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NHS
Informatics Merseyside

Training Guide

Teams Tasks by Planner and To Do App

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Disclaimer

Periodically changes to business processes or updates to systems or applications result in the update of training guides and materials. It is the responsibility of the delegate to check that they have the most up-to-date guides. All guides contain a Change Control table at the front which will detail when the document was updated. If you want to check if you have the correct version please email training@imerseyside.nhs.uk

Change Control

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Version	Date	Approver Name	Approver Job Title
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Hints and Tips

	This symbol suggests a tip or a good method of working for speed and efficiency
	This symbol suggests a caution or an action to be aware of
	This symbol indicates an Information Governance warning
	This symbol indicates hints and tips that support digital optimisation

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Tasks By Planner and To Do App in Microsoft Teams

Microsoft Planner and Microsoft To Do are both applications that are part of the Office 365 suite.

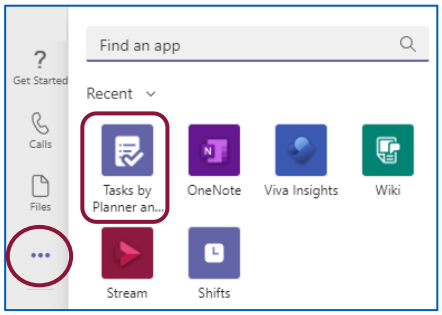
The Tasks by Planner and To Do app brings together individual tasks from To Do and group tasks from Planner into one application. The app does not have all of the functionality of the full Office 365 applications.

The Tasks app can be added as a tab to any Public Channels within Teams. It can be edited within Teams and in a web browser, via a Microsoft Online Account.

Install Tasks by Planner and To Do App

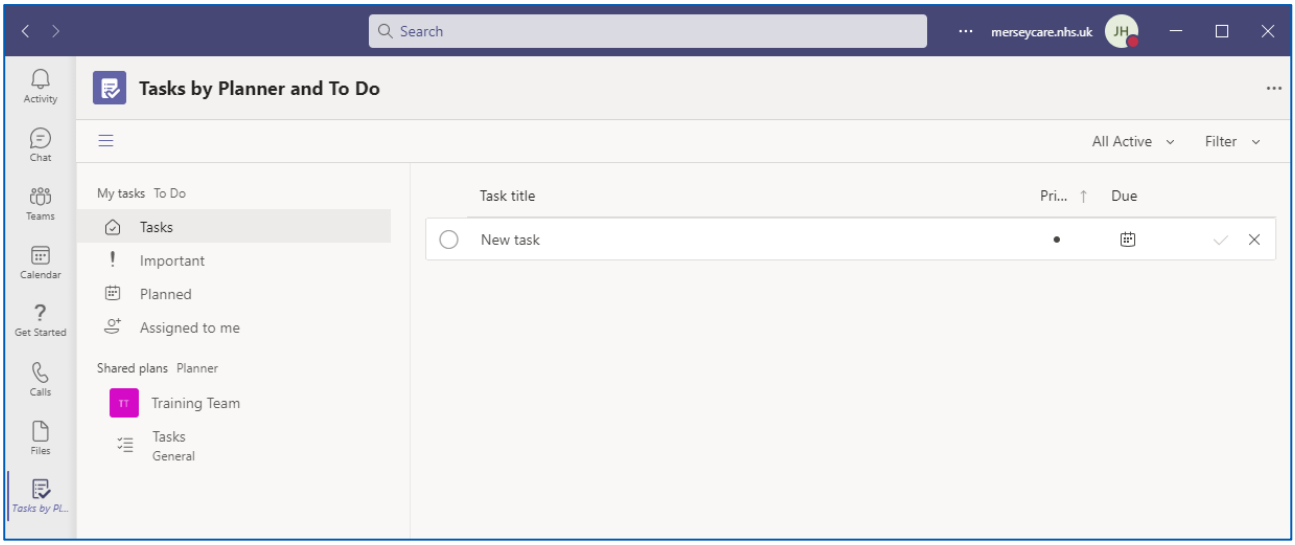
To install the Tasks by Planner app and add it to teams.

- Select the Ellipses (3 dots) on the Navigation Pane → select Tasks by Planner and To Do → click Add.



If the app doesn't appear or has not been used before, use the Search function to find it.

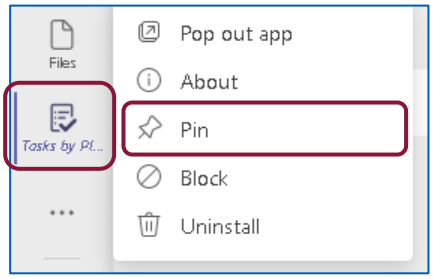
Tasks by Planner and To Do will open:



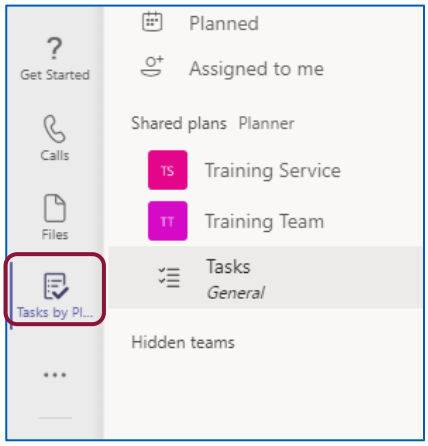
Pin to the Navigation Pane

The app can be pinned to the Navigation Pane for easy access.

- Right-click Tasks by Planner and To Do → select Pin.



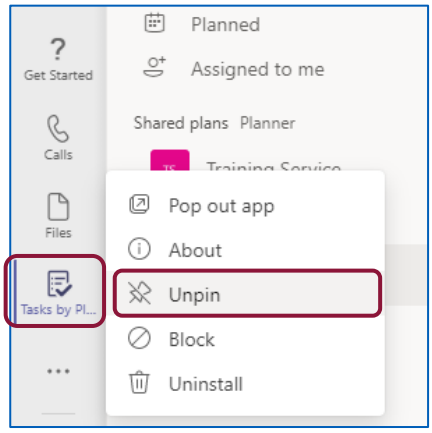
The app will be pinned to the Navigation pane.



Unpin from the Navigation Pane

If required, the app can be unpinned from the Navigation pane.

- Right-click Tasks by Planner and To Do → select Unpin.



The app will be Unpinned from the Navigation pane.

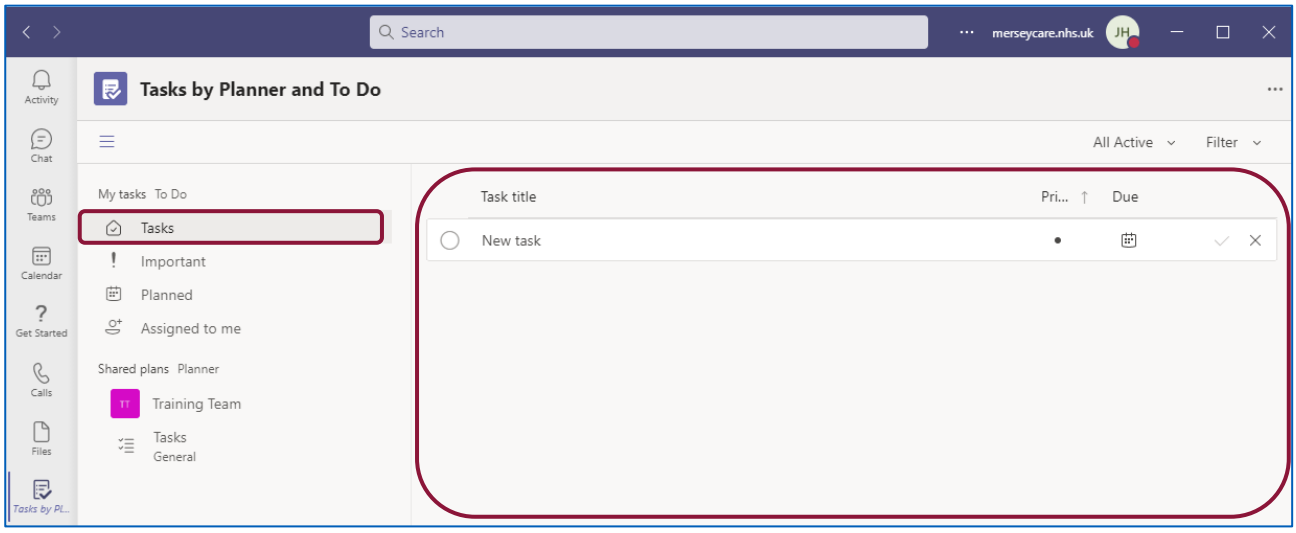
Individual User Tasks (To Do)

The My Tasks section within the app, displays tasks that are assigned to the user.

My Tasks is split up into multiple lists.

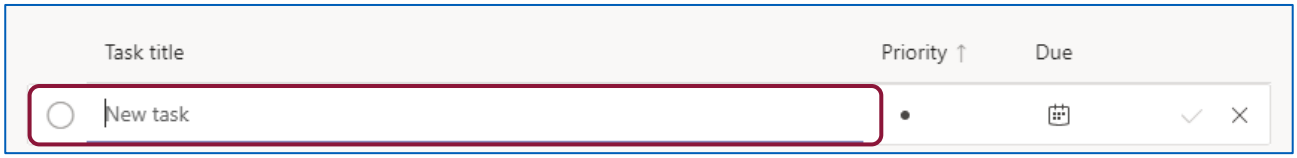
- Tasks - shows tasks that the user has set themselves.
- Important - shows tasks that are marked as high priority.
- Planned - shows tasks that have an assigned due date.
- Assigned to me - shows all tasks that have been assigned to the user from within a Teams channel and includes tasks that were set by others.

- Select a List to view the associated tasks.

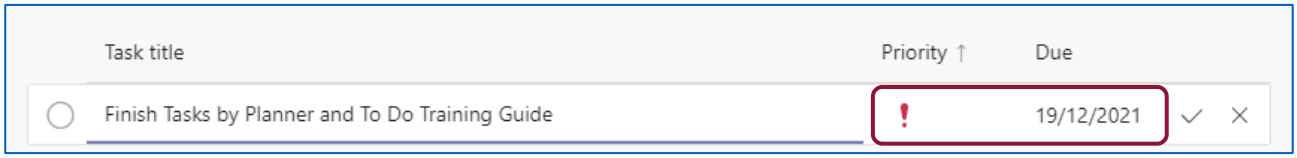


Create a New Task

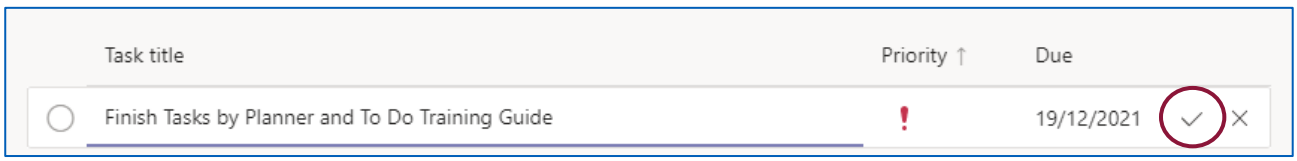
- Select New task → type in the task.



- Set the Priority and Due date as required.

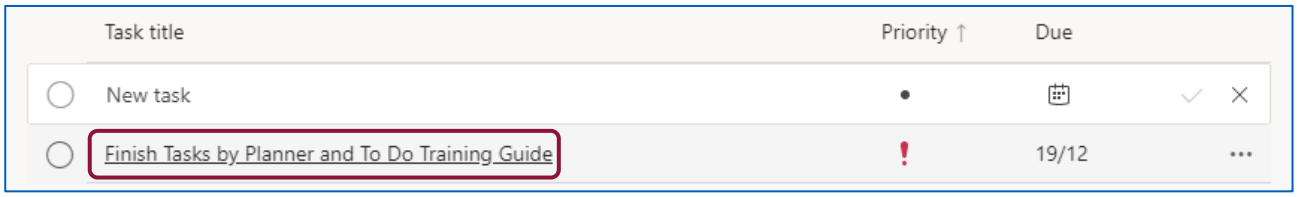


- Click the Tick icon to add the task.

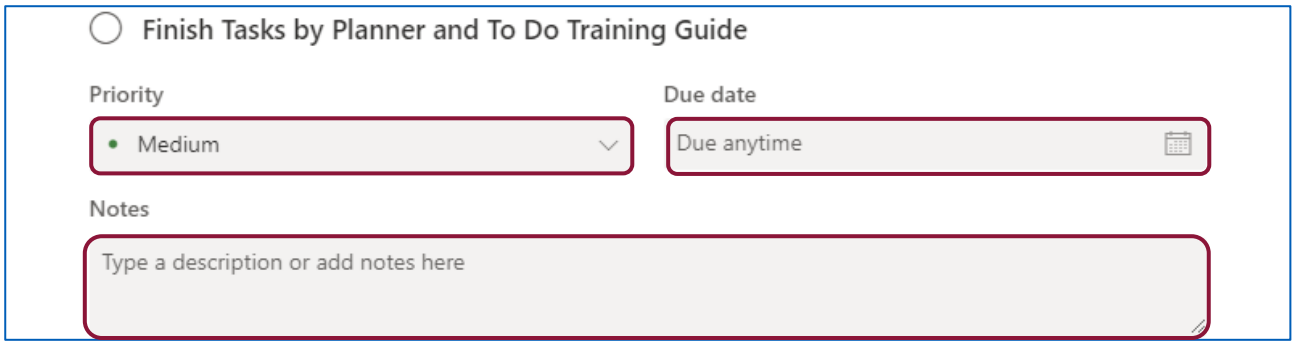


Task Properties

- Select a Task from the list to update the Task properties.



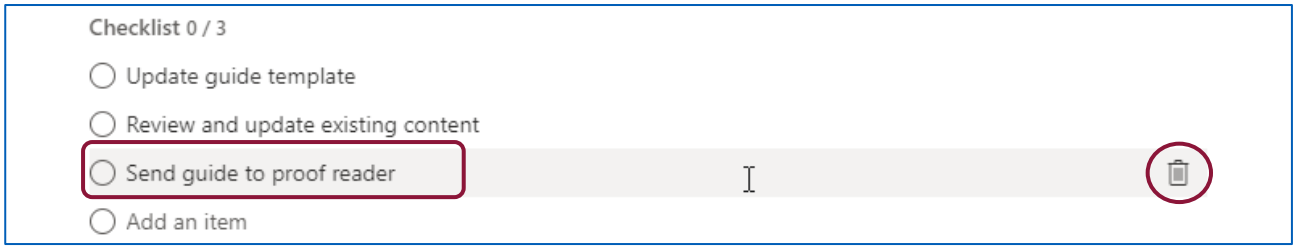
- Update / set the Priority and Due date as required.
- Type in a Description or add any Notes that relate to the task.



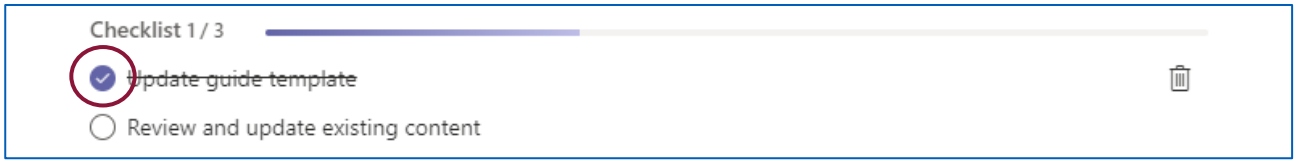
A Checklist can be used to create subtasks that need to be completed in order to achieve the main task.

- Click Add an item → type in the item → press the Enter key.
- Repeat this step to add additional items to the Checklist as required.

- Select an item's text to make changes.
- Click the Bin to remove the item from the checklist, if required.



- Click the Circle next to a checklist item to mark it as Completed.

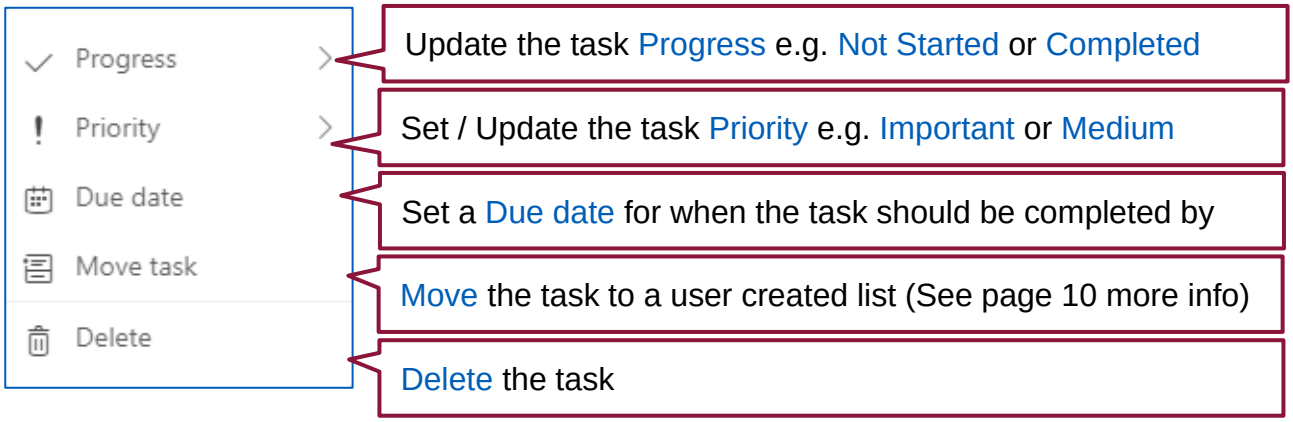


- Select X from the top-right to close the task.

Task Options

- Click the Ellipses (3 dots) to view More options for the task.

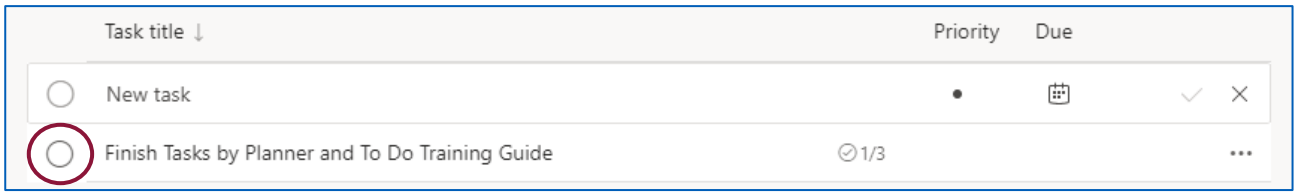
- Select the desired option from the list.



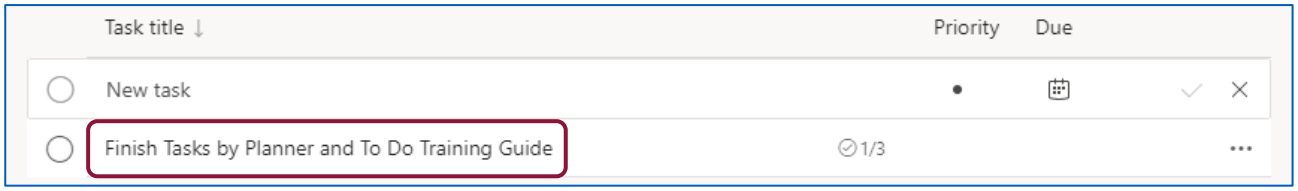
Complete a Task

There are two ways to mark a task as completed.

- Click the Circle next to the task to mark it as Completed.



- Alternatively, select the Task from the list to view Task properties.



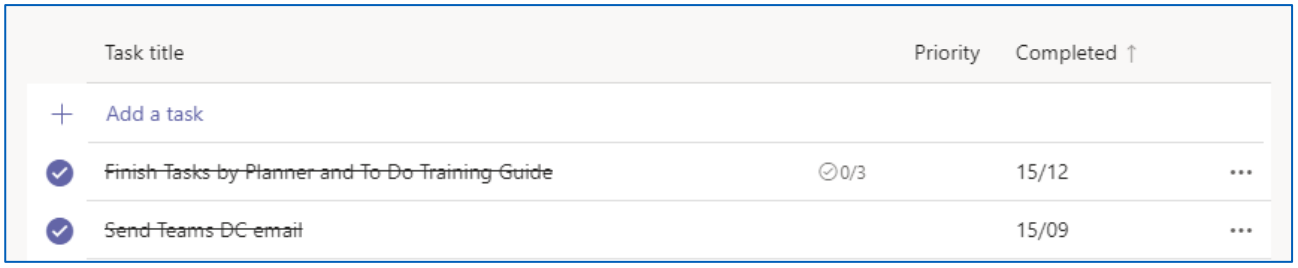
- Click the Circle next to the task to mark it as Completed.

- Select X from the top-right to close the task.

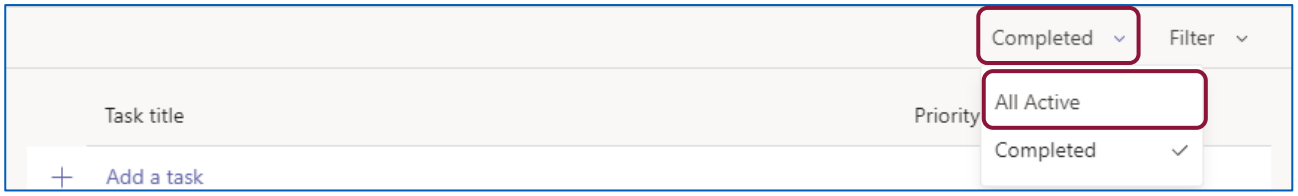
Completed tasks will move to the Completed list.

- To view completed tasks → click All Active drop-down arrow → select Completed.

All of the user's completed tasks will be displayed.



- To return to active tasks → click Completed drop-down arrow → select All Active.

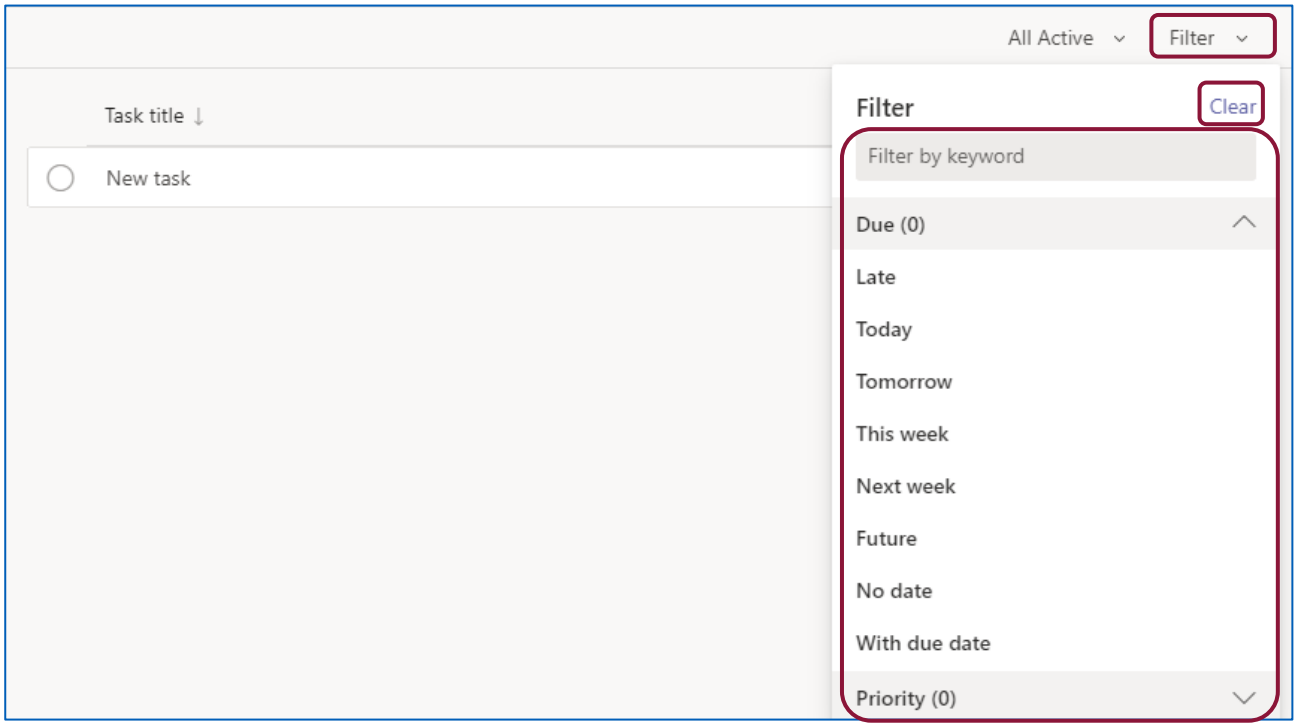


All of the user's active tasks will be displayed.

Filters

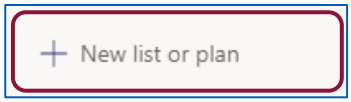
Filters can be applied to a list to sort a user's tasks by Keyword, Due date and Priority.

- To apply a filter → click Filter → select the desired filter.
- Click Clear to remove any applied filters

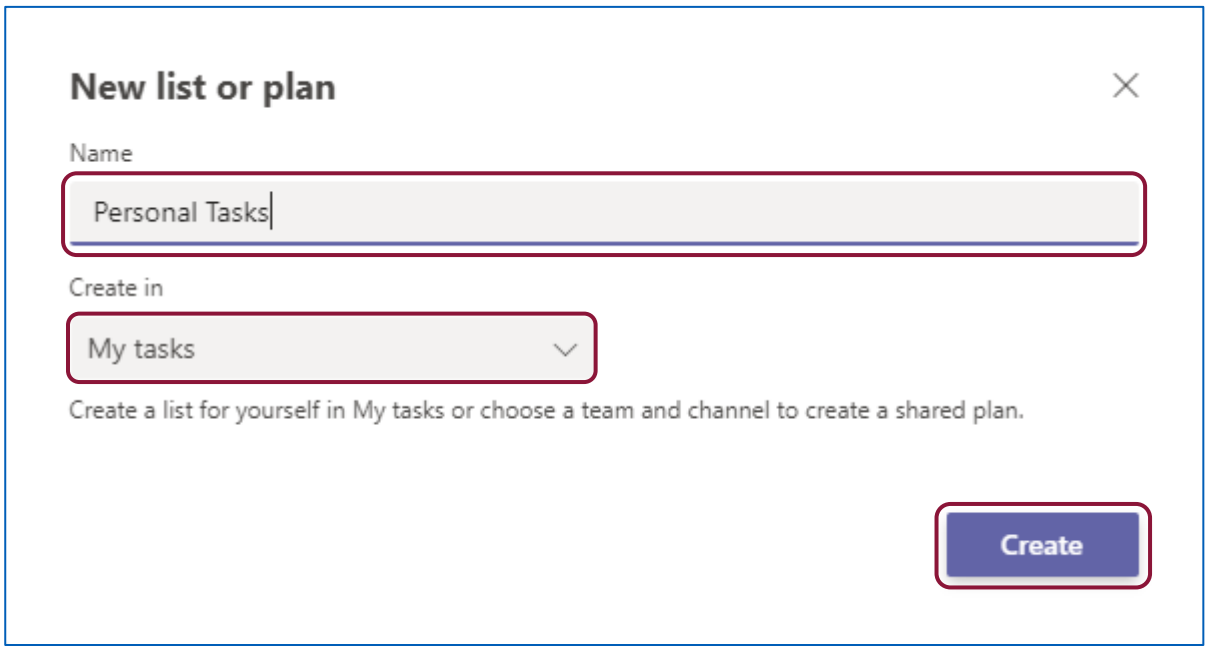


Create a New List

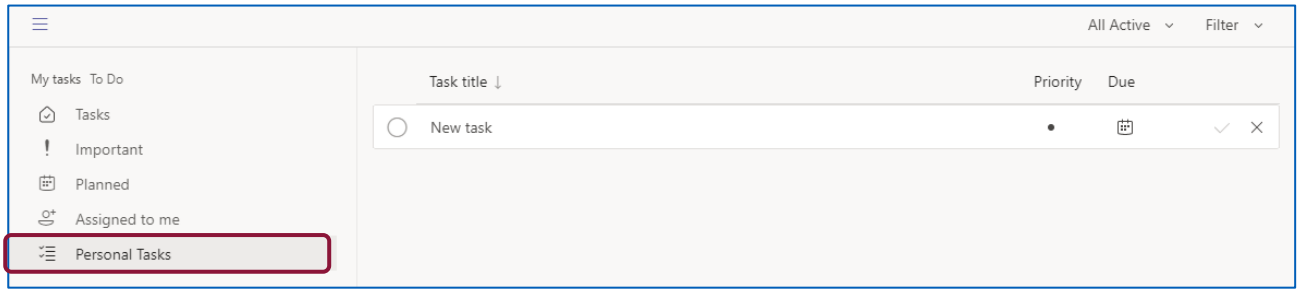
- To create a new list → select +New list or plan from the bottom-left of the screen.



