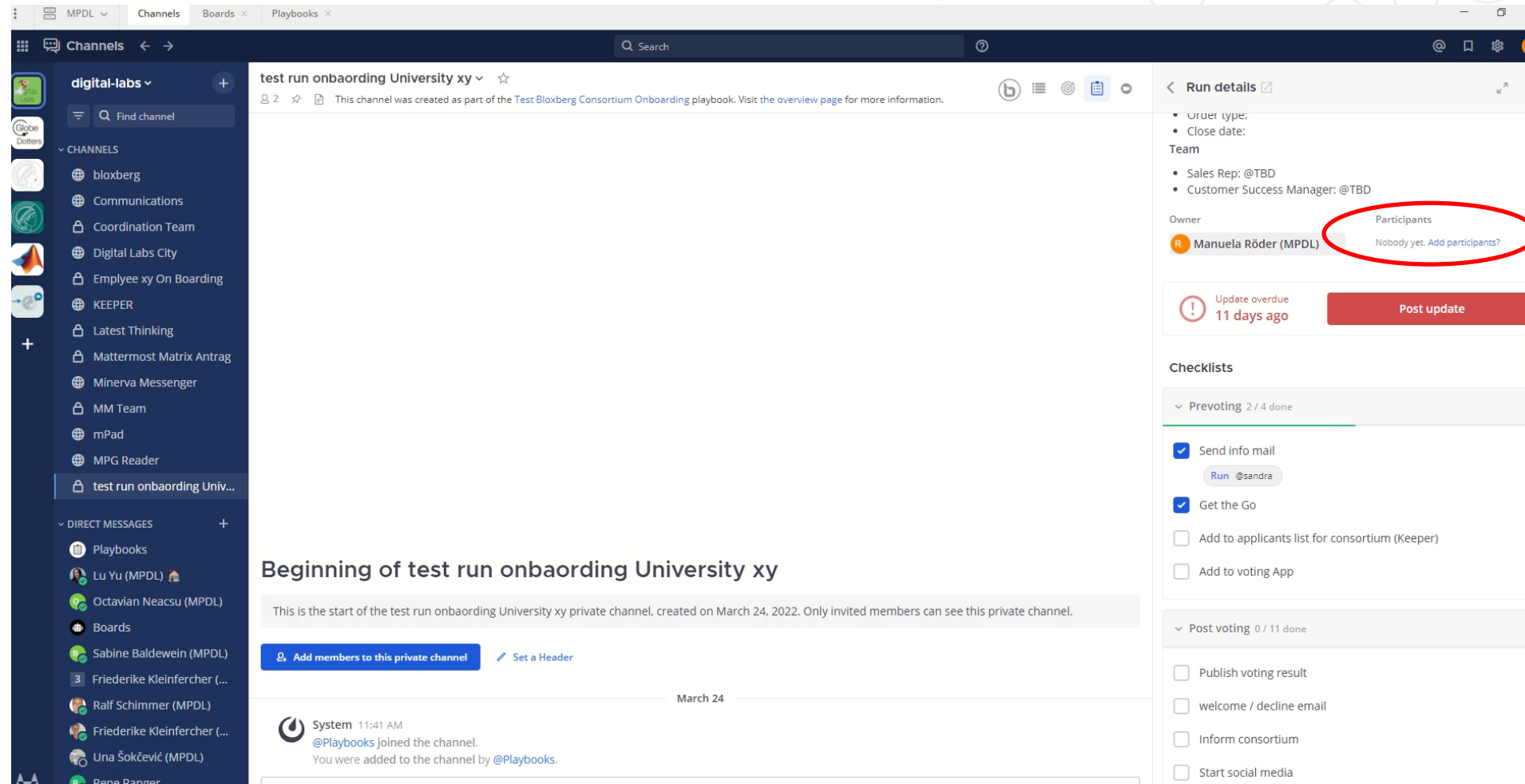
Playbooks [+ Create playbook](#)

Playbooks

Name ^	Checklists	Tasks	Runs
CRISPR external collaborations MPG	1	1	1
Employee On Boarding digital-labs	1	4	1
MinervaMessenger Migrations MPDL	6	12	4
Product Release digital-labs	4	20	0
Slack Migration Slack Import	6	12	6

Playbooks – What else is important

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



The screenshot shows the digital-labs interface. On the left is a sidebar with a search bar and lists of channels and direct messages. The main area displays a channel titled 'test run onboarding University xy'. Below the title, it says 'Beginning of test run onboarding University xy' and provides context about the channel's creation. A system message indicates that the user has joined the channel. On the right, the 'Run details' panel is visible, showing information like 'Order type', 'Close date', 'Team', 'Sales Rep', and 'Customer Success Manager'. A red circle highlights the 'Participants' section, which currently shows 'Nobody yet. Add participants?'. Below this, there's a 'Checklists' section with tasks like 'Send info mail', 'Get the Go', 'Add to applicants list for consortium (Keeper)', and 'Add to voting App'. At the bottom of the right panel, there's a 'Post voting' section with tasks like 'Publish voting result', 'welcome / decline email', 'Inform consortium', and 'Start social media'.

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

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:

