

Training Guide

Teams Tasks by Planner and To Do App



To book training or to speak to a trainer, please get in touch via:

e training@imerseyside.nhs.uk

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

Document Type		Document Title		
Training Guide		Teams Tasks by Planner and To Do App		
Version	Date	Owner	Change	Purpose
V0.1	27 July 2020	Rachel Bertenshaw	Guide Creation	Training Aid
V0.2	18 August 2020	Jo Menary	Minor format changes	Proof Read
V1.1	20 September 2020	Rachel Bertenshaw	Phone number removed	Quality
V2.1	10 December 2020	Darren Melling	Change of Title, Font formatting and updates	Quality & Updates.

Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	18 August 2020	Jo Menary	Lead Trainer
V2.0	25 September 2020	Rachel Bertenshaw	Lead Trainer
V3.0	15 December 2020	Rachel Bertenshaw	Lead Trainer

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

Table of Contents

Add a Planner Tab to a Team Channel.....	4
Create a New Plan	5
Use an Existing Plan	6
Add Planner as an App to the Navigation Pane	7
Board View - Add Buckets and Assign Tasks	8
Add a New Bucket.....	8
Additional Bucket Features	9
Set Task Progress.....	9
Set Task Priority	10
Set the Start Date.....	10
Add Notes	10
Create a Checklist.....	11
Add an Attachment.....	11
Add Comments	12
Add a Label	12
Update a Task.....	14
Assign a Task to Multiple People	14
Use Filters and Groups	15
Add a Filter.....	15
Remove a Filter.....	15
Change the Group Option	16
View Completed Tasks.....	16
Charts	17
Chart Types.....	17
Add a Chart Filter	17
Remove a Chart Filter	18
Schedule.....	19
Display Tasks.....	19
Add a Task in Schedule View.....	19
Delete a Task.....	20
List.....	21
Contact Details	22

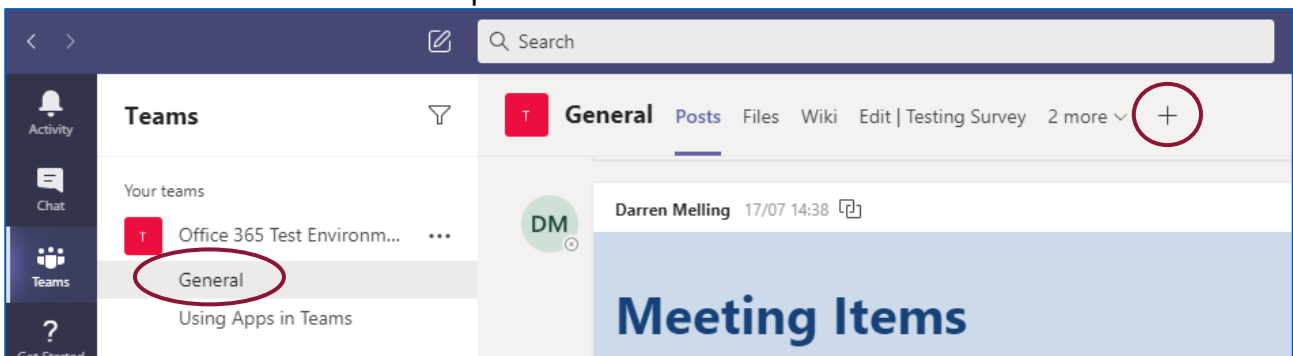
Use Tasks by Planner and To Do in Microsoft Teams

Tasks by Planner is a Microsoft application and is part of the Office 365 suite. It can be installed as an app within Teams but it does not have all of the functionality of the full Office 365 application.

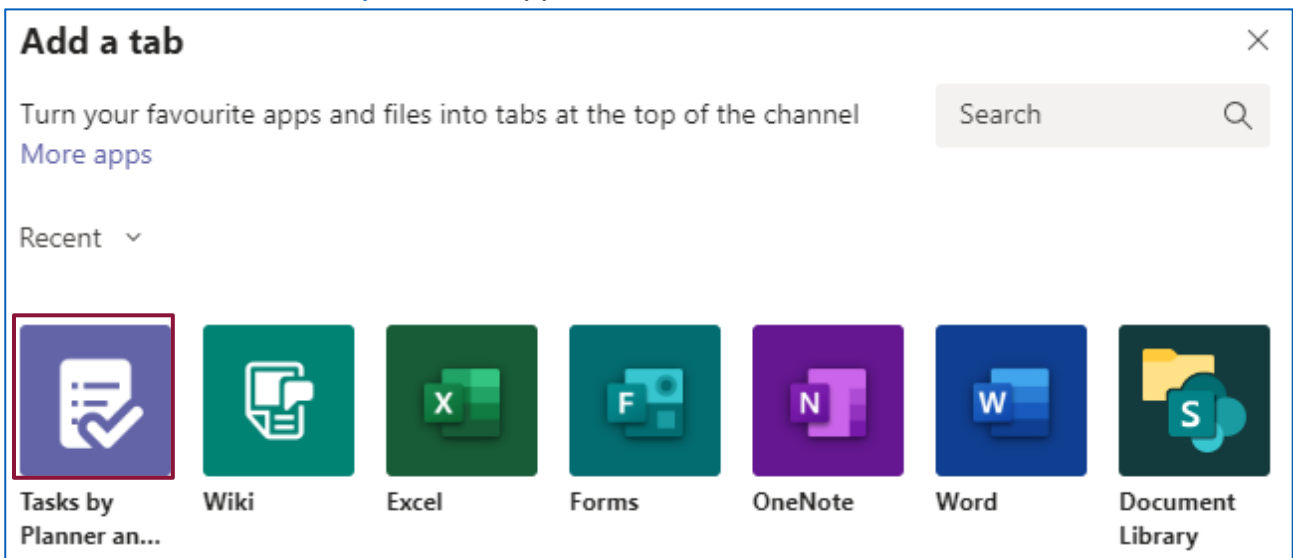
Tasks by Planner is used to organise tasks in Teams and it can be added as a tab to [Public](#) Channels only. It can be edited within Teams and also in a web browser, via a Microsoft Online Account.


Add a Planner Tab to a Team Channel

- Go to the [Team Channel](#).
- Click the [+](#) button at the top to [Add a Tab](#).



- Select the [Tasks by Planner](#) app.



 If the App doesn't appear or has not been used before, use the [Search](#) function to find it.


If the team already has existing plans created, a box will appear with these options.

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

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](#).

Tasks by Planner and To Do About ×

 Tasks makes it easy to stay organised across all of your Planner and To Do tasks. Create, assign and track tasks individually or collaboratively with your team, and see everything come together in one place.
[Learn more](#)

Create a new plan

Tab name

Use an existing plan from this team
Looks like this team has existing plans. Select an existing plan to add it as a tab

Post to the channel about this tab

The Planner tab is now added to the channel.

Teams ▼ T **General** Posts Files Wiki **Office 365 Planner** ▼ 3 more +

Your teams
T Office 365 Test Environm... ⋮

General
Using Apps in Teams

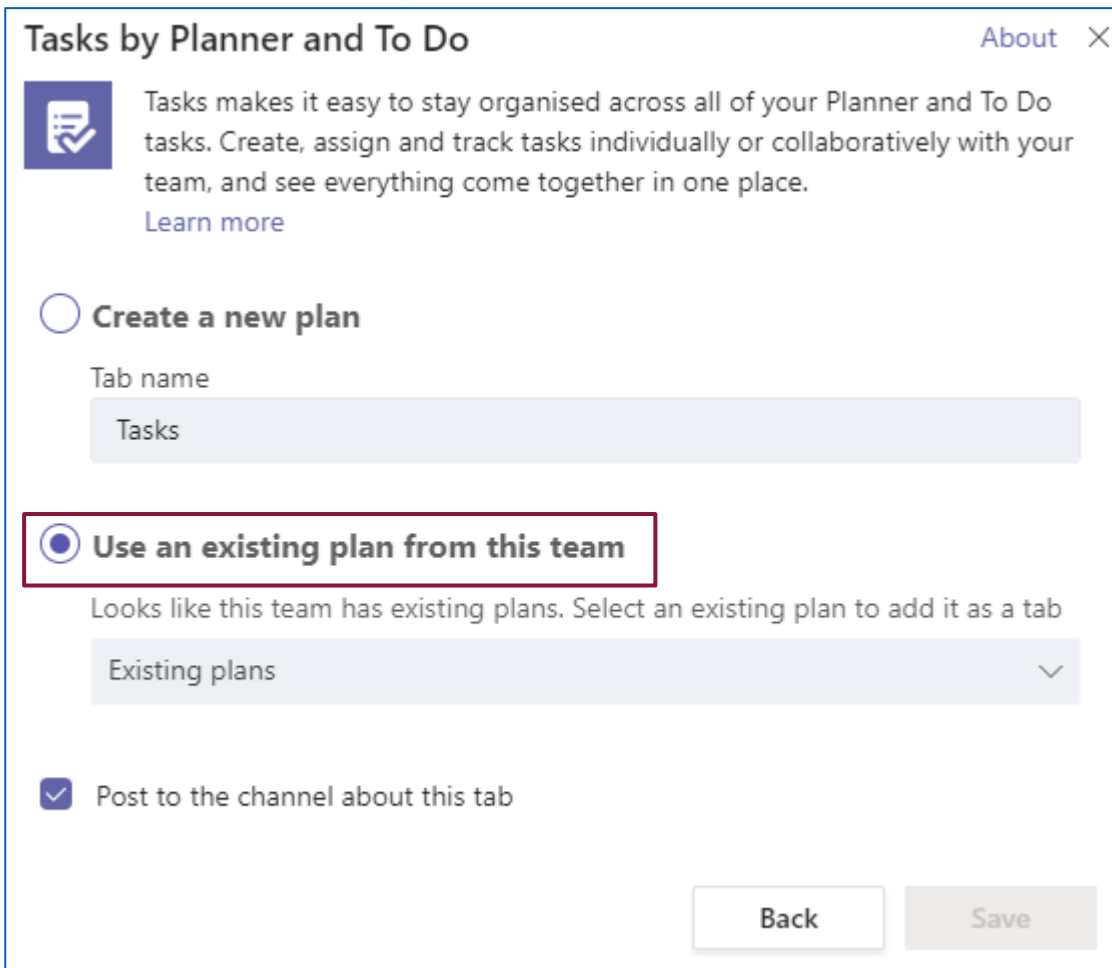
Board Charts Schedule

To do Add new bucket


+ Add task

Use an Existing Plan

- Select [Use an existing plan from this team](#).



Tasks by Planner and To Do About ×

 Tasks makes it easy to stay organised across all of your Planner and To Do tasks. Create, assign and track tasks individually or collaboratively with your team, and see everything come together in one place.
[Learn more](#)

Create a new plan

Tab name
Tasks

Use an existing plan from this team

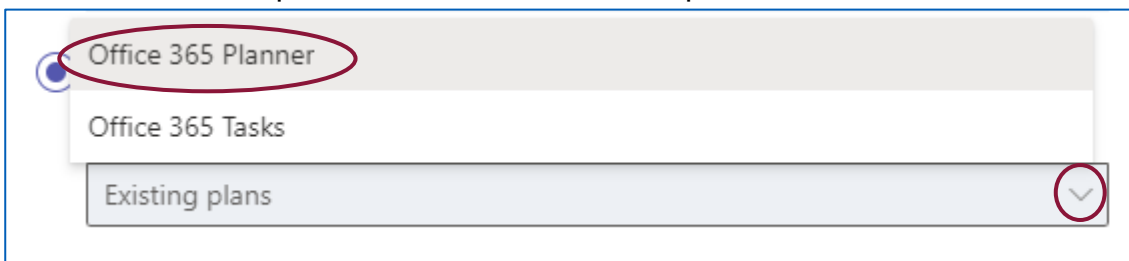
Looks like this team has existing plans. Select an existing plan to add it as a tab

Existing plans ▼

Post to the channel about this tab

Back Save

- Click the drop down arrow and select the plan.

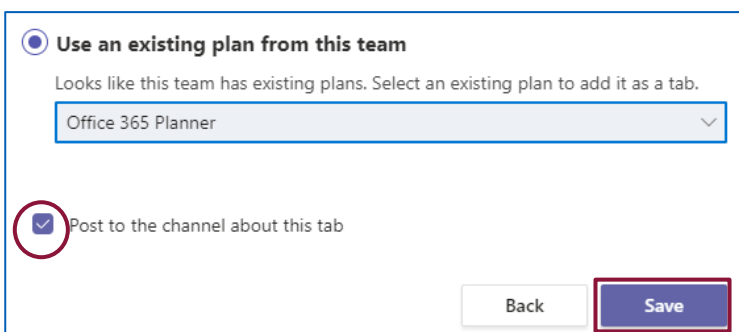


Office 365 Planner

Office 365 Tasks

Existing plans ▼

- Tick/untick [Post to the channel about this tab](#) as required.
- Click [Save](#).



Use an existing plan from this team

Looks like this team has existing plans. Select an existing plan to add it as a tab.

Office 365 Planner ▼

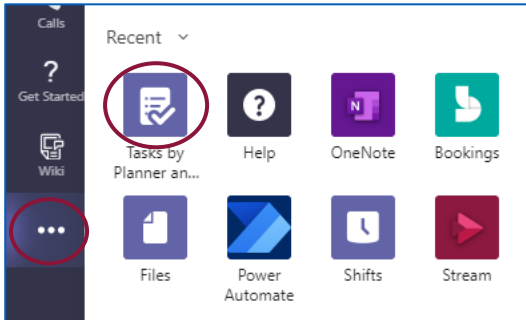
Post to the channel about this tab


Back Save

Add Planner as an App to the Navigation Pane

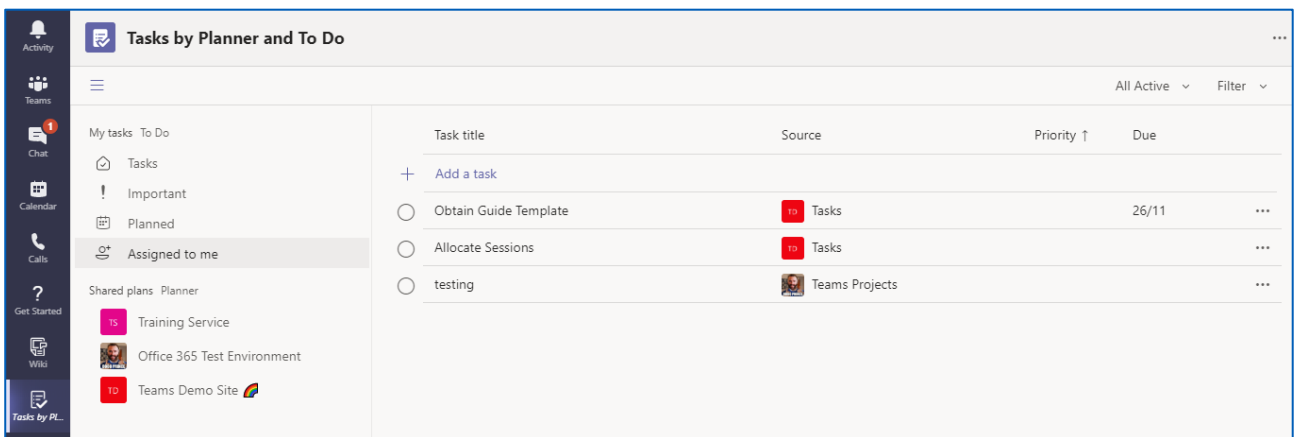
When the App is added to the [Navigation Pane](#), Personal plans can be created and viewed.

- Select the three dots on the [Navigation Pane](#)
- Select [Tasks by Planner and To Do](#)



 If the App doesn't appear or has not been used before, use the [Search](#) function to find it.

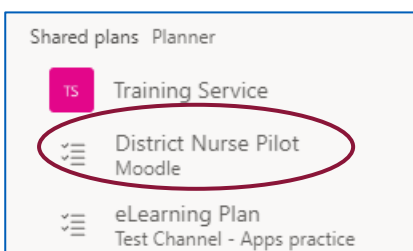
[Tasks by Planner and To Do](#) opens:



- [Assigned to me](#) displays [Tasks](#) assigned to the user
- [Tasks](#) shows those planned by the user themselves.
- [Important](#) shows tasks marked as important by [Priority](#).
- [Planned](#) shows tasks that are planned for the future.

To view a [shared plan](#), select the [Team](#) in which the plan sits. The list of plans will be displayed.

Select the plan to view.

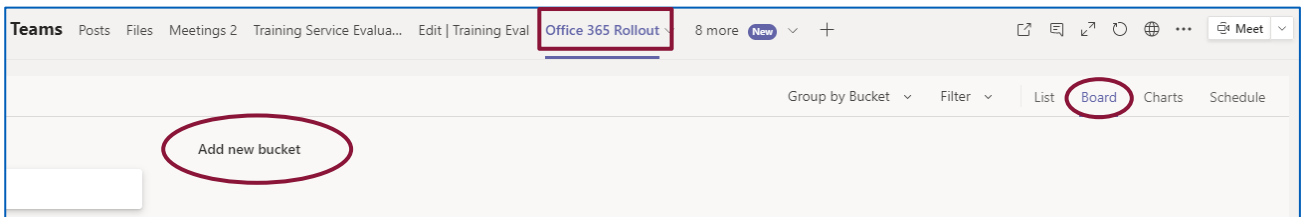


Board View - Add Buckets and Assign Tasks

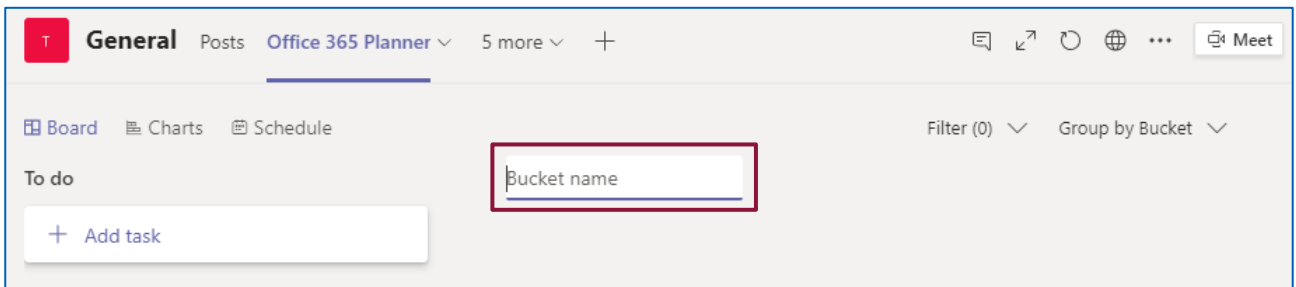
Once a Planner tab has been created, buckets can be added and tasks can be assigned to users. Task priority, completion due dates and progress markers can be set to manage tasks and monitor progress. In each plan, there is always a default bucket called **To do** and this is effectively, a to do list and can be renamed or deleted as required. Buckets are used to organise tasks into things like work streams, project phases or topics and the number of buckets per plan is unlimited.

Add a New Bucket

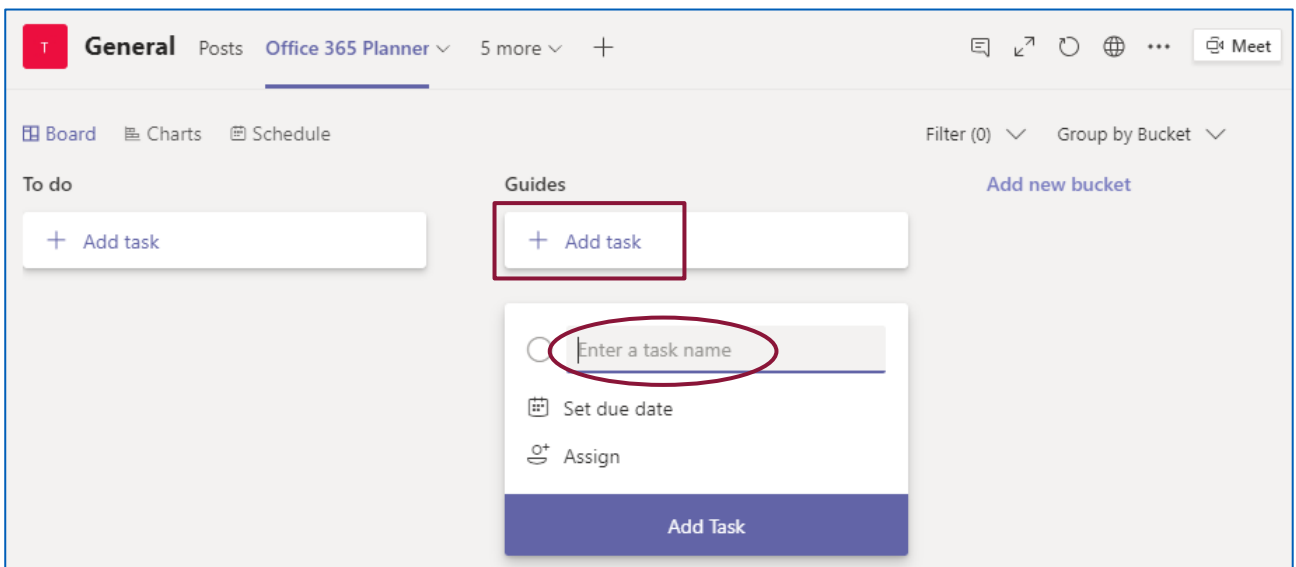
- Go to the **Planner tab** → ensure **Board** view is selected → click **Add new bucket**.



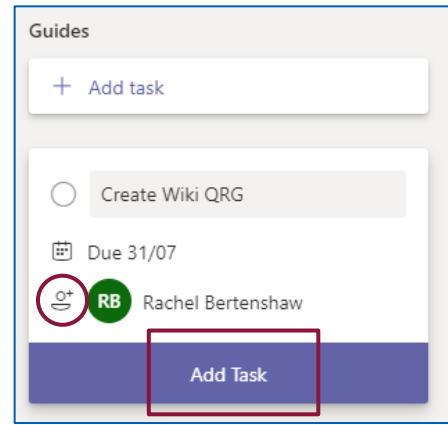
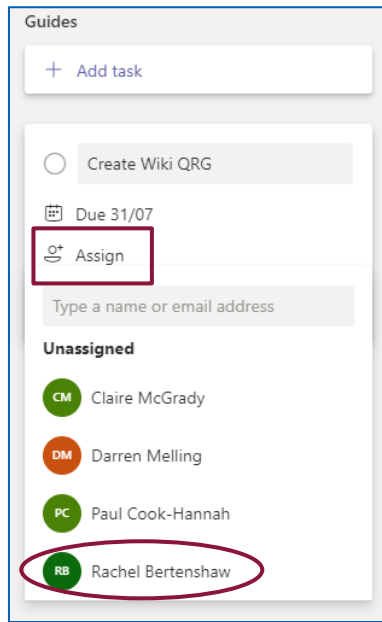
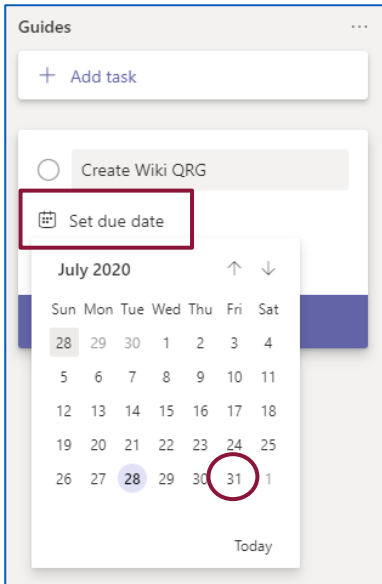
- Type in the **Bucket name** → press **enter**.



- Click **+ Add task** → **Enter a task name**.



- Click **Set due date** → select a date.
- Click **Assign** → select the name of the person(s) to assign the task to from the Team list.
- Click on the **Assign** icon to close the Assign box → click **Add Task**.



If a task is to be assigned to a person who is not a member of the Team; this must only be done by a [Team Owner](#).



It is important to note that if this happens, the assigned person will automatically be added as a member to the Team and will have full access to all of the channels, posts and files associated with your Team.

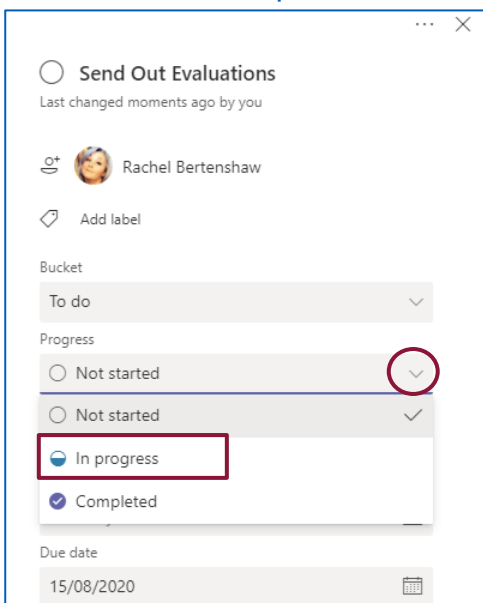
Additional Bucket Features

There are other features available in buckets which can be included to organise tasks more efficiently.

- Click the [Task](#) to open it.

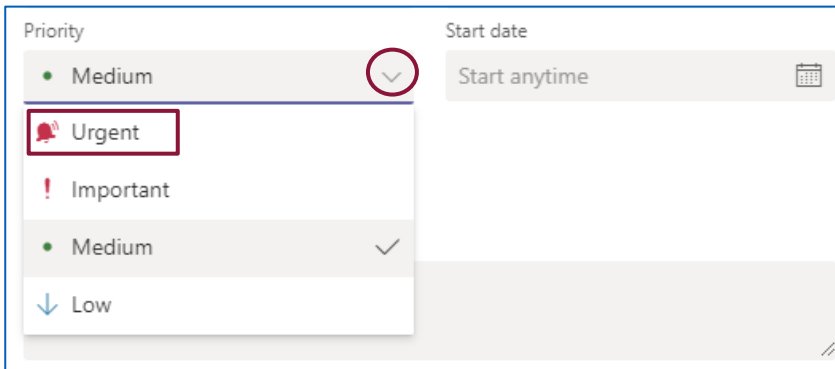
Set Task Progress

- Click the [drop down arrow](#) → select the [Progress](#) stage.



Set Task Priority

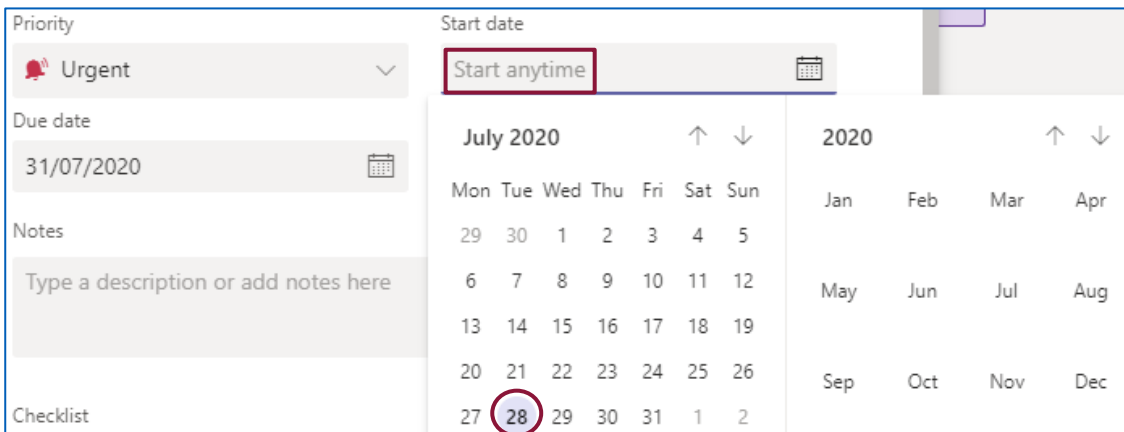
- Click the **drop down arrow** → select the **Priority**.



A screenshot of a task card's priority dropdown menu. The menu is open, showing options: Urgent (with a red bell icon), Important (with a red exclamation mark icon), Medium (with a green dot icon), and Low (with a blue downward arrow icon). The 'Urgent' option is highlighted with a red box. A red circle highlights the dropdown arrow on the 'Medium' option in the background. To the right, the 'Start date' field is visible with the text 'Start anytime' and a calendar icon.

Set the Start Date

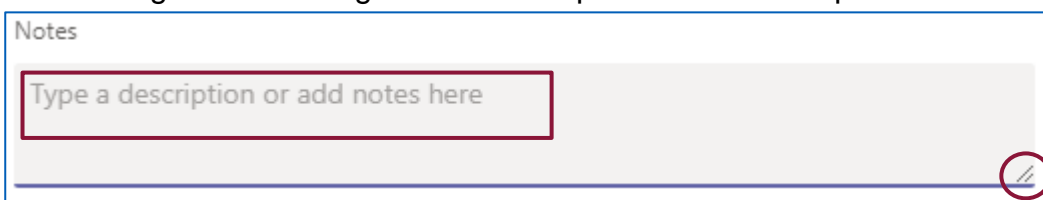
- Click **Start date** → select the start date from the calendar.



A screenshot of a task card's start date selection interface. The 'Start date' field is highlighted with a red box and contains the text 'Start anytime'. Below it, a calendar for July 2020 is displayed. The date '28' is circled in red. To the left, the 'Due date' field shows '31/07/2020'. Below the calendar, there is a 'Notes' section with a text input field containing the placeholder 'Type a description or add notes here' and a 'Checklist' section.

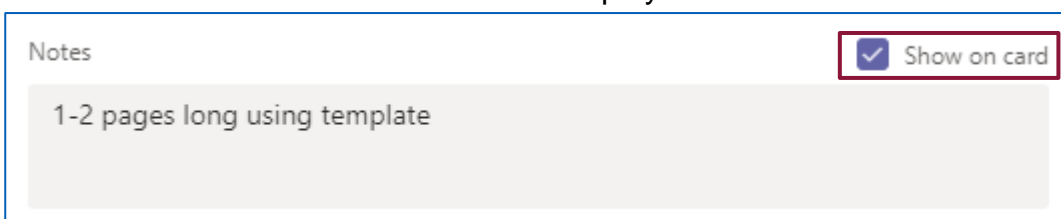
Add Notes

- Click the **Notes** box and type in relevant text.
- Drag the bottom right corner to expand the box if required.



A screenshot of the 'Notes' section of a task card. It features a large text input field with the placeholder text 'Type a description or add notes here'. A red box highlights this input field. A red circle highlights the bottom right corner of the notes area, indicating where to drag to expand the box.

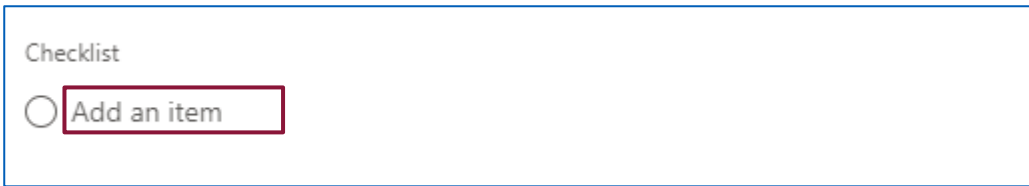
- Click **Show on card** checkbox to display the **Notes** on the Task.



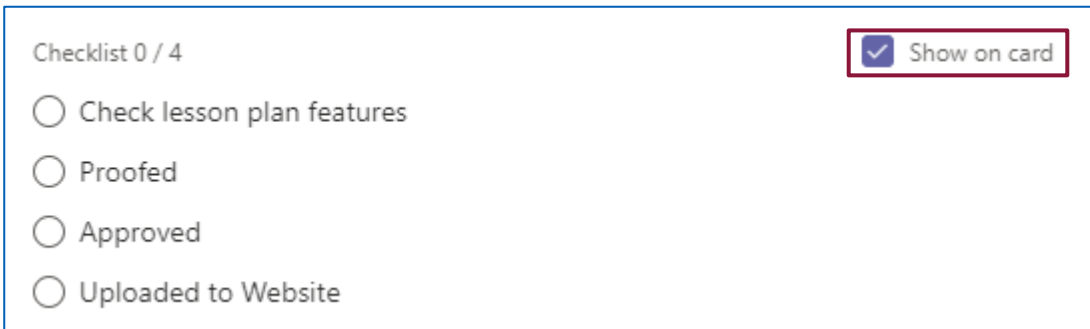
A screenshot of the 'Notes' section of a task card. The text '1-2 pages long using template' is visible in the notes field. A red box highlights the 'Show on card' checkbox, which is checked.

Create a Checklist

- Click [Add an item](#) → type text → press [Enter](#).



- Repeat as required until checklist is complete.
- Click [Show on card](#) checkbox to display the [Checklist](#) on the Task.

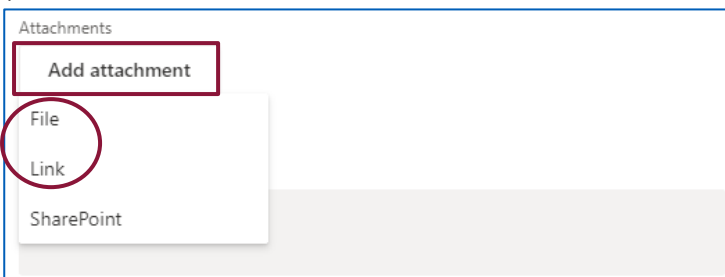


Only one section can [Show on card](#) at a time – choose between [Notes](#) or [Checklist](#).

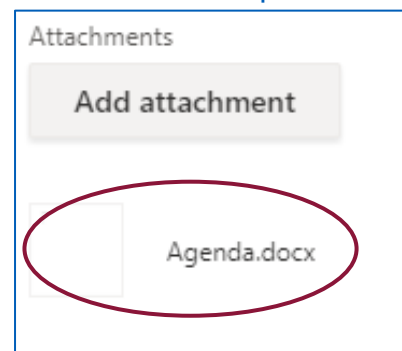
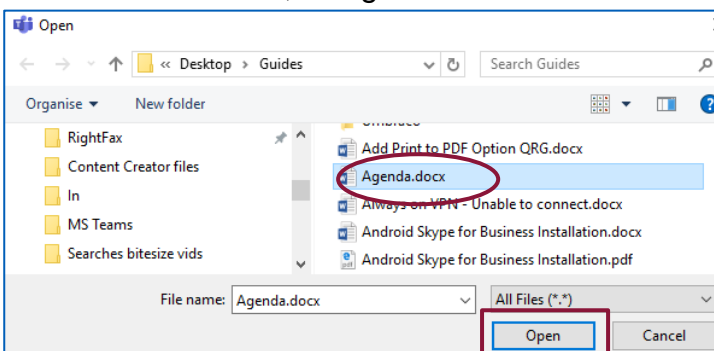
Add an Attachment

- Click [Add attachment](#) and choose from:
 - [File](#) – to attach a file.
 - [Link](#) – to link to a file.

(Do not use SharePoint until Office 365 has been fully implemented)



- To add a [File](#), navigate to the file location → select file → click [Open](#).



- To add a [Link](#), enter the [Address](#) → add the [Text to display](#) → click [Save](#).

Add Comments

- Click the [Comments](#) box → type a message → click [Send](#).

The Comment is added at the bottom of the task and more detail can be added as required.

Add a Label

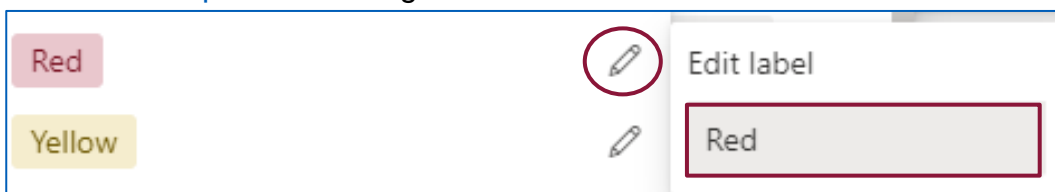
Tasks can have labels added which will provide another method to group and filter across buckets. Label default names are colours but these can be changed as required.

- Select the [Task](#)
- Select the [Add Label](#)

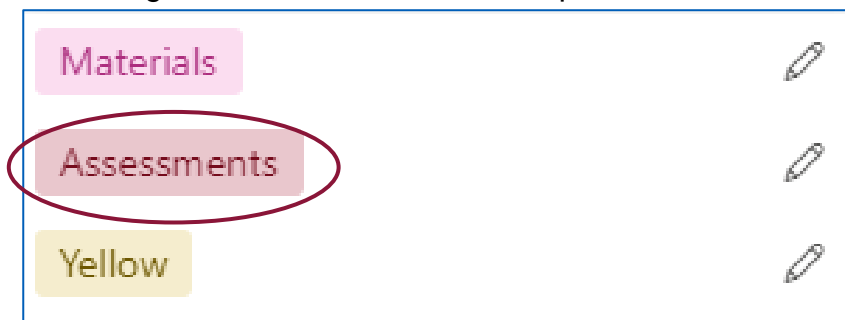
- Select the colour of the **label** to add



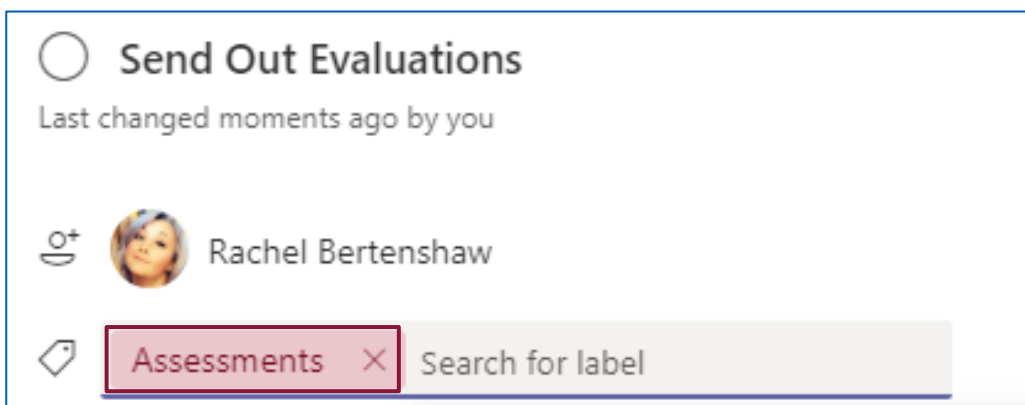
- Select the **pencil** to change the name of the label



- Change the name of the label and press **Enter**.



- Select the **label** to add it to the Task.



Update a Task

- Click the **Task** to be updated → complete the relevant section → click the **X** to **close**.

Create Wiki QRG
Last changed moments ago by you

RB Rachel Bertenshaw

Bucket: Guides | Progress: In progress

Priority: Urgent | Start date: 24/07/2020

Due date: 28/07/2020

Notes: 1-2 pages long using template Show on card

Checklist 2 / 4 Show on card

- Check lesson plan features
- Proofed
- Approved
- Uploaded to website
- Add an item

Attachments: Add attachment

Agenda.docx

Progress – when marked as **Completed** the task will move to the **Show completed** section of the Bucket.

Checklist – click the items that have been completed and they will be crossed off the list.

Assign a Task to Multiple People

- Click the **Assign** icon → select the name(s) required.

Type a name or email address

Assigned

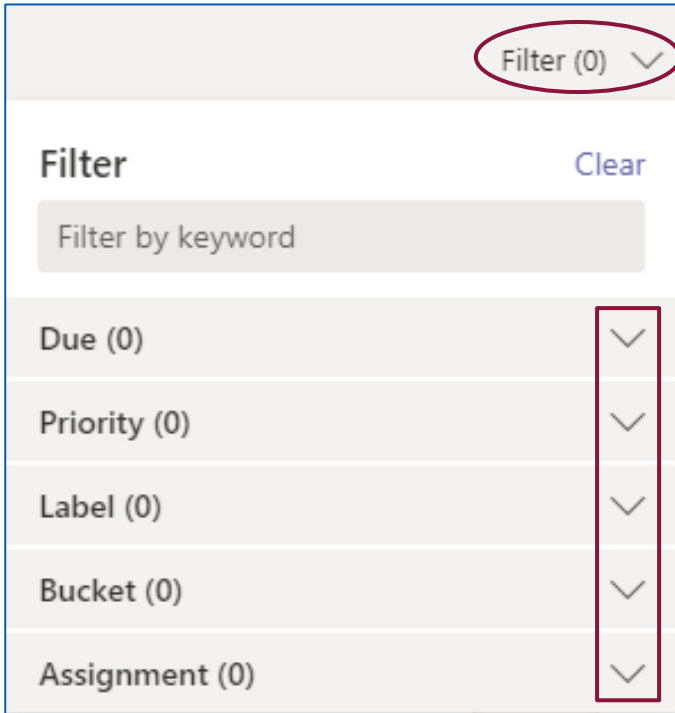
- PC** Paul Cook-Hannah X
- RB** Rachel Bertenshaw X
- DM** Darren Melling X

Use Filters and Groups

Tasks can have filters added and the group option can be changed to help monitor progress and to provide a different view of the plan.

Add a Filter

- Click the [drop down arrow](#) next to [Filter](#).
- Click the [drop down arrow](#) next to the [Filter Option](#) → select a [Filter Type](#).



[Filter by Keyword](#) – type in the word(s) found in the task name to filter by.

[Due](#) – select an option from the list (Late, Today, Tomorrow, This week, Next week, Future or No date set).

[Priority](#) – select an option from the list (Urgent, Important, Medium or Low).

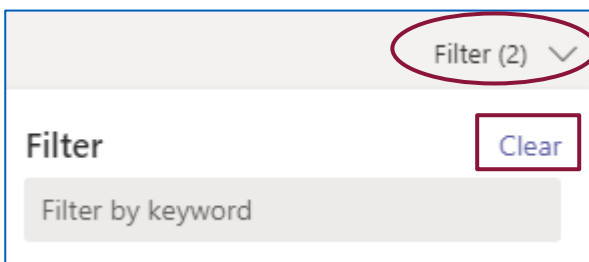
[Label](#) – select one of the 6 coloured labels.

[Bucket](#) – select from the list of available buckets.

[Assignment](#) – select an option from the list which also includes Unassigned.

Remove a Filter

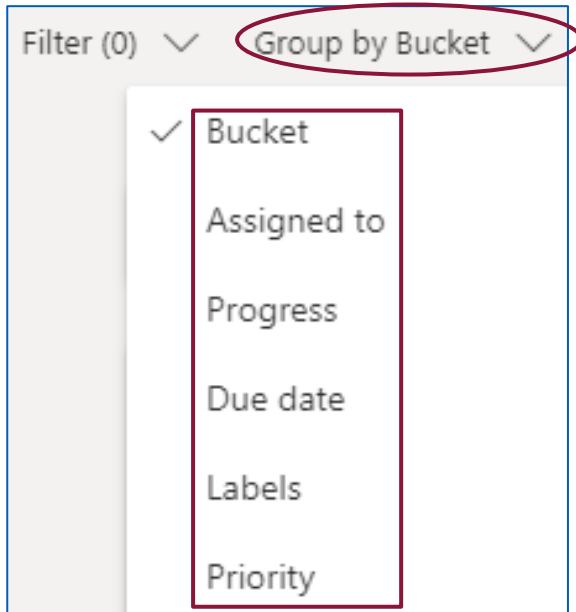
- Click [Filter](#) → select [Clear](#).



Change the Group Option

The default group option is [Group by Bucket](#) but this can be changed as required.

- Click the [drop down arrow](#) next to [Group by Bucket](#).
- Select an option to [Group by](#).



[Assigned to](#) – select this option to group by person.

[Progress](#) – select an option from the list (Not started, In Progress or Completed).

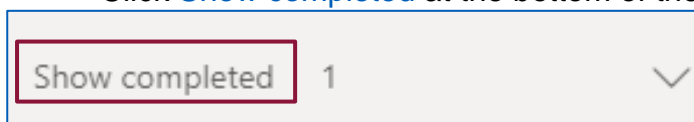
[Due date](#) – select an option from the list (Late, Tomorrow, This week or Future).

[Labels](#) – select one of the six coloured labels.

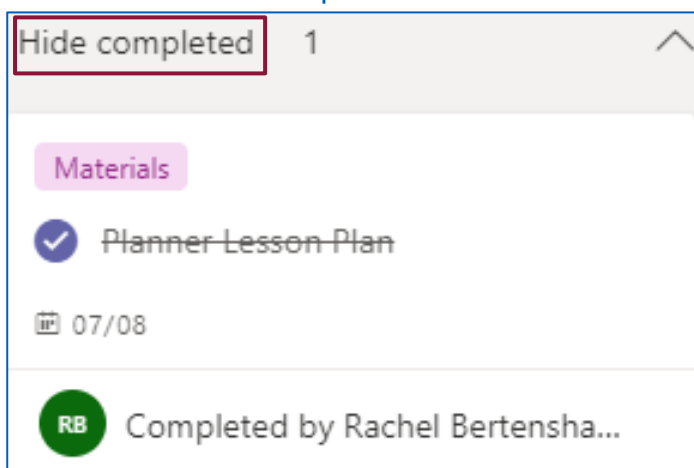
[Priority](#)– select an option from the list (Urgent, Important, Medium or Low).

View Completed Tasks

- Click [Show completed](#) at the bottom of the [Bucket](#).



- Click [Hide Completed](#) to close the view.



Charts

The **Charts** section of Planner automatically creates charts to display the tasks. The charts are created for each group option and individual filters can be applied to enable further analysis. To the right of the charts, the buckets are visible and they can be expanded so that the contents are displayed. **Tasks** can also be added from here if needed.