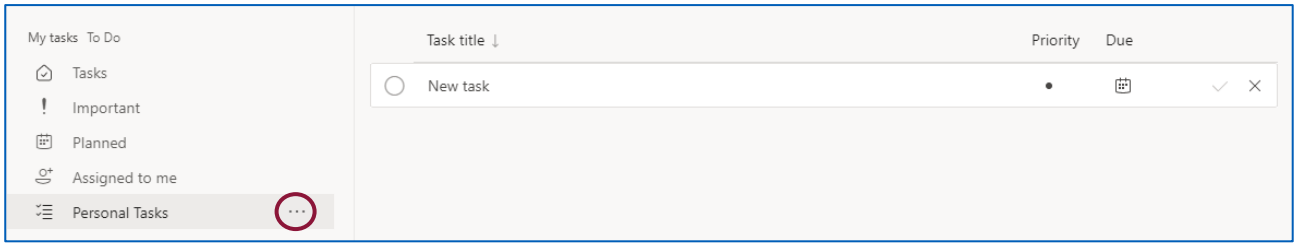
- Enter a Name for the list → ensure My tasks is selected → click Create.



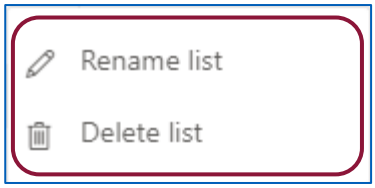
The list will be added under the My tasks section.



- Hover over the custom list and select the Ellipsis (3 dots) for More actions.



- Click to Rename / Delete the list as required.



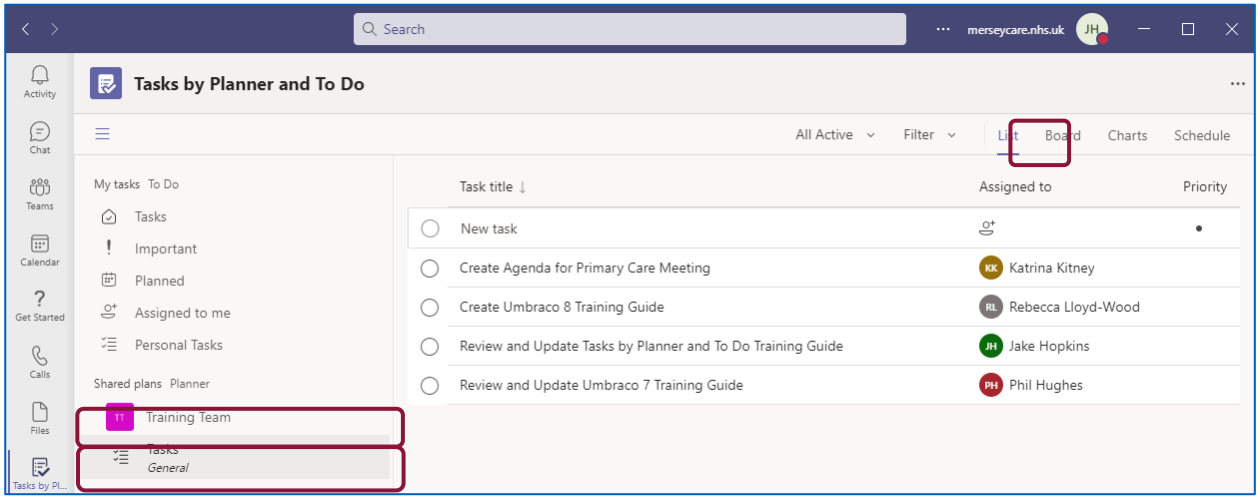
Group Tasks (Planner)

A plan can be created to organise group tasks within a Teams channel.

Existing plans can be opened from within either the Tasks app or from within the associated channel.

Open a Plan from within the Tasks app.

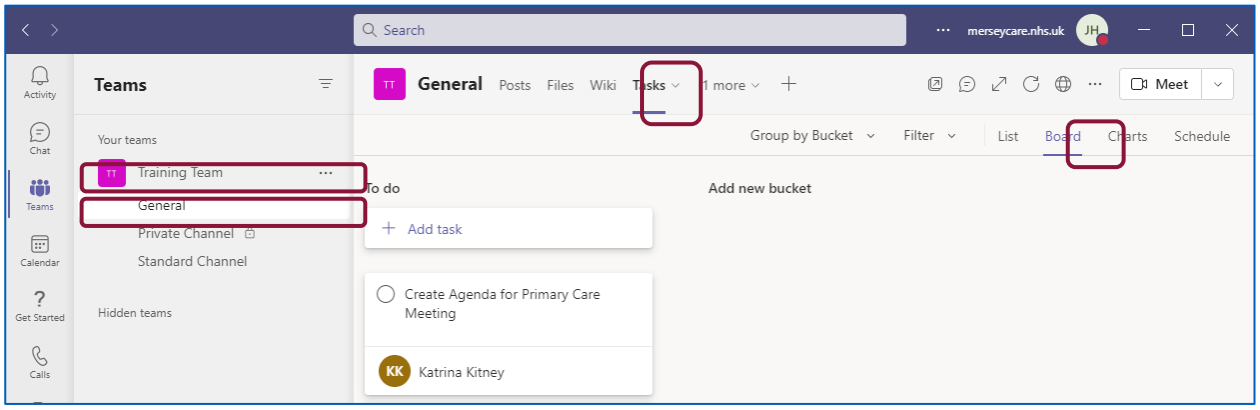
- From under Shared plans → locate the desired Team.
- Select a Plan to view any shared tasks for the channel.



A plan opened from within the Tasks by Planner and To Do app will open in List view as default.

Open a Plan from within a Channel.

- Navigate to the desired Team and Channel.
- Select the Tab that is named after the Plan.



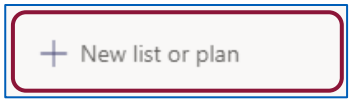
A plan opened from within a Channel will open in Board view as default.

A new plan can be created from within the Tasks by Planner and To Do app or from within the desired channel.

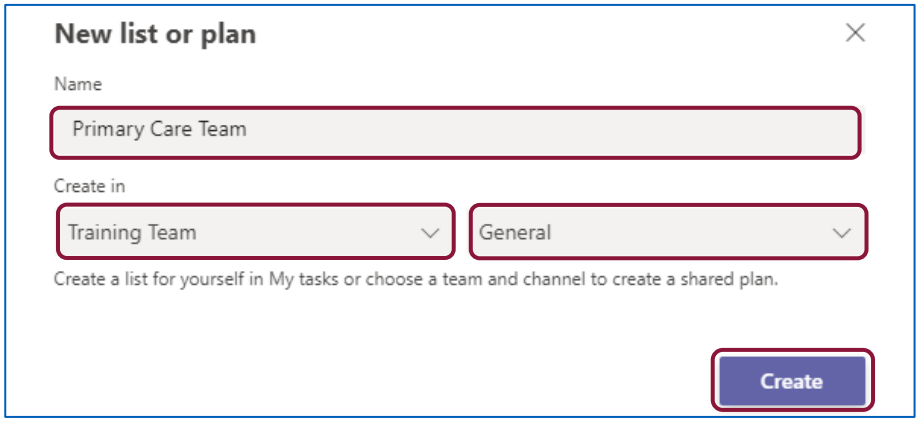
Plans can only be created in General and Standard channels, not in Private channels.

Create a New Plan from within the Tasks App

- To create a new list → select +New list or plan from the bottom-left of the screen.



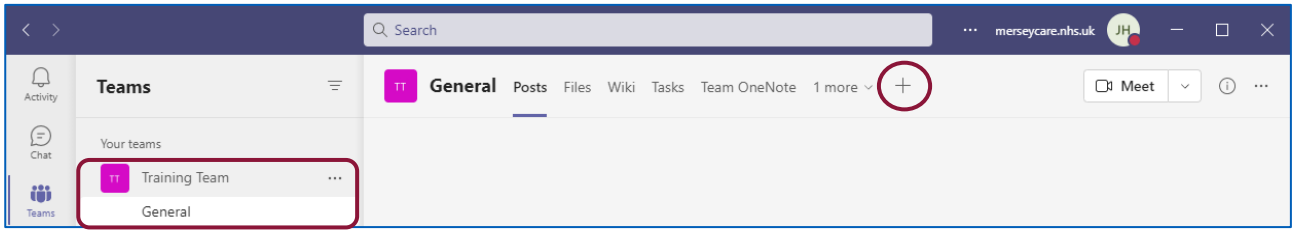
- Enter a Name for the plan → select the desired Team and Channel → click Create.



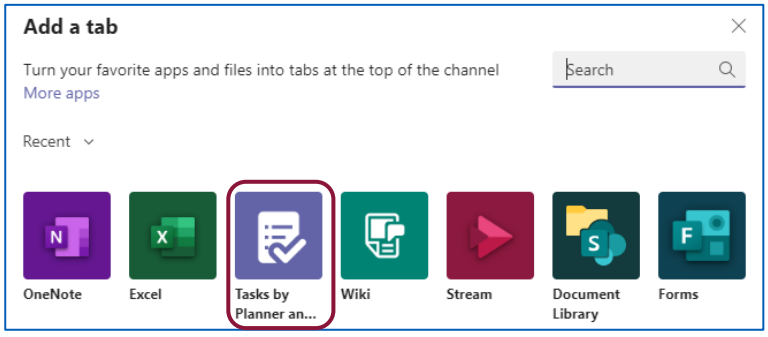
The plan will be created and added as a tab to the channel.

Create a New Plan from within a Channel

- Navigate to the desired Team and Channel.
- Click the + button at the top to Add a Tab.



- Select the Tasks by Planner and To Do app.



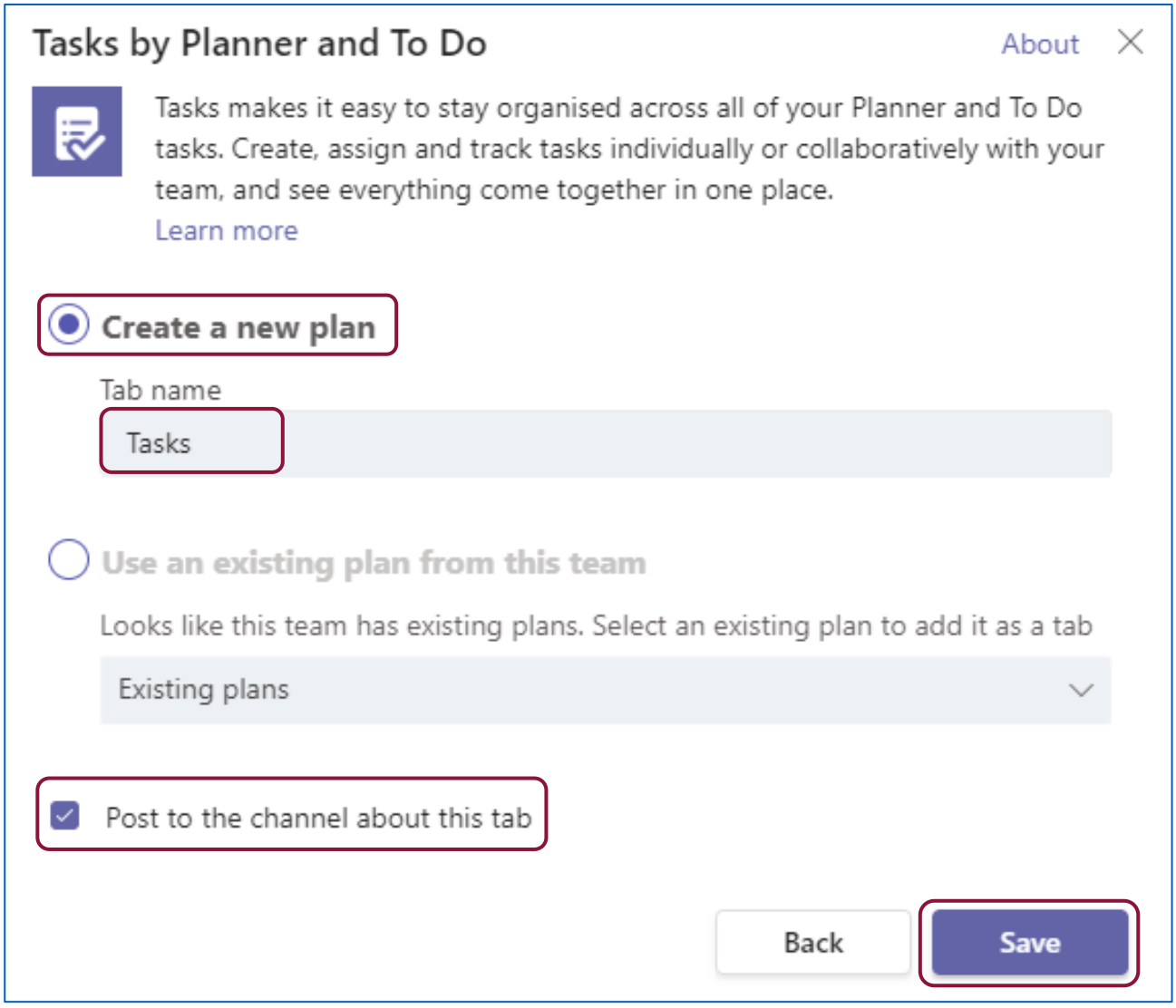
If the app does not appear or has not been used before, use the Search function to find it.

A box will appear with these options.

