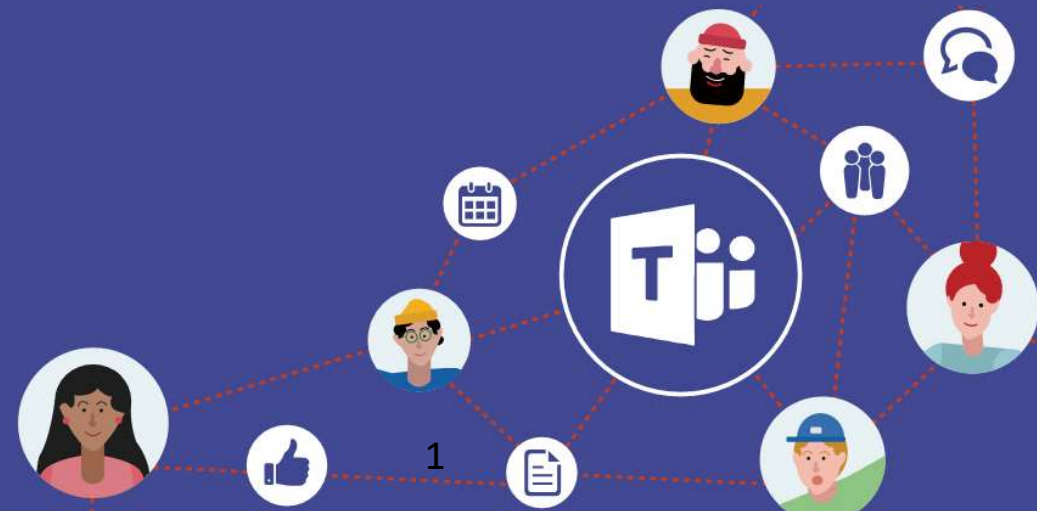


Tasks Explanation Handout

WorkingSm@rt with Microsoft TEAMS Training

WorkingSm@rt®
MICROSOFT
+ Teams



Tasks in TEAMS – 3 Sources

1. Own Tasks from Posts/Chats
2. Own Tasks from Outlook
3. Shared Tasks in Channels e.g. Projects + Meetings

Using 'Planner' App

1. Own Tasks from Posts/Chats

The screenshot shows a Microsoft Teams chat window. At the top, the channel name is 'General' and the 'Posts' tab is selected. A message from Tim Gunning, dated 09:43 and edited, contains the text 'Progress Report' and 'Please can you add your update to the Report linked by 6/7/20'. Below the text is a document attachment titled 'Progress report.docx'. A blue callout bubble with the text 'Create a Task from a Post' points to the 'More actions' menu. This menu is open, showing options like 'Save this message', 'Edit', 'Delete', and 'Create task'. The 'Create task' option and the 'More actions' button at the bottom of the menu are highlighted with red boxes.

1. Own Tasks from Posts/Chats

The screenshot shows a Teams chat window with a task creation modal open. The modal has a blue header with a plus sign and a close button. Two blue callout boxes are overlaid on the modal:

- 1.Edit Subject (+ Deadline date in brackets)**: Points to the 'Notes' field.
- 2.Add Due date**: Points to the 'Due date' field.

The modal contains the following fields and options:

- Suggest a theme**: Radio button.
- Create in**: Dropdown menu with 'Tasks' selected.
- Priority**: Dropdown menu with 'Medium' selected.
- Due date**: Calendar icon.
- Notes**: Text area containing:
 - Tim Gunning in Test Office Party for WorkingSm@rt training/10 Entertainment at 5 June 2020, 10:09 am:
 - Suggest a theme
 - Please make a suggestions
 - <https://teams.microsoft.com/l/message/19:c82b2b19b1964decad8f94ccbf18fdcf@thread.skype/1591348160833?tenantId=77e3846d-6c48-4f5b-80cd-381d2adaa31e&groupId=1150fb8f-2c9a-4d15-80e0-5b1023bd4e29&parentMessageId=1591348160833>
- Add Task**: Blue button at the bottom right.

On the right side of the chat, a menu is open with the following options:

- Save this message
- Edit
- Delete
- Mark as unread
- Copy link
- Share to Outlook
- Translate
- Immersive Reader
- Pin
- Turn off notifications
- More actions** (highlighted with a red box and a right arrow)

At the bottom of the chat, there are buttons for 'Create a new poll', 'Create task', and 'Create work item'. The 'Create task' button is also highlighted with a red box.