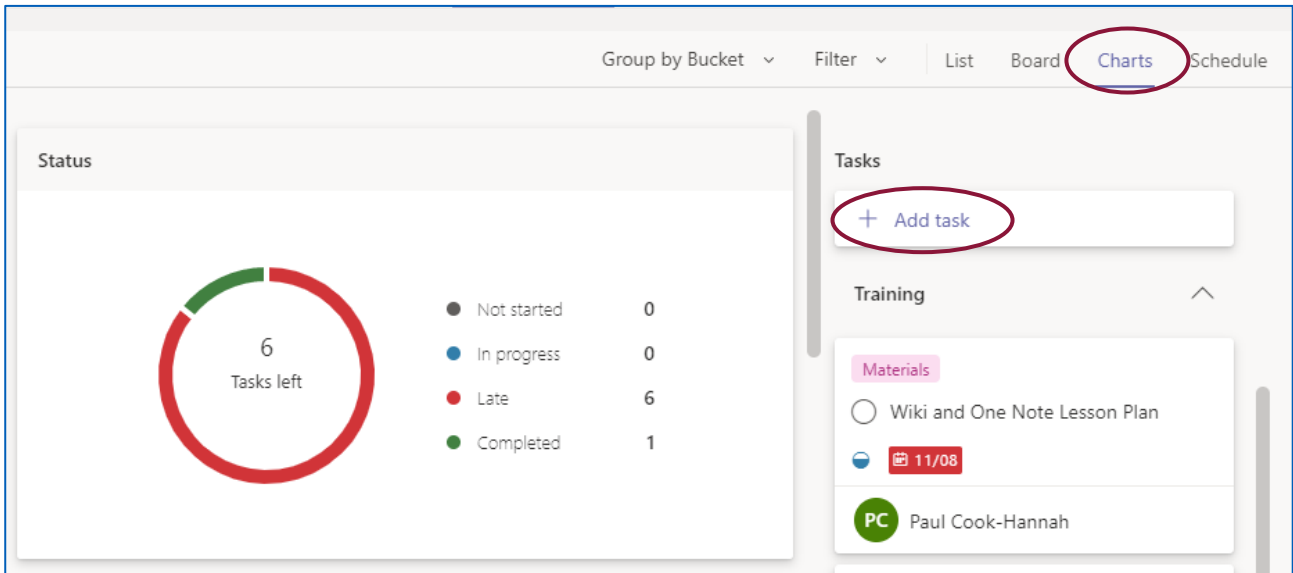


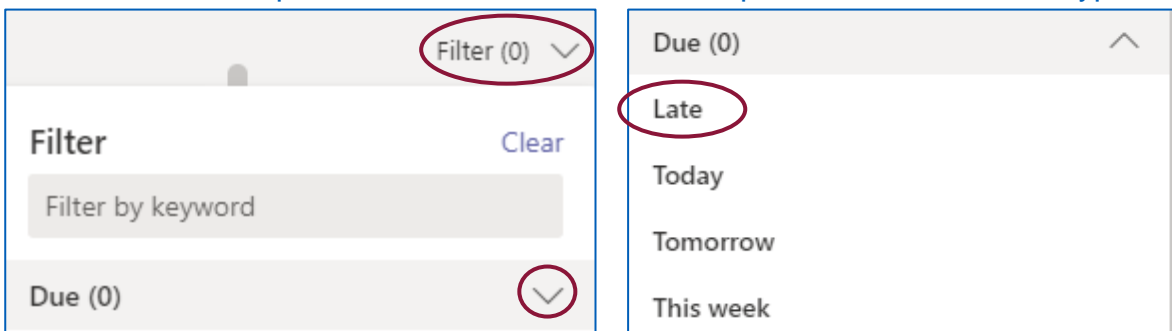
Chart Types

There are several charts available to view:

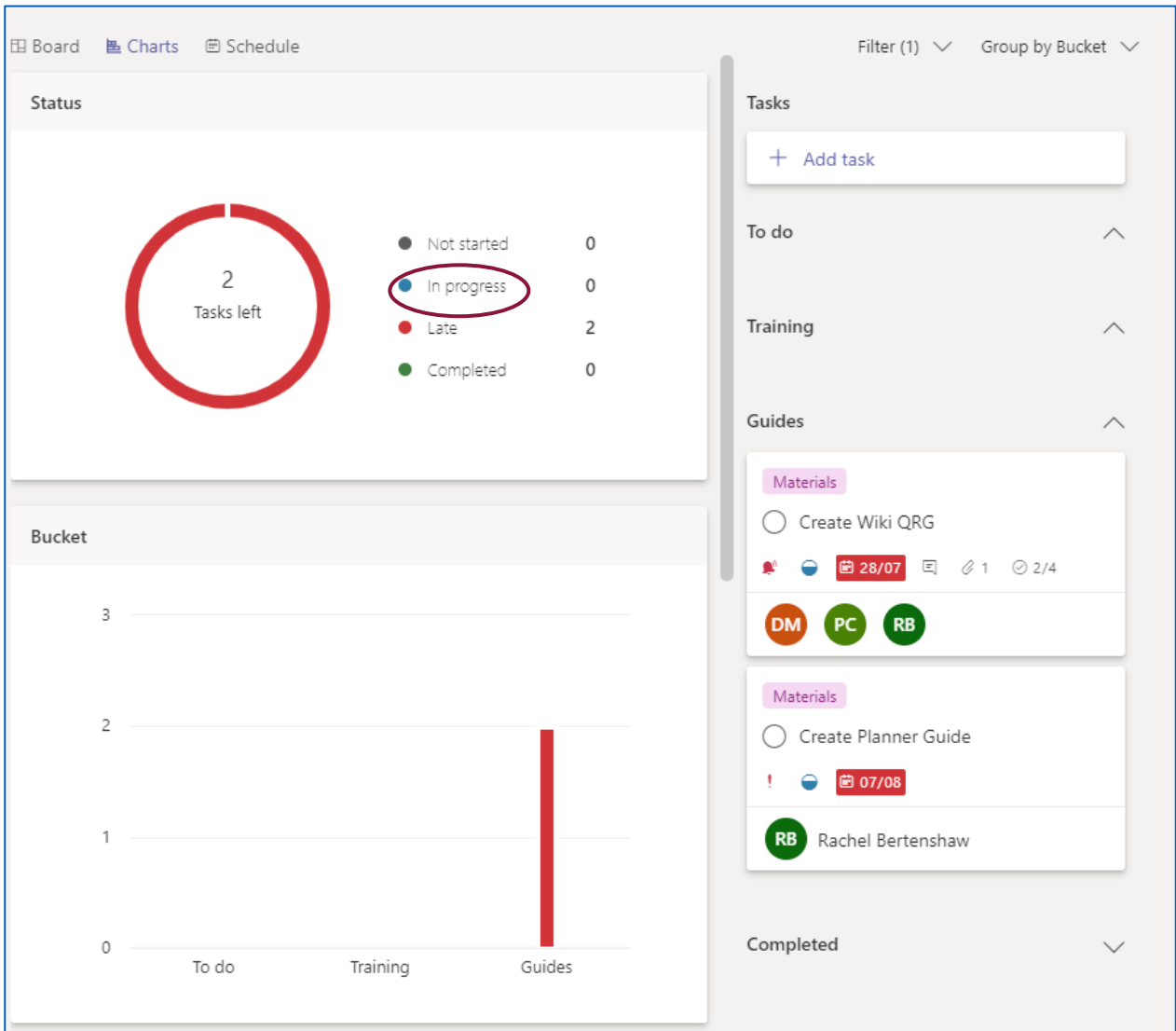
- **Status** – displays the status of the tasks and includes progress.
- **Bucket** – displays the tasks by bucket and includes progress.
- **Priority** – displays the tasks in order of priority and includes progress.
- **Members** – displays the tasks for each member and includes unassigned and any progress.

Add a Chart Filter

- Click the **drop down arrow** next to **Filter**.
- Click the **drop down arrow** next to the **Filter Option** → select a **Filter Type**.



The charts will update to display the filtered information.



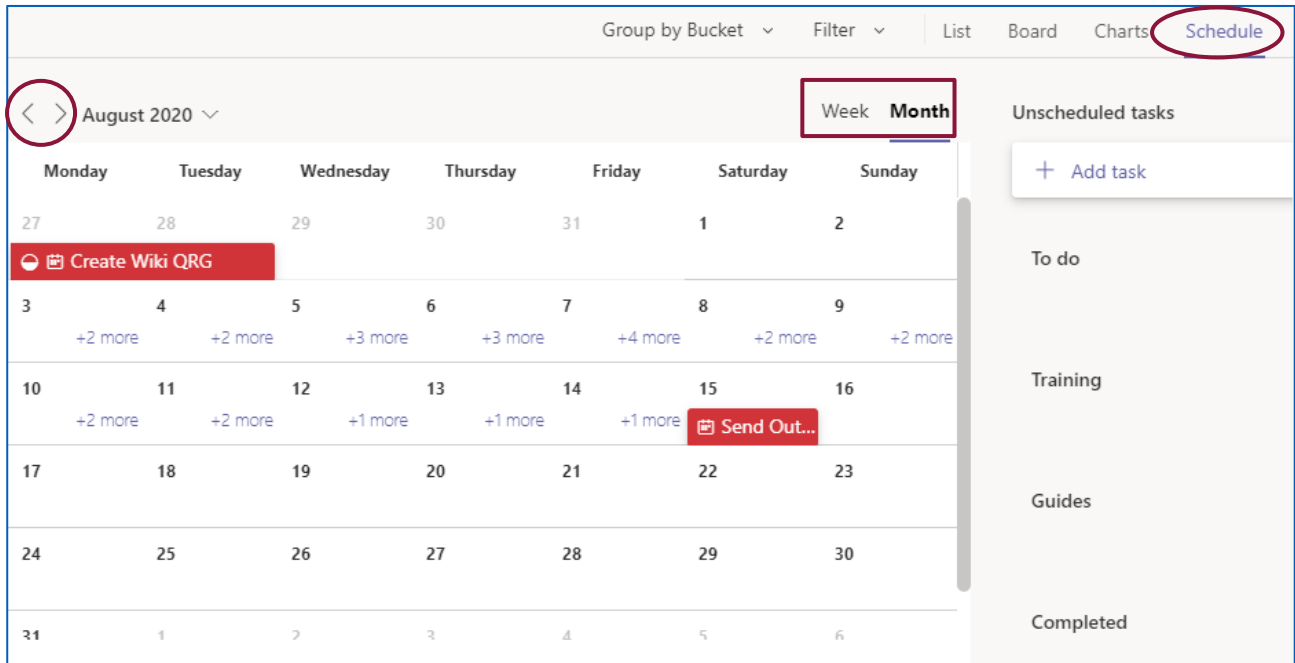
Remove a Chart Filter

- Click [Filter](#) → select [Clear](#).