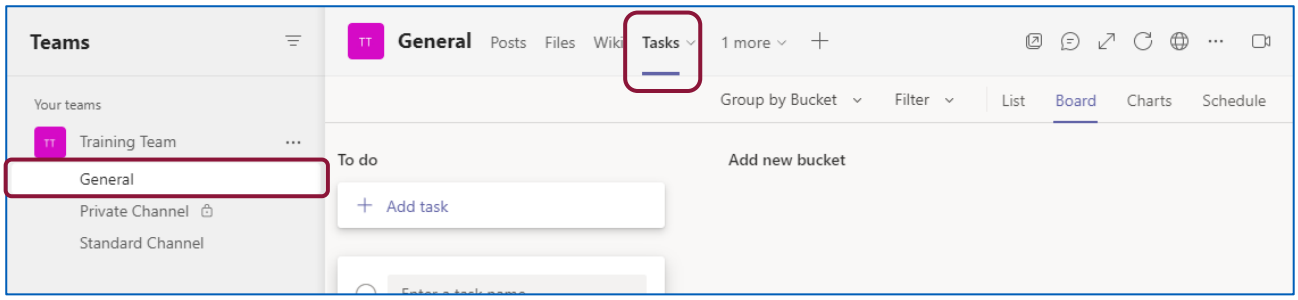
- ➢ Create a new plan
- ➢ Use an existing plan from this team

To create a New Plan.

- Select Create a new plan.
- Enter the Tab Name.
- Tick/untick Post to the channel about this tab as required.
- Click Save.



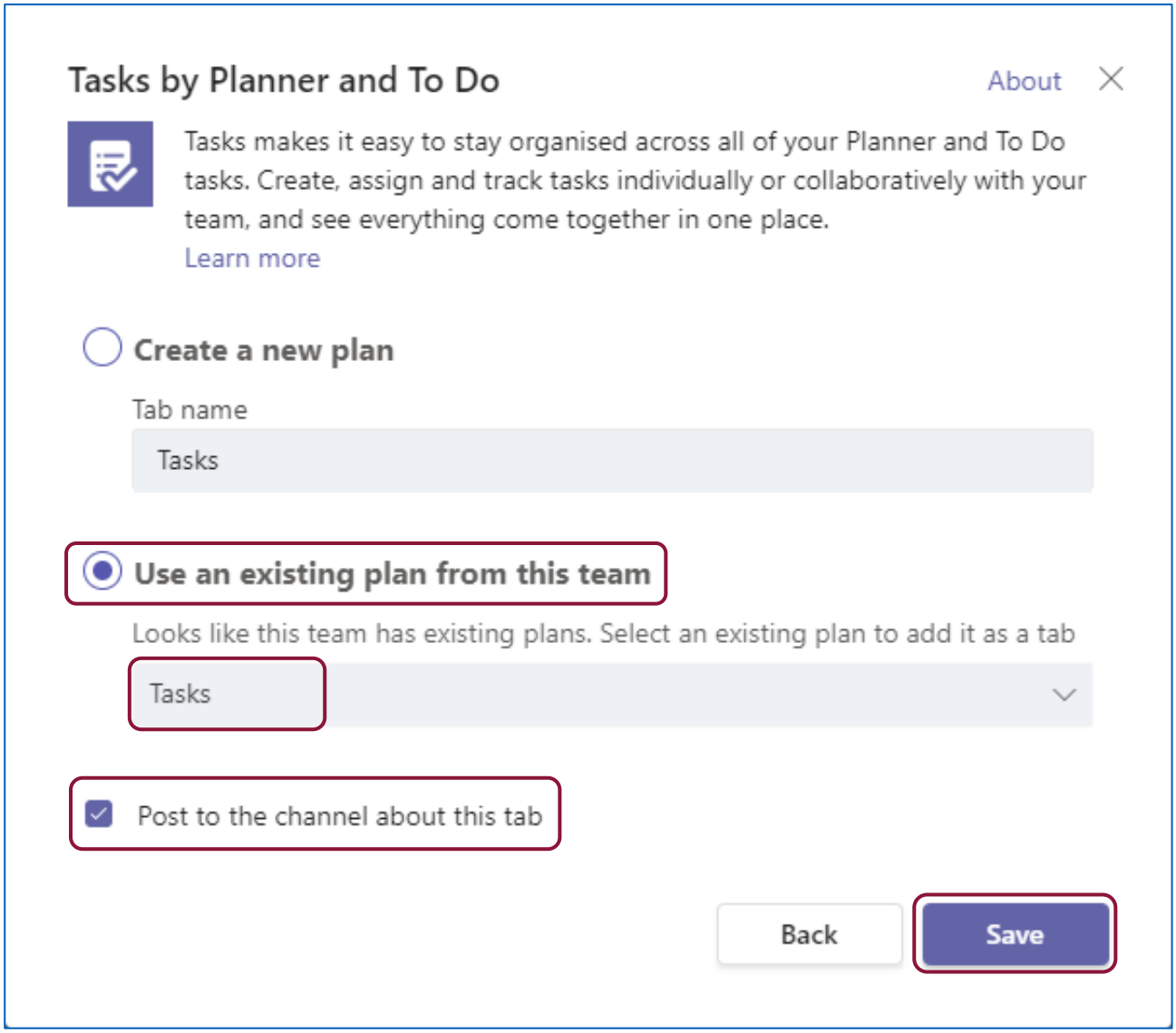
The plan will be created and added to the channel as a tab.



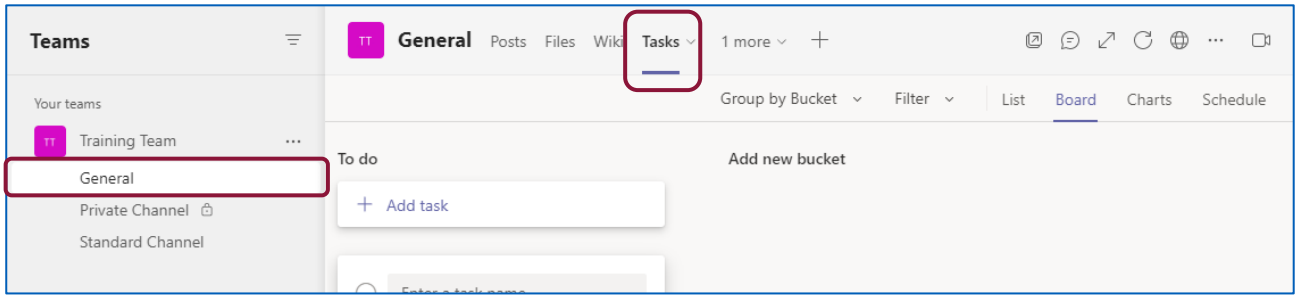
Use an Existing Plan from a Team

To use an existing plan.

- Select Use an existing plan from this team.
- Select an Existing plan from the drop-down list.
- Tick/untick Post to the channel about this tab as required.
- Click Save.

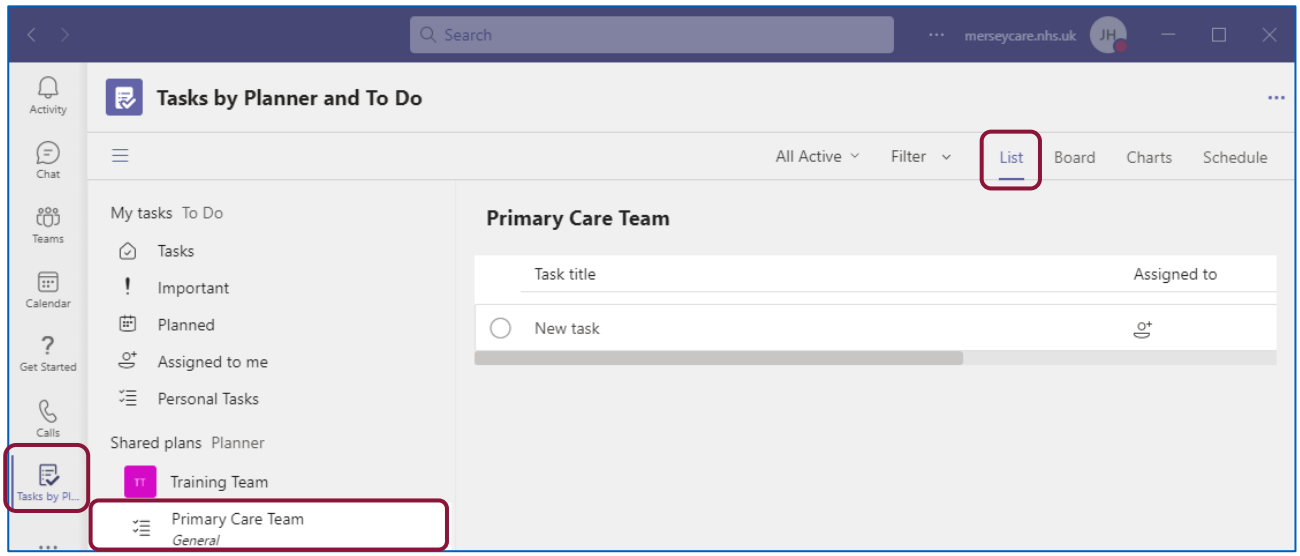


The plan will be created and added to the channel as a tab.



List View

- Within the Tasksby Planner and To Do app → select the desired Plan from Shared plans → select List view.



Create a New Task

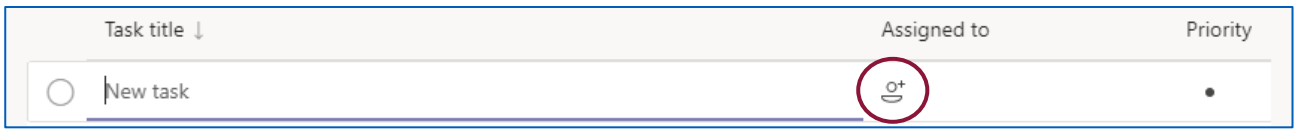
- Select New task → type in the task.

Assign Tasks

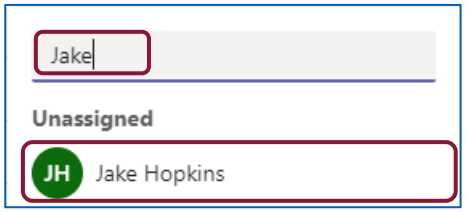
Both individual user tasks and tasks within a shared plan are created and edited in the same way. Within a shared plan there is the option to assign tasks to different users within the Channel.

To assign user(s) to a New task.

- Click the Assignment picker icon.

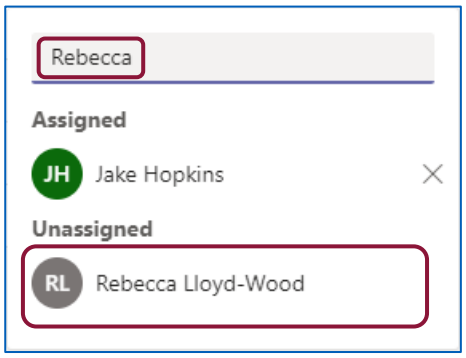


- Search for the desired user → select their name from the list.

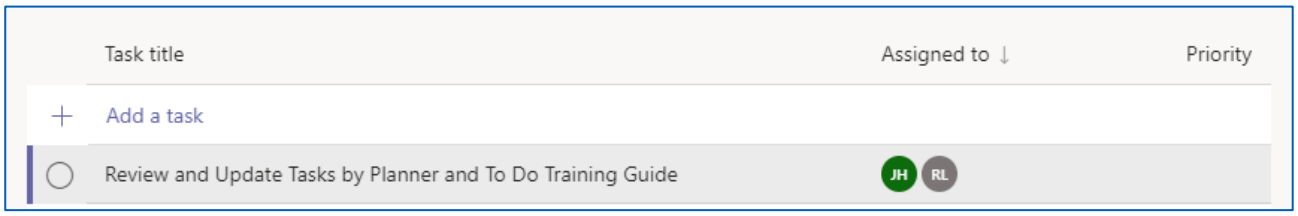


- To assign additional users → click the Assigned user's name.

- Search for the desired user → select their name from the list.

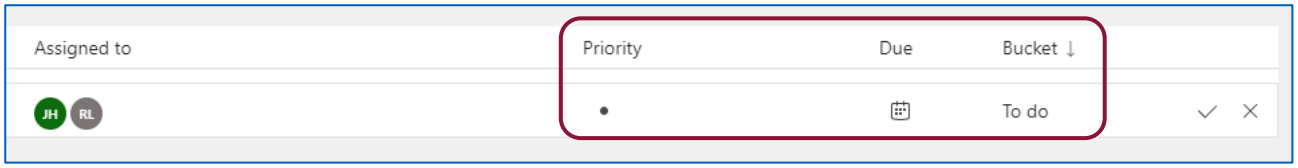


- Repeat as necessary until all the desired users have been added.

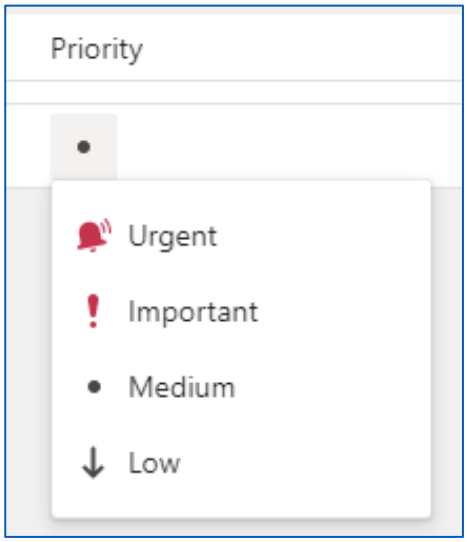


Users can also be assigned to current tasks from within Task properties.

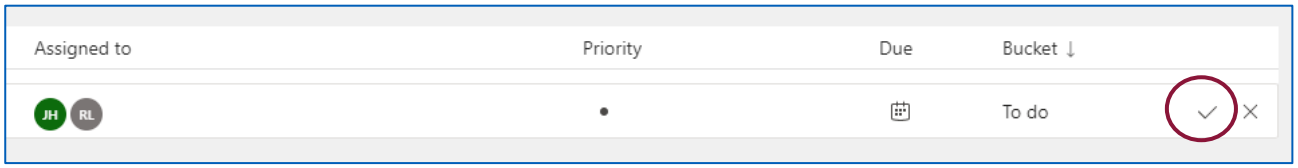
- Set the task Priority, Due date and assigned Bucket as required.