Important	Do Today	Date Activate
Not Important	Delegate	Delete
	Urgent	Not Urgent

1. Own Tasks from Posts/Chats

1. Edit Subject
(+ Deadline date in brackets)

2. Add Due date = Action Date

The screenshot shows a Teams chat window with a message from Tim Gunning. A task creation dialog is open over the message. The dialog has a 'Suggest a theme' button (circled in red), a 'Create in' dropdown set to 'Tasks', a 'Priority' dropdown set to 'Medium', and an empty 'Due date' field (circled in red). The 'Notes' section contains the message text and a URL. On the right, a menu is open with the 'Create task' button (circled in red) highlighted. A blue callout bubble points to this button with the text 'Create a Task from a Post'. At the bottom right of the dialog, an 'Add Task' button is also circled in red.

Ex4

2. Own Tasks from Outlook

The screenshot shows the Outlook interface with the 'View' tab selected in the ribbon. The 'View' ribbon includes options for 'Current View' (Change View, View Settings, Reset View), 'Arrangement' (Day, Work Week, Week, Month, Schedule View, Overlay, Working Hours), 'Color' (Time Scale, Color), and 'Use Tighter Spacing' (Daily Task List, Folder Pane, Reading Pane, To-Do Bar). The 'Daily Task List' dropdown is set to 'Normal'. The main calendar area shows the dates 26-30 December 2022. Below the calendar, the 'Tasks' pane is visible, showing a list of tasks: 'Presentation Overview', 'Project Report', 'Ask John for Presentatio...', and 'John - submitted presen...'. A blue callout box points to the 'Tasks' pane with the text 'Tasks in Outlook under Calendar'.

Ex4



3. Shared Tasks in Channels

Add 'Planner' Tab in Channels

The screenshot shows the Microsoft Teams interface for a channel named 'Learning Materials'. The 'Tasks' tab is selected and highlighted with a red box. In the left-hand navigation pane, the 'Teams' icon is also highlighted with a red box, and the 'Learning Materials' team is selected. The main content area displays task lists for three users: Maria Fontes, John Reece, and Anna. Each user's task list has a red box around the '+ Add task' button. A blue callout bubble with the text 'Add task' points to the button in Maria Fontes's task list. The interface also shows a search bar at the top, a 'Meet' button, and various view options like 'Group by Bucket', 'Filter', 'List', 'Board', 'Charts', and 'Schedule'.

Add 'Planner' as Tab (in any Channel apart from Private)

The image shows a Microsoft Teams channel interface for a channel named "30 Budget". The channel header includes tabs for "Posts", "Files", and "Wiki", followed by a plus sign icon. A blue callout bubble points to this plus sign with the text "Click + to add Tabs". Below the channel header, the "Add a tab" dialog is open. It features a search bar and a list of available apps. The "Planner" app icon, which consists of two overlapping squares (one purple, one blue), is highlighted with a red square. A blue callout bubble points to this icon with the text "Click on 'Planner' App". Other visible app icons include Wiki, Excel, Cisco Webex Meetings, Document Library, Forms, Lists, Miro, OneNote, PDF, Polly, Power Automate, Power BI, and PowerPoint.

Add 'Planner' as Tab (in any Channel)

30 Budget Posts Files Wiki +

Click + to add Tabs

Planner About ×

Create a new plan

Tab name

Party Budget Actions

Use an existing plan from the channel

Looks like this team has existing plans. See

Existing plans

Post to the channel about this tab

Back Save

Name!
NB unique names:
Team +Channel
+“Actions”

Shared Tasks: Add Tab in each Channel

30 Budget Posts Files Wiki +

Click + to add Tabs

Add a tab ×

Turn your favorite apps and files into tabs at the top of the channel

More apps

Recent ▾

Tasks by Planner and To Do Wiki Excel Cisco Webex Meetings Document Library Forms Lists

OneNote PDF Polly Power Automate Power BI PowerPoint

Click on 'Tasks by Planner and To Do' App

Shared Tasks: Add Tab in each Channel

30 Budget Posts Files Wiki +

Tasks by Planner and To Do About X

Tasks makes it easy to stay organized across all 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
Party Budget Actions

Use an existing plan from

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

Change Name!
NB unique names:
Team +Channel
+ "Actions"

Ex4

Priority® Shared Tasks: Group in 'Buckets'

A Better Way To Work

The screenshot shows a dashboard for 'Party Gen Actions' with three columns: 'Late', 'Today', and 'This week'. Each column has an 'Add task' button and a task card. The 'Late' task is assigned to Tim Gunning with a due date of 28/07. The 'Today' task is assigned to Priority Management Operations with a due date of 29/07. The 'This week' task is assigned to Tim Gunning with a due date of 31/07. A red box highlights the 'Party Gen Actions' dropdown menu in the top navigation bar.

Collaborate with Shared Tasks

Assign and Date

Visible by all in the TEAM

Planner Tab - Monitor progress

The screenshot displays the 'Party/Learning Actions' tab in the Priority Planner. The interface includes a top navigation bar with 'Learning Materials', 'Posts', 'Files', 'Wiki', and 'Party/Learning Actions' (highlighted with a red box). Below this is a secondary navigation bar with 'Group by Due date', 'Filter', 'List', 'Board', 'Charts' (highlighted with a red box), and 'Schedule'. The main content area is divided into three sections: 'Status', 'Bucket', and 'Tasks'. The 'Status' section (highlighted with a red box) features a donut chart showing '3 Tasks left' and a legend with the following data:

Status	Count
Not started	2
In progress	0
Late	1
Completed	0

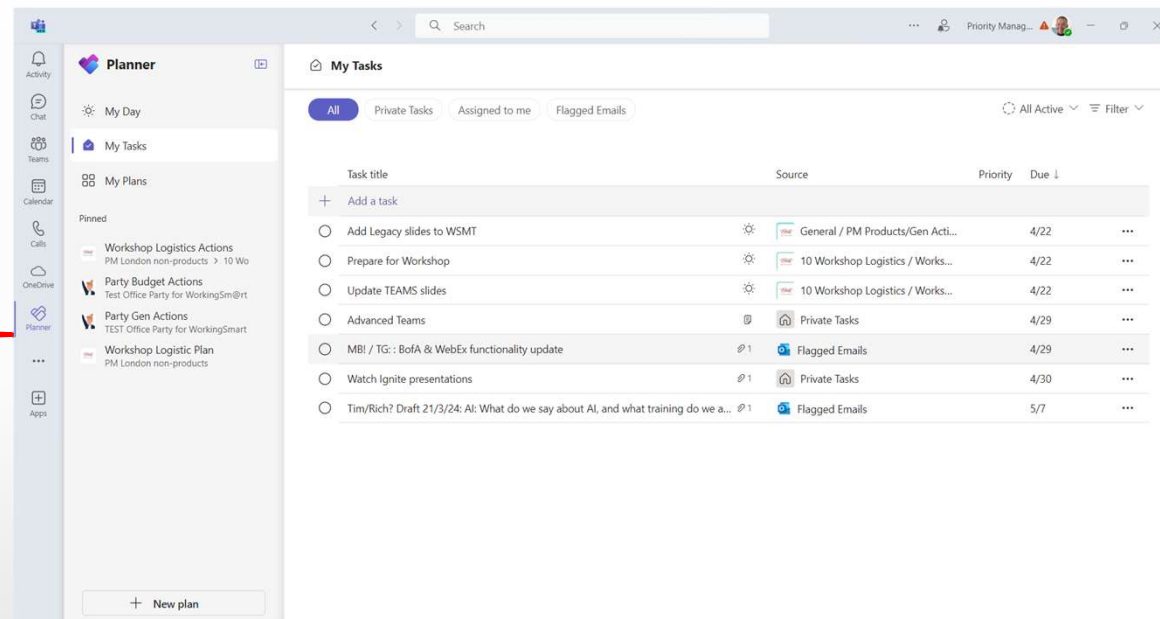
The 'Bucket' section shows a bar chart with two categories: 'To do' and 'Meeting Actions'. The 'To do' bucket has a value of 3, and the 'Meeting Actions' bucket has a value of 1. The 'Tasks' section (highlighted with a red box) lists tasks, with one task highlighted as 'Late':

- Review Party Budget (Meeting Actions, Due: 03/22)
- Review Q1 Presentation (To do, Due: 05/11)