Schedule

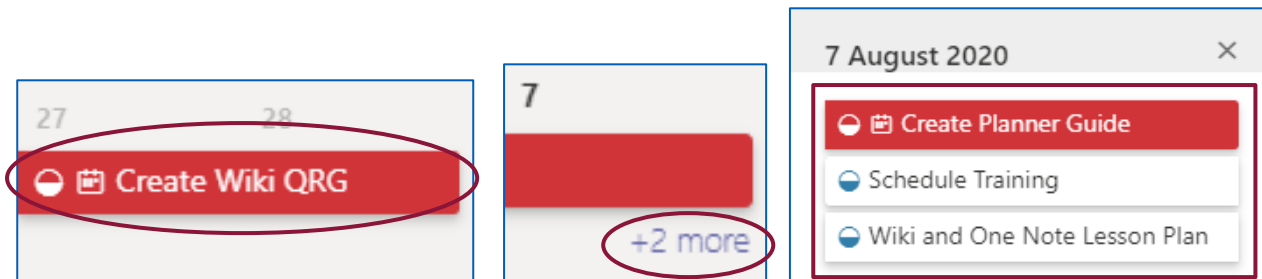
The **Schedule** section displays **Tasks** in a calendar view. Only one task will be displayed in full for each date but there is an option to show more if needed. Any overdue tasks will be displayed in red.

- Click the **arrows** to change the week or month.
- Select **Week** or **Month** view.



Display Tasks

- Click on the **Task** to open it and see more details.
- Click on **+more** to see all tasks for that date.



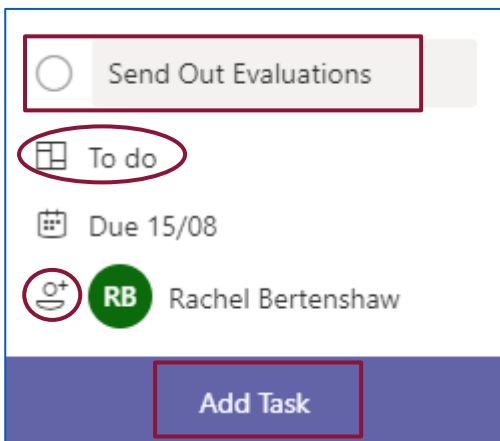
Add a Task in Schedule View

- Select a **Date** for the Task to start and click the **+** icon.



- Enter a **task name** → select a **bucket**.
- Click **Assign** and select a team member → click on the task to save the selections.

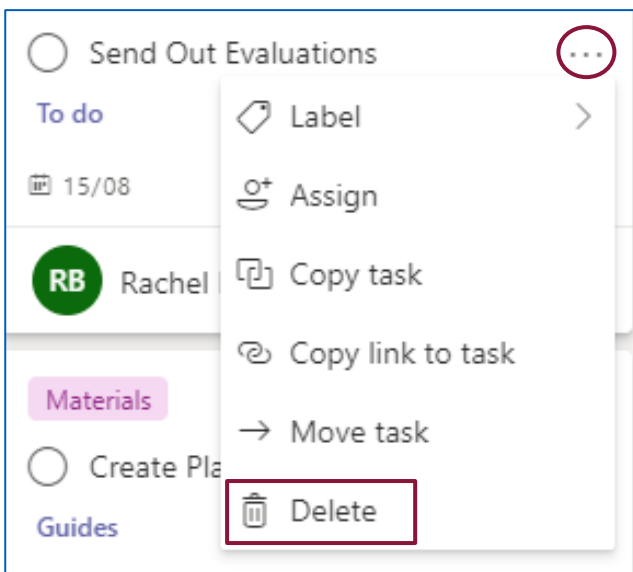
- Click [Add Task](#).



To add further features, open the task and complete the sections as previously described on pages 8-11.

Delete a Task

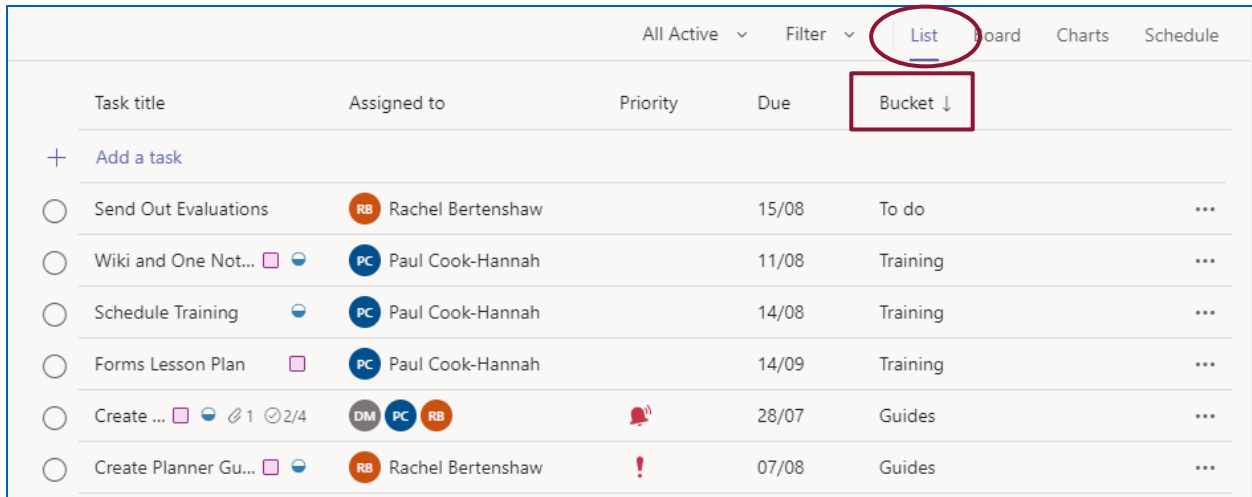
- Click the [3 Dots](#) in right corner of the task → select [Delete](#).



List

The **List** view allows all tasks to be listed down the screen. These can then be sorted by headings as well as being filtered out.

- Select **List**.
- Select the **Header** to sort by that particular category



All Active ▾ Filter ▾ List Board Charts Schedule					
Task title	Assigned to	Priority	Due	Bucket ↓	
+ Add a task					
<input type="radio"/> Send Out Evaluations	Rachel Bertenshaw		15/08	To do	...
<input type="radio"/> Wiki and One Not...	Paul Cook-Hannah		11/08	Training	...
<input type="radio"/> Schedule Training	Paul Cook-Hannah		14/08	Training	...
<input type="radio"/> Forms Lesson Plan	Paul Cook-Hannah		14/09	Training	...
<input type="radio"/> Create ... 1 2/4			28/07	Guides	...
<input type="radio"/> Create Planner Gu...	Rachel Bertenshaw		07/08	Guides	...

Contact Details

System Queries	Informatics Merseyside System Support & Development Team	0151 296 7777
IT Queries	Informatics Merseyside IT Service Desk	0151 296 7777
Training Queries	Informatics Merseyside Training Service	training@imerseyside.nhs.uk