Additional Priority options are available for group tasks.

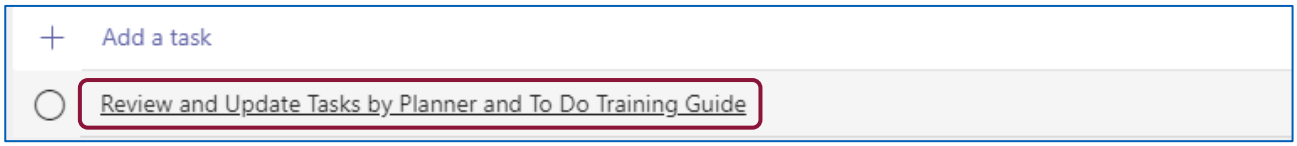


- Click the Tick icon to add the task.



Task Properties

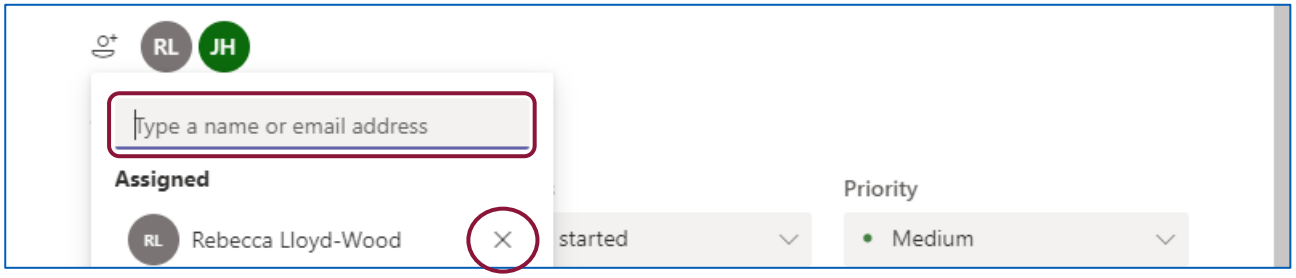
- Select a Task from the list to update the Task properties.



There are additional task properties for group tasks.

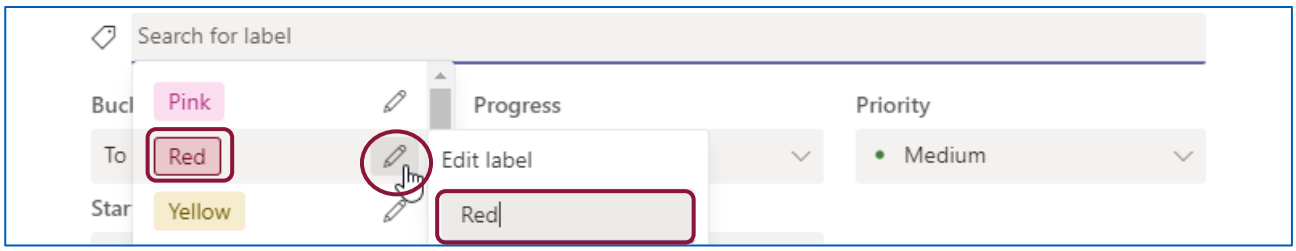
- Click the Assignment picker icon to update the assigned users.

- Search for the desired user → select their name from the list.
- Click the X next to a user's name to Unassign them.
- Repeat as necessary until all the desired users have been added.

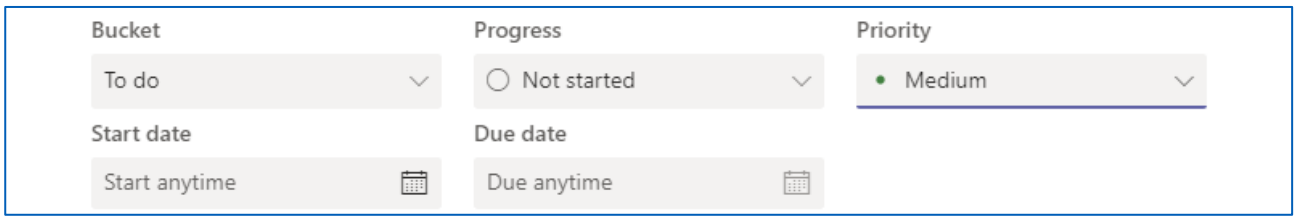


- Click Add label to add a coloured label to the task.

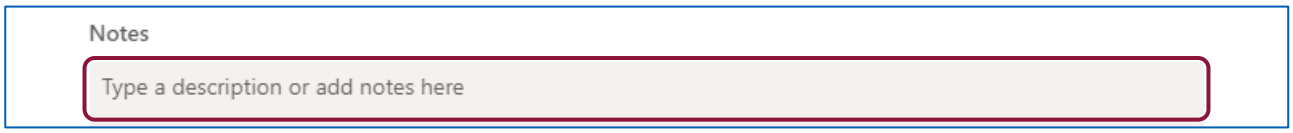
- Click the Pencil to Edit the label name if required.
- Select the desired Label to apply it to the task.



- Set the assigned Bucket, Progress, Priority, Start date and Due date as required.



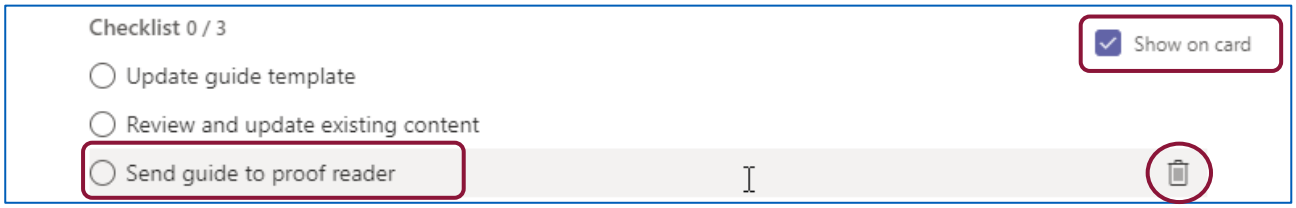
- Type in a Description or add any Notes that relate to the task.



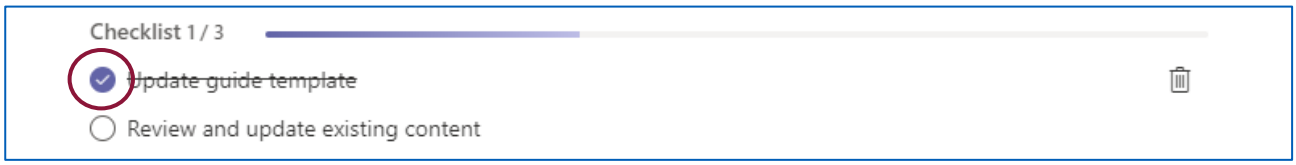
A Checklist can be used to create subtasks that need to be completed in order to achieve the main task.

- Click Add an item → type in the item → press the Enter key.
- Repeat this step to add additional items to the Checklist as required.

- Select an item's text to make changes.
- Click the Bin to Delete the item if required.
- Tick Show on card to show the checklist on the Task card within the Board view.



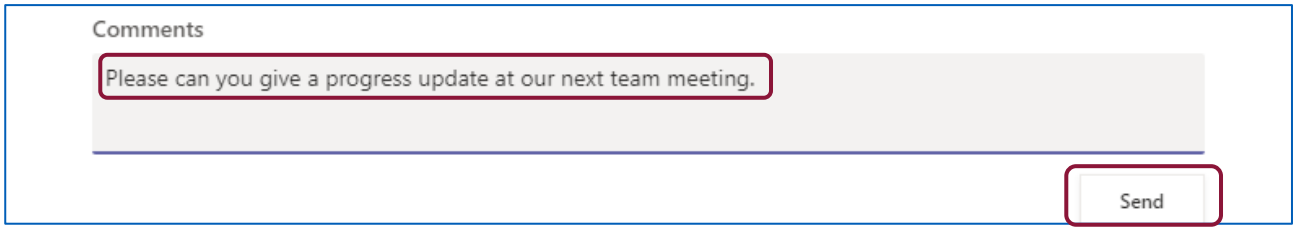
- Click the Circle next to a checklist item to mark it as Completed.



Files can be attached to the task from the computer, from within Teams or as a URL link.

- Click Add attachment to attach a file.

- Add any Comments as required → click Send → Assigned users will receive an email which contains the comment.

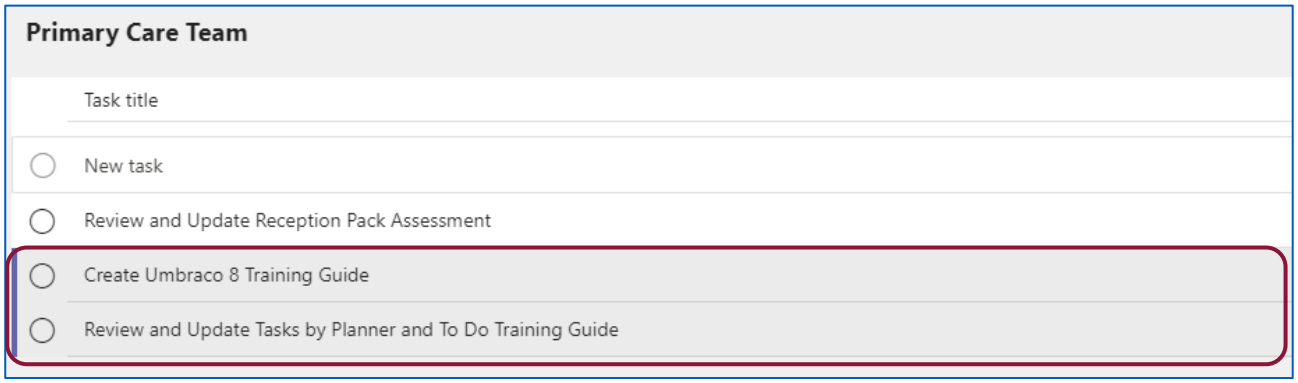


- Select X from the top-right to close the task.

Task Options

It is possible to update the Task Options for multiple tasks at the same time.

- Hold-down the Ctrl key → select the desired Task(s).



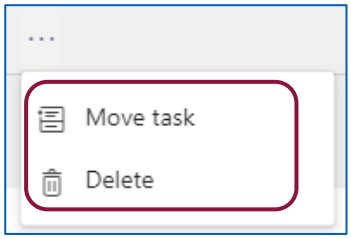
The number of selected tasks is displayed on the toolbar at the top-right of the screen.

- Click X to de-select the tasks if required.

- Configure the desired option(s) from the toolbar at the top of the screen.

This will apply to all the selected tasks.

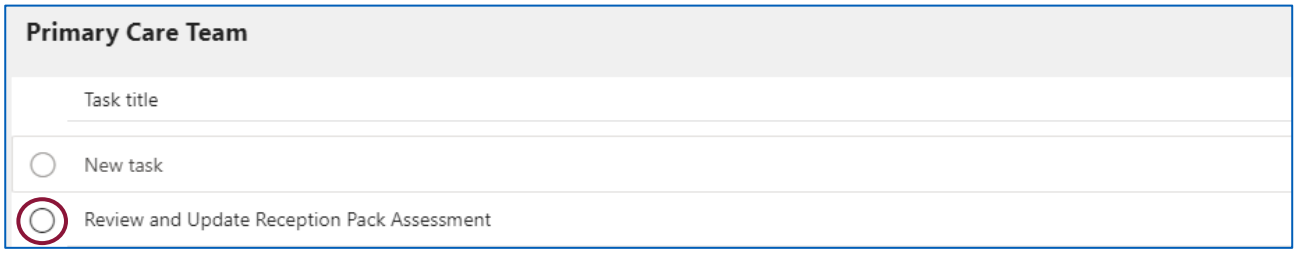
- Click the Ellipsis (3 dots) for More options.



Complete a Task

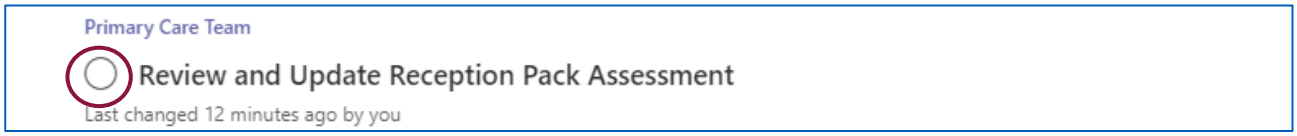
There are two ways to mark a task as completed.

- Either click the Circle next to the task to mark it as Completed.



- Alternatively, select the Task from the list to view Task properties.

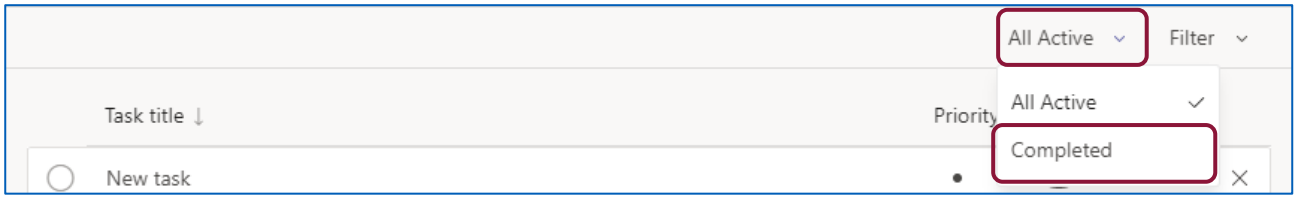
- Click the Circle next to the task to mark it as Completed.



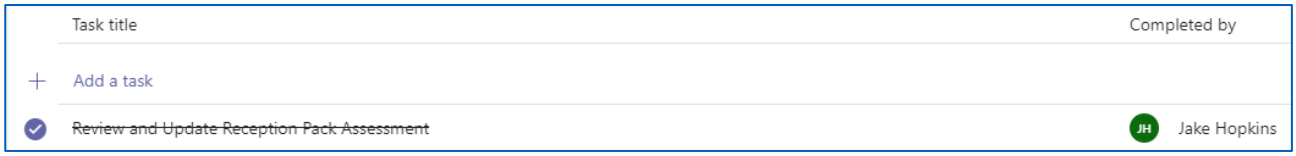
- Select X from the top-right to close the task.