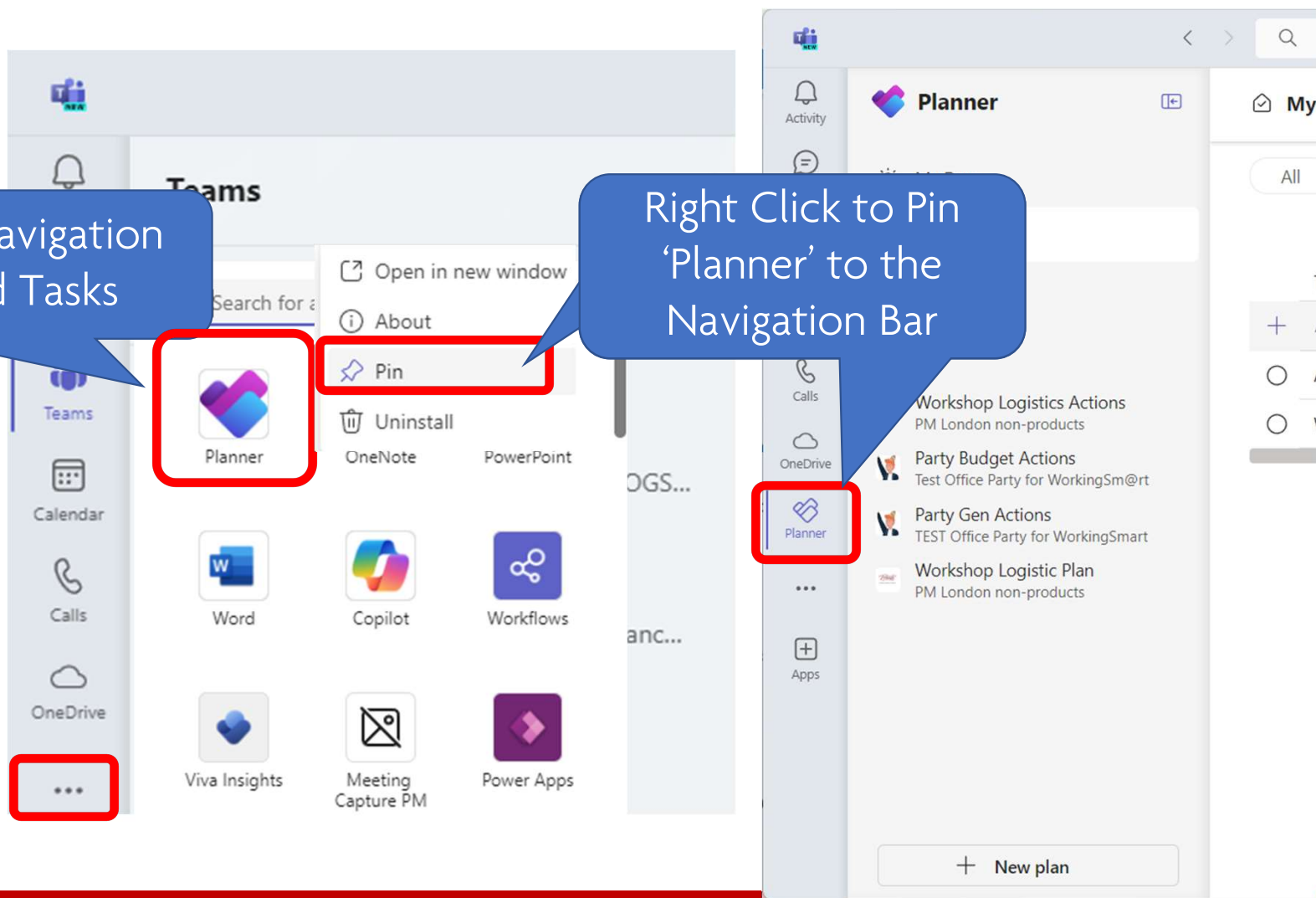
Two blue callout boxes are present: 'Tasks Status' points to the donut chart, and 'Late Task' points to the 'Review Party Budget' task card.