Completed tasks will move to the Completed list.

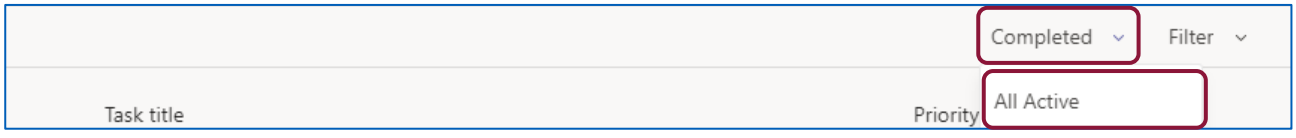
- To view completed tasks → click All Active drop-down arrow → select Completed.



All the plan's completed tasks will be displayed along with the user who completed each task.



- To return to active tasks → click Completed drop-down arrow → select All Active.

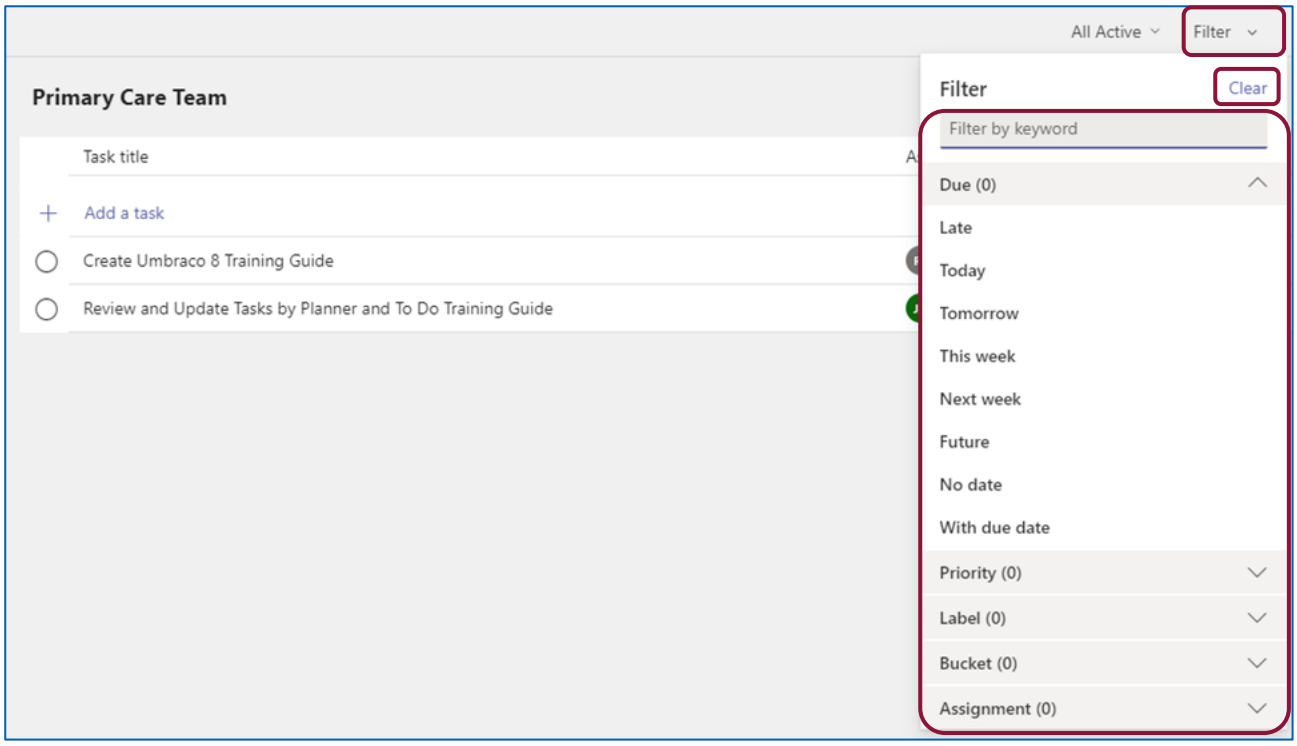


All the user's active tasks will be displayed.

Filters

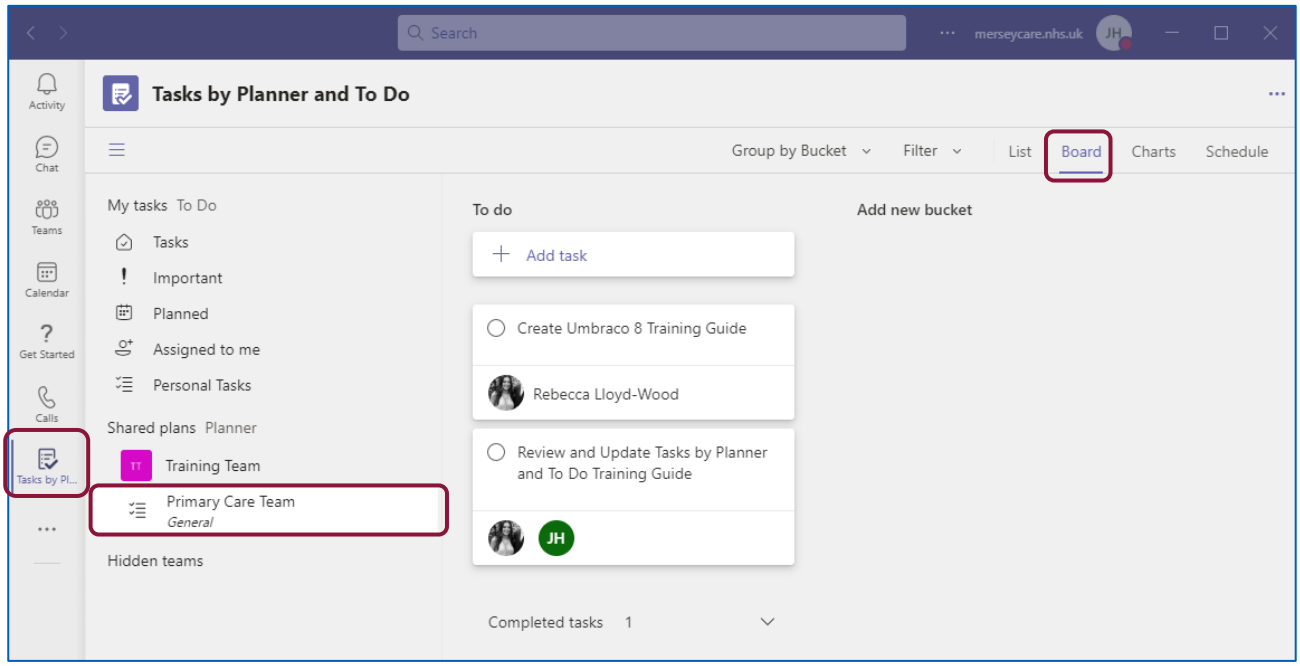
Filters can be applied to a list to sort group tasks by Keyword, Due date, Priority, Label Bucket and Assignment.

- To apply a filter → click Filter → select the desired filter.
- Click Clear to remove any applied filters

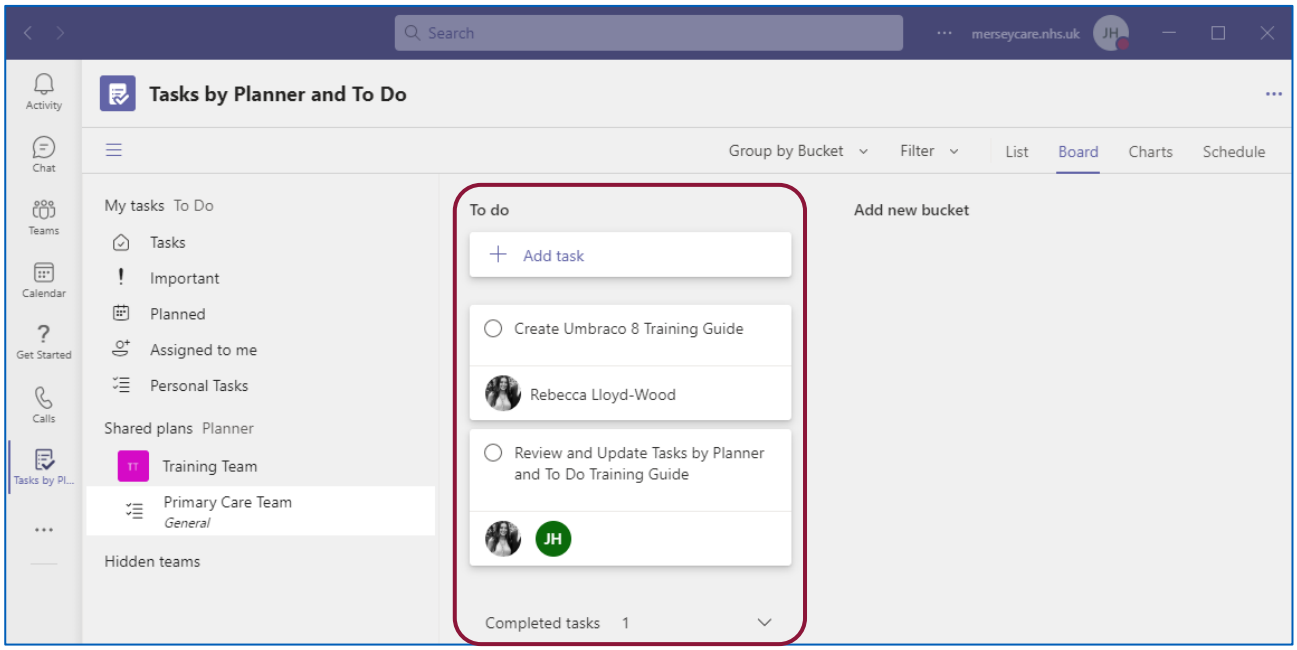


Board View

- Within the Tasks by Planner and To Do app → select the desired Plan from Shared plans → select Board view.

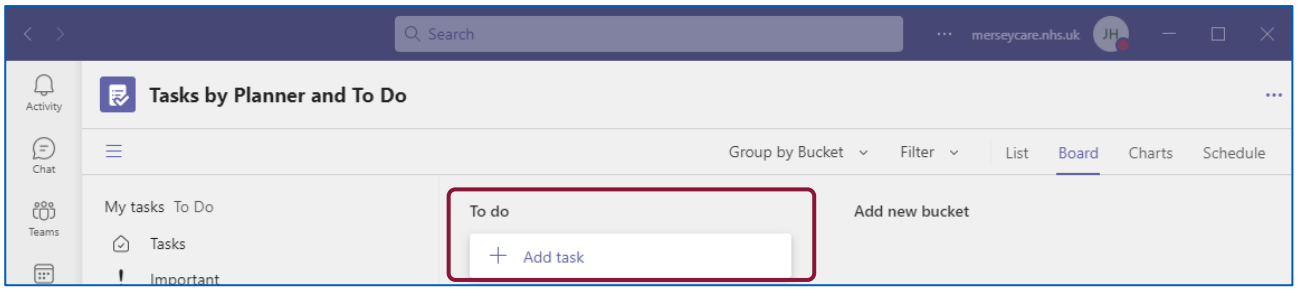


The Board view displays all tasks as cards within their assigned buckets. In this example there are two active tasks and one completed task within the To do bucket.

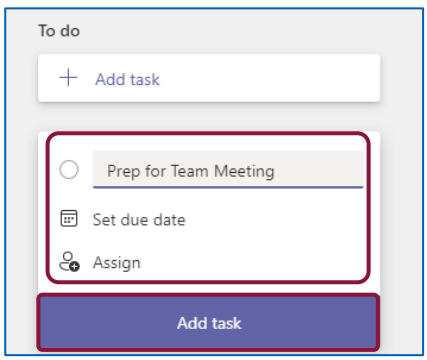


Create a New Task

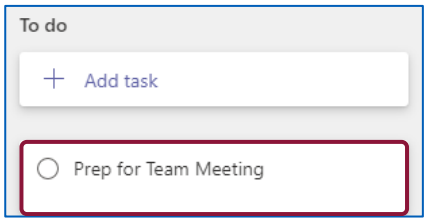
- Locate the desired bucket → click Add task.



- Type in the task → Set due date and Assign users as required.
- Click Add task.

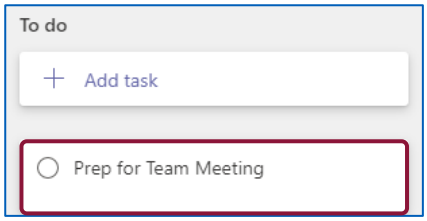


The task will be added as a card to the bucket.

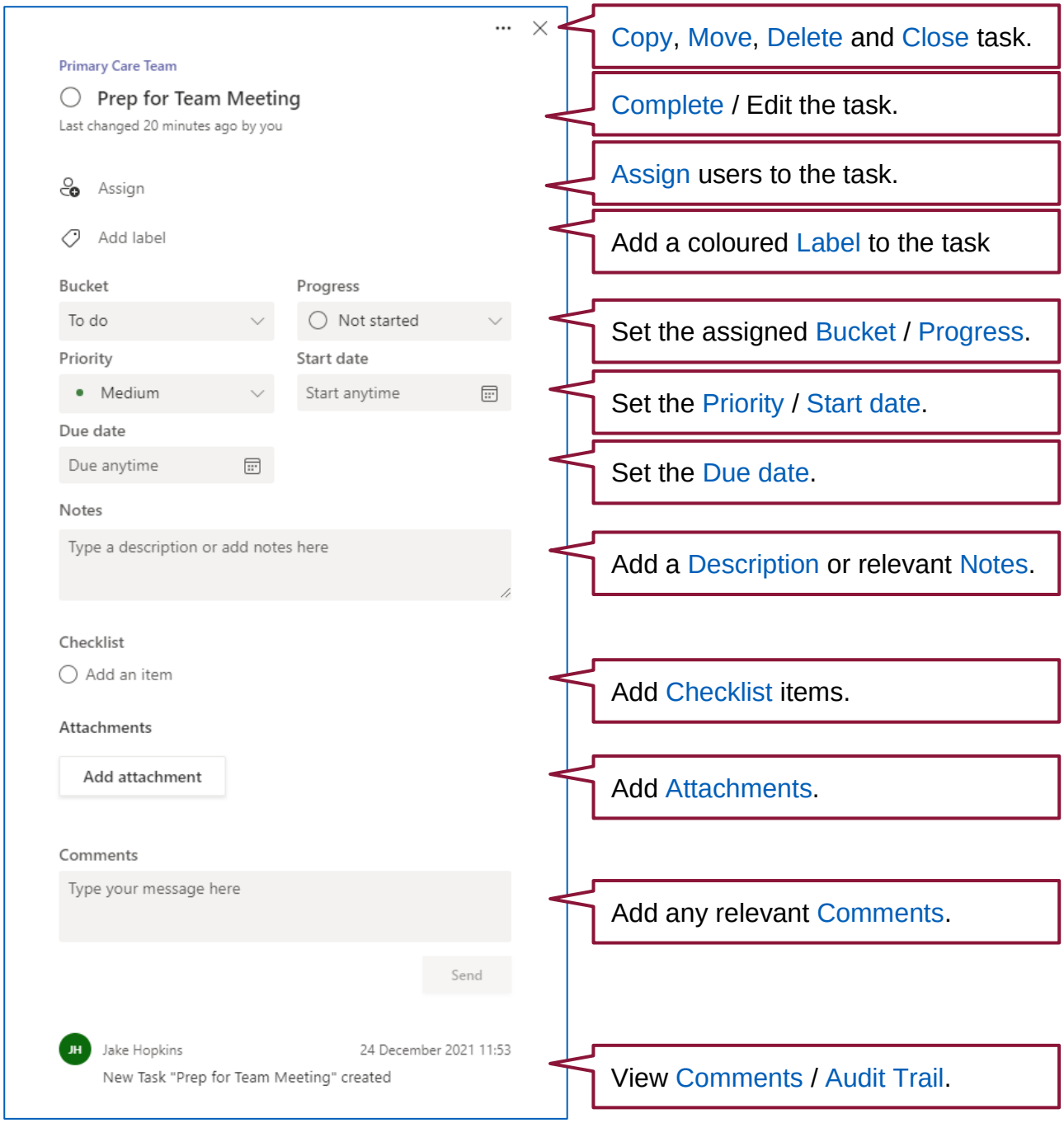


Task Properties

- Select a Task card to view Task properties.



- Configure the task properties as required.

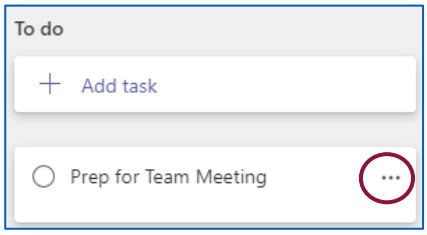


- Once finished → select X from the top-right to close the task.

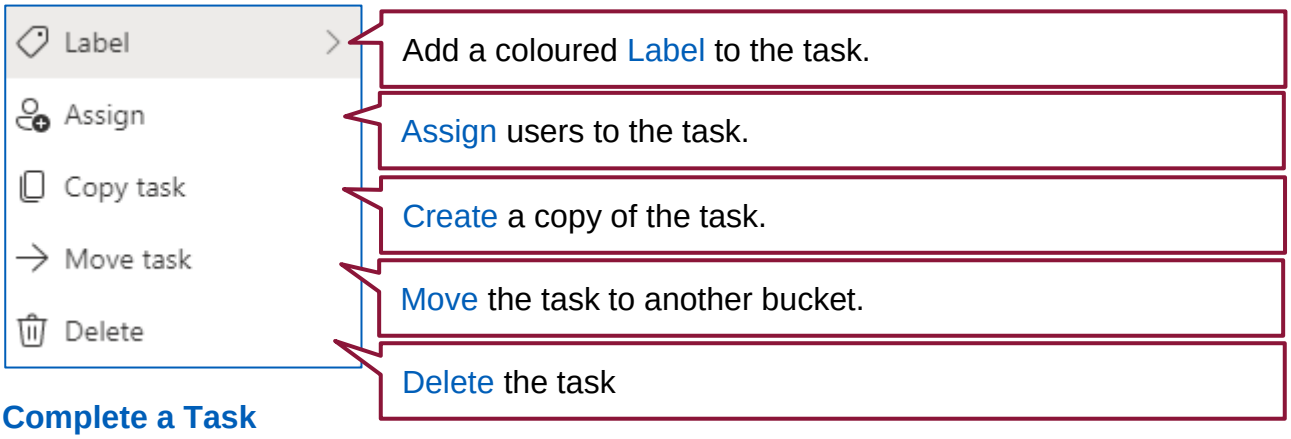
Task Options

To configure task options from within Board view.

- Hover over the Task card → click the Ellipsis (3 dots).



- Select the desired option from the list.

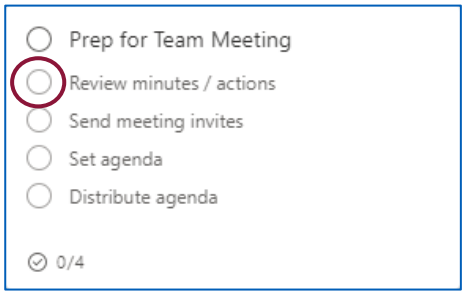


Complete a Task

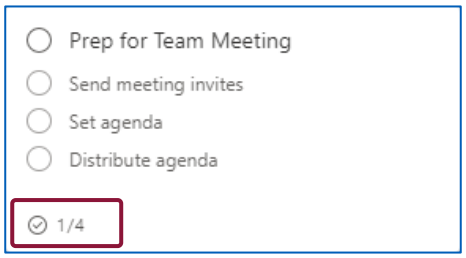
If a task has a checklist and Show on card was ticked within task properties, the checklist will be displayed on the task card.

To complete a checklist item.

- Click the Circle icon next to a checklist item to mark it as complete.

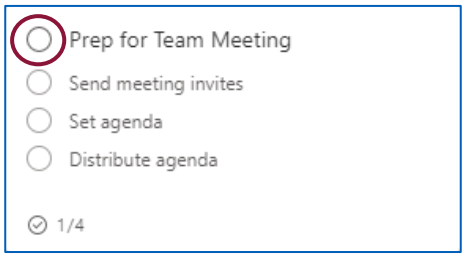


Completed items will be removed from the checklist and the checklist icon at the bottom of the card will update.



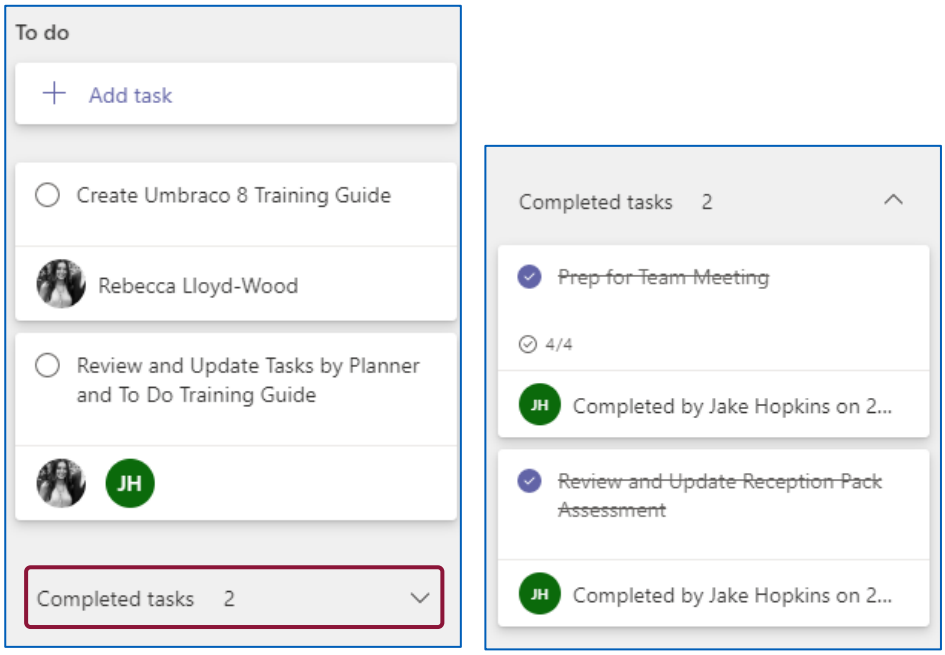
To complete a task card.

- Click the Circle icon next to the task to mark it as complete.



Completed tasks will move to the Completed Tasks section at the bottom of the bucket.

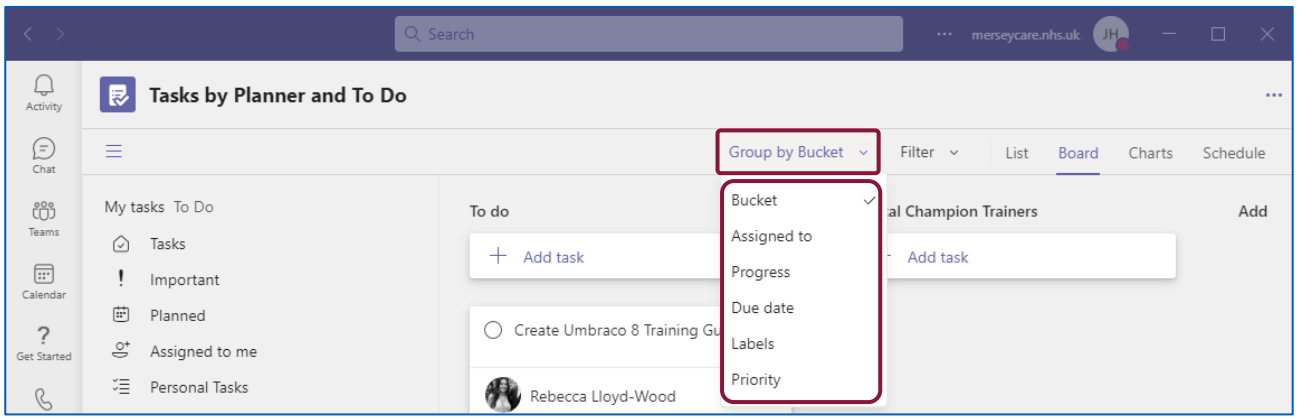
- To view completed tasks → click Completed Tasks.



Filters

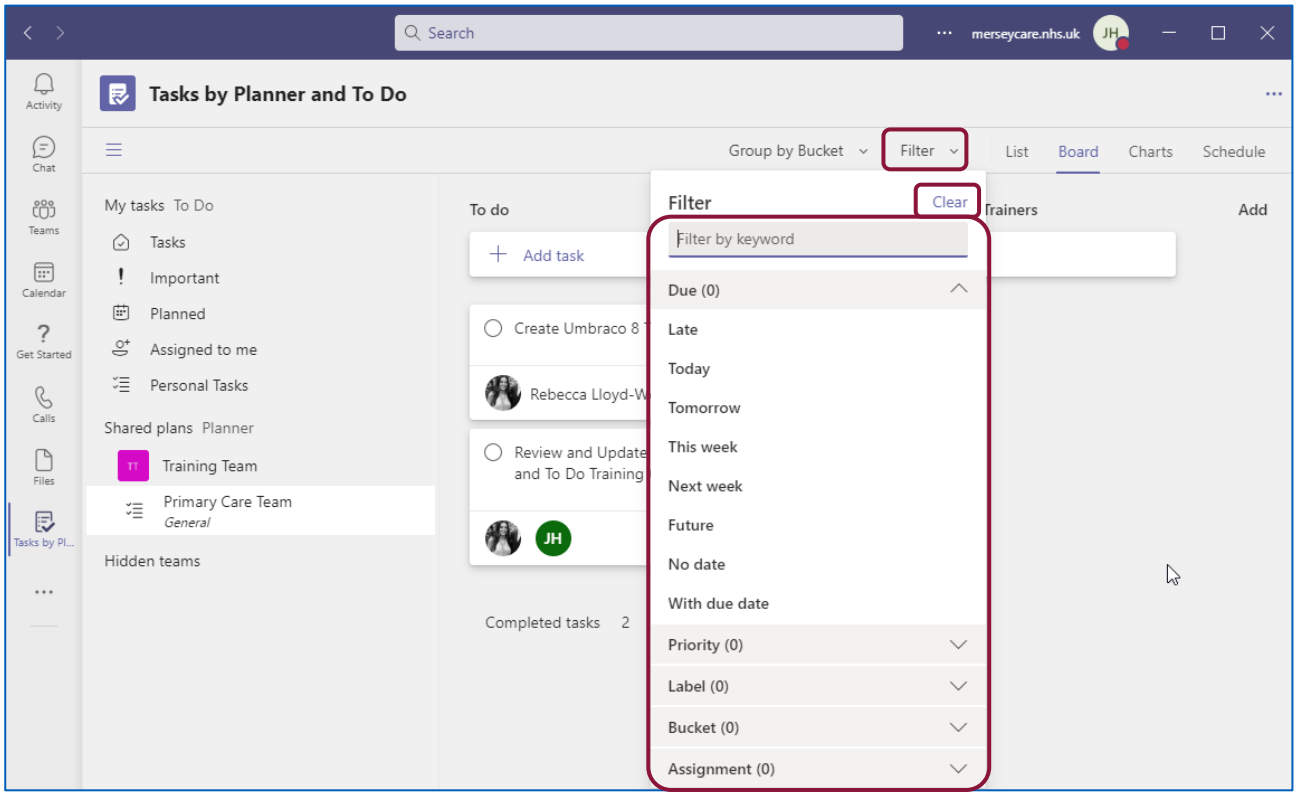
Tasks within Board view can be grouped by Bucket, Assigned user, Progress, Due Date, Labels and Priority. Tasks within Board view are grouped by Bucket as default.

- To change how the tasks are grouped → click Group by Bucket → select the desired option from the list.