'Planner' Overview ALL Tasks in one place

1. Own Tasks from Posts/Chats
2. Own Tasks from Outlook
3. Shared Tasks in Channels



Tasks on Navigation Bar – Using Desktop App Version



Add 'Planner' App on Navigation Bar for Own + Shared Tasks

Right Click to Pin 'Planner' to the Navigation Bar

Ex4

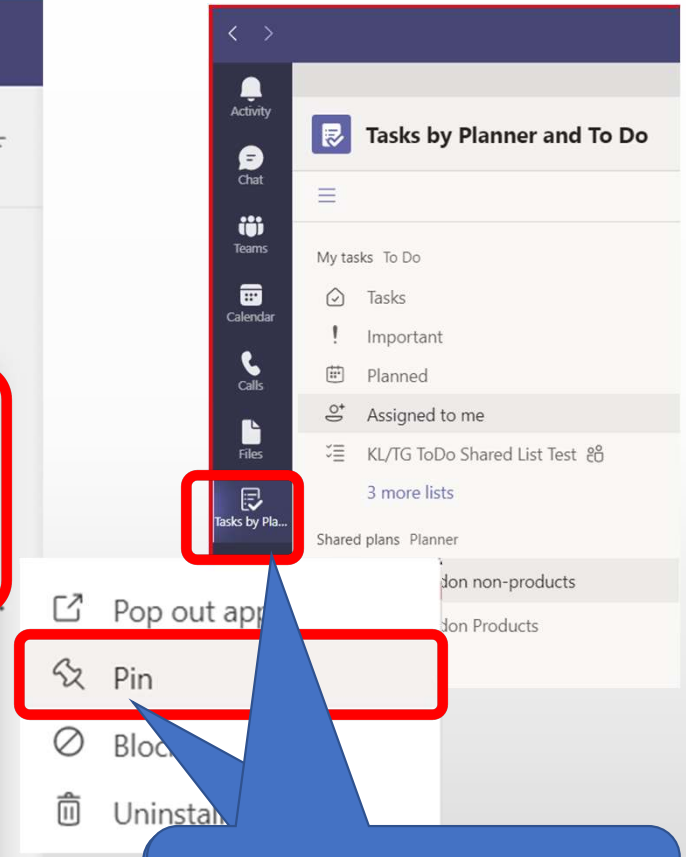
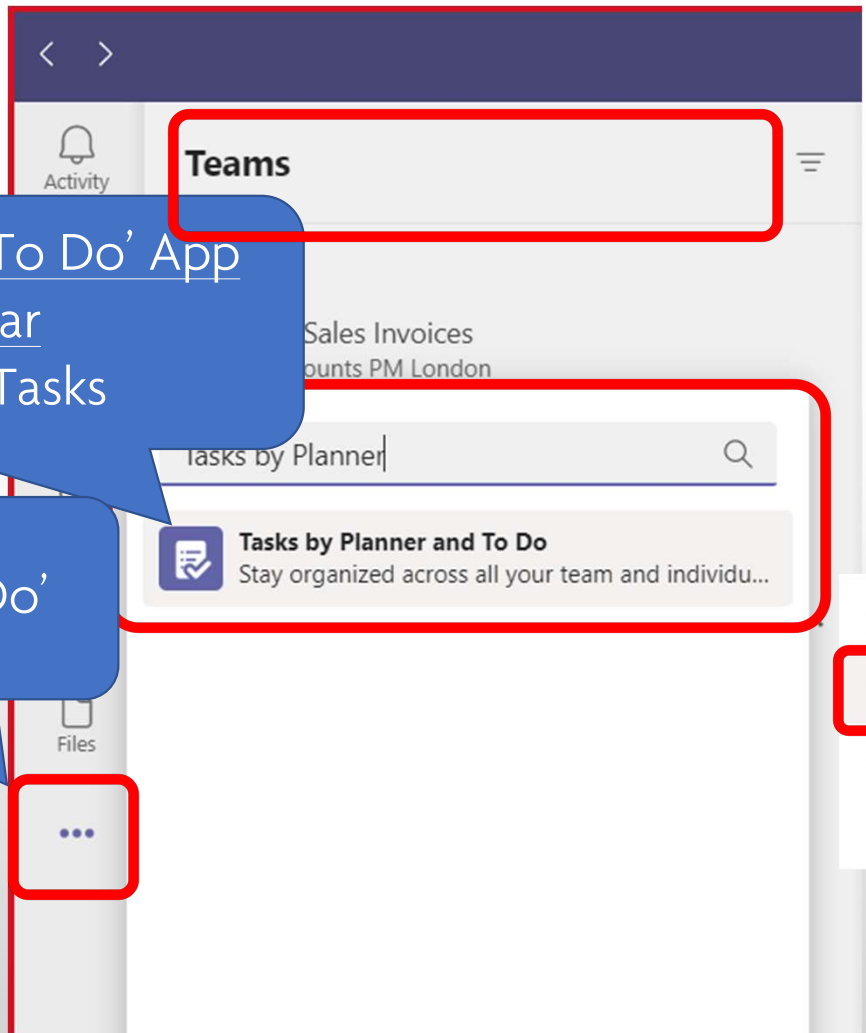


Overviews: Pin 'Tasks by Planner & To Do ...' on Navigation Bar

A Better Way To Work

Add 'Tasks by Planner & To Do' App on Navigation Bar for Own + Shared Tasks

Search for 'Tasks by Planner & To Do' > Right Click > Pin



Pin 'Tasks' to the Navigation Bar