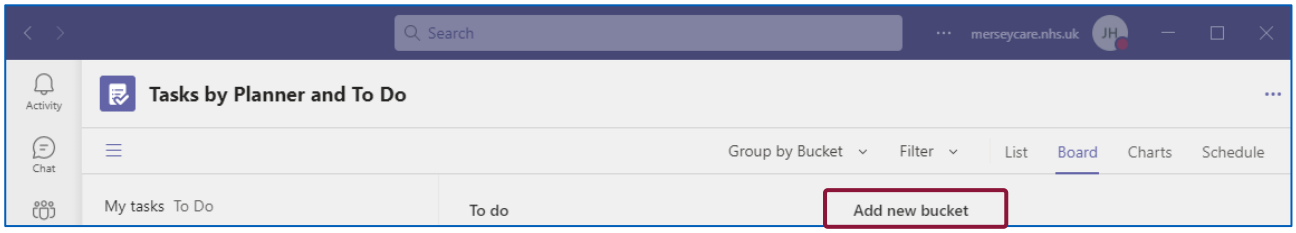
Filters can be applied to a list to sort group tasks by Keyword, Due date, Priority, Label Bucket and Assignment.

- To apply a filter → click Filter → select the desired filter.
- Click Clear to remove any applied filters



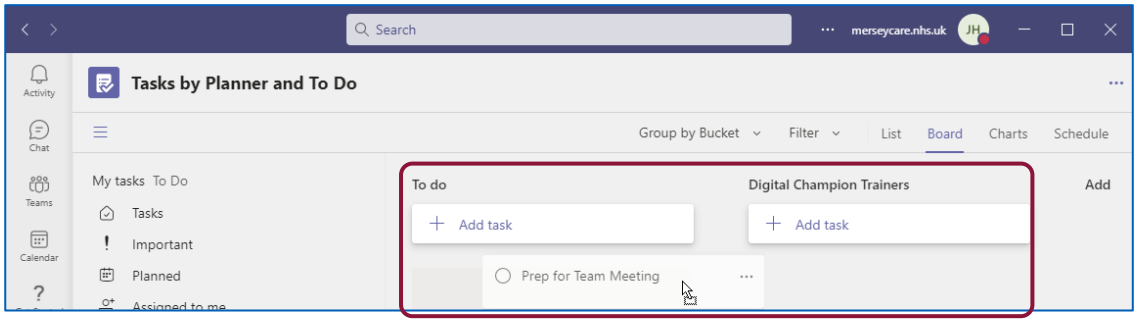
Add a New Bucket

- Click Add new bucket.



- Enter the Bucket name → press the Enter key.

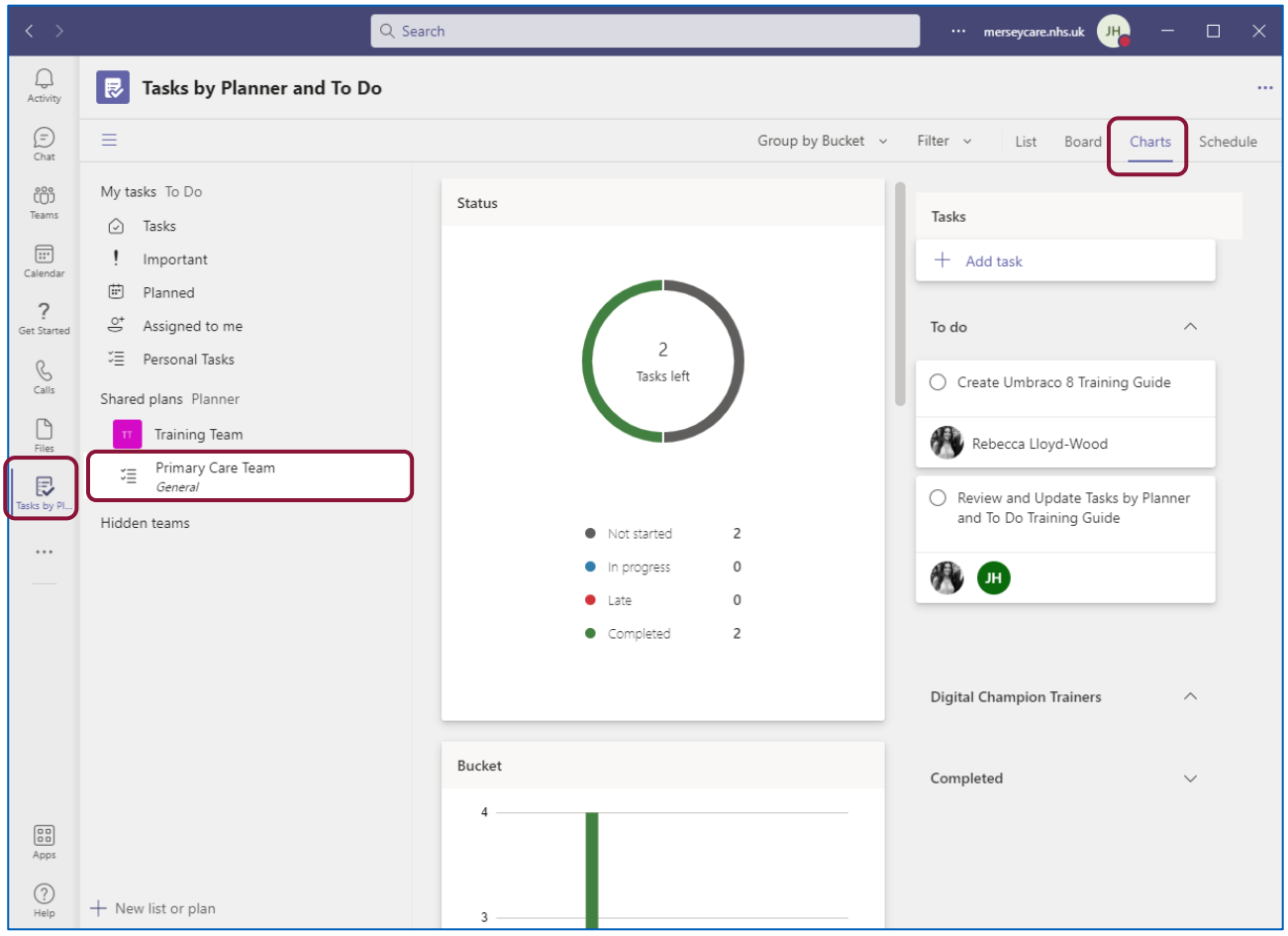
- Drag and drop tasks from one bucket to another if required.



Charts View

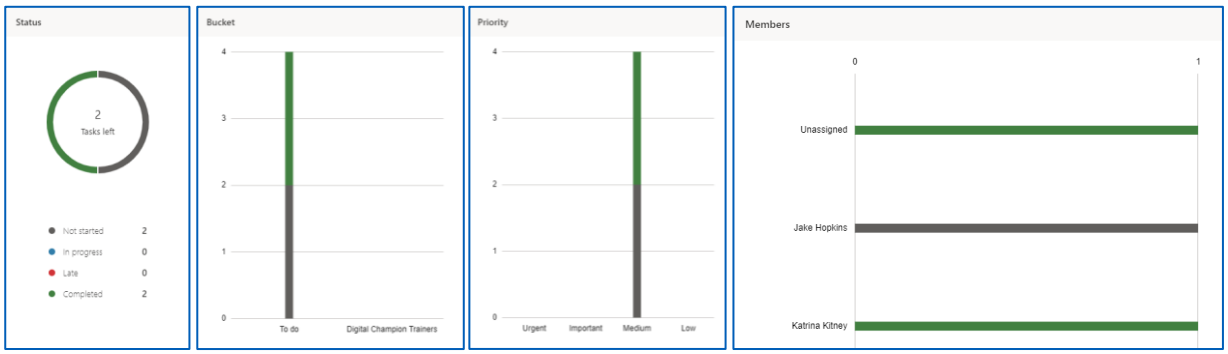
The Charts view can be used to monitor workload and see how work is progressing.

- Within the Tasks by Planner an To Do app → select the desired Plan from Shared plans → select Charts view.



The different Charts include.

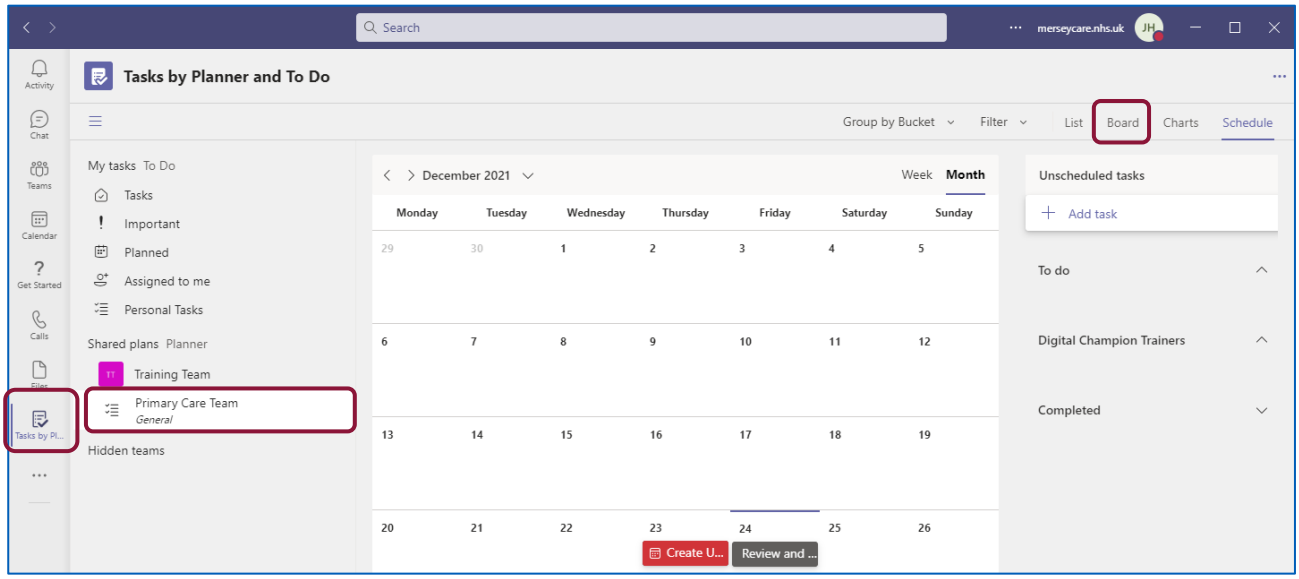
- Status – sorts tasks by Not Started, In progress, Late and Completed.
- Bucket – shows how many tasks are in each bucket, colour coded by progress.
- Priority – sorts task by Urgent, Important, Medium and Low.
- Members – shows how many tasks are assigned to each user.



Schedule View

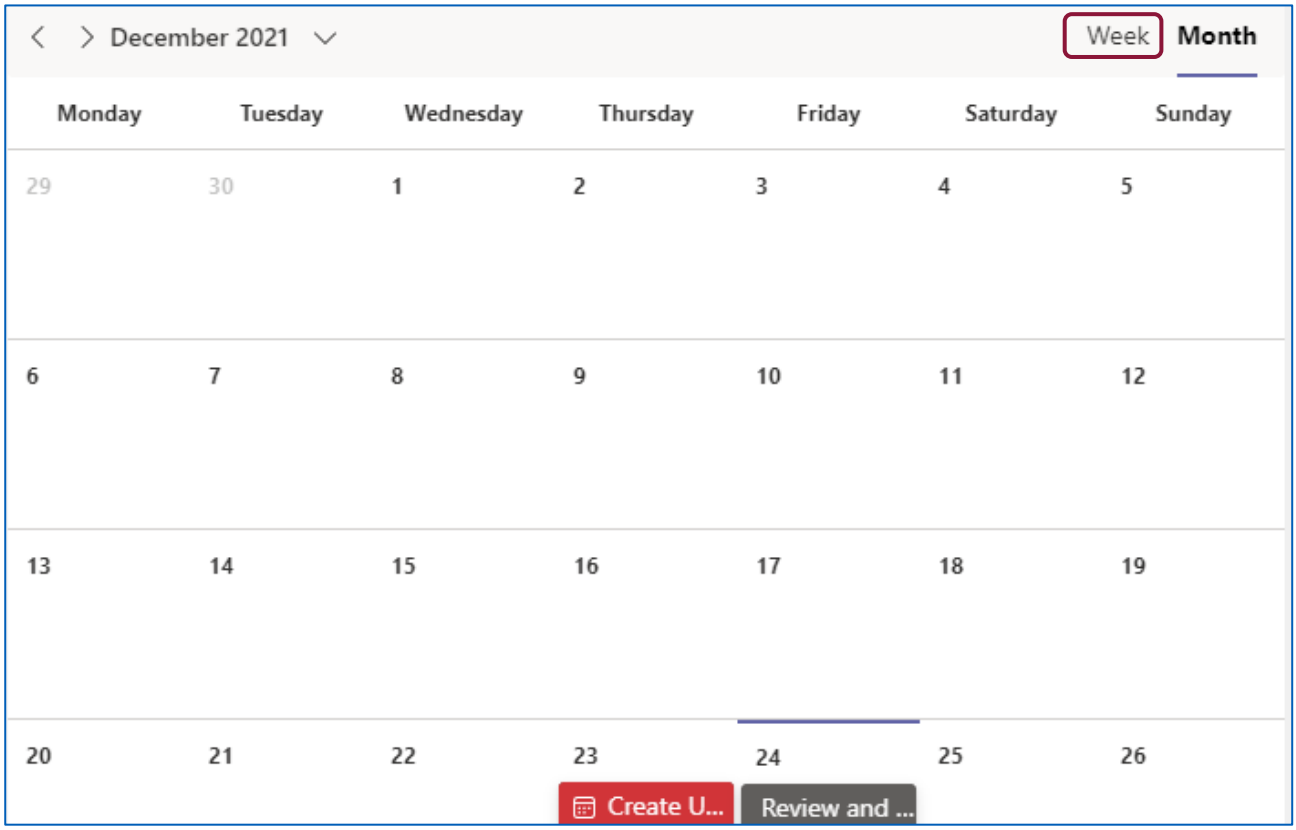
The Schedule view shows a calendar with assigned tasks listed by their scheduled Due date.

- Within the Tasks by Planner and To Do app → select the desired Plan from Shared plans → select Schedule view.



Month view is displayed as default.

- To view week view, click Week.



Contact Details

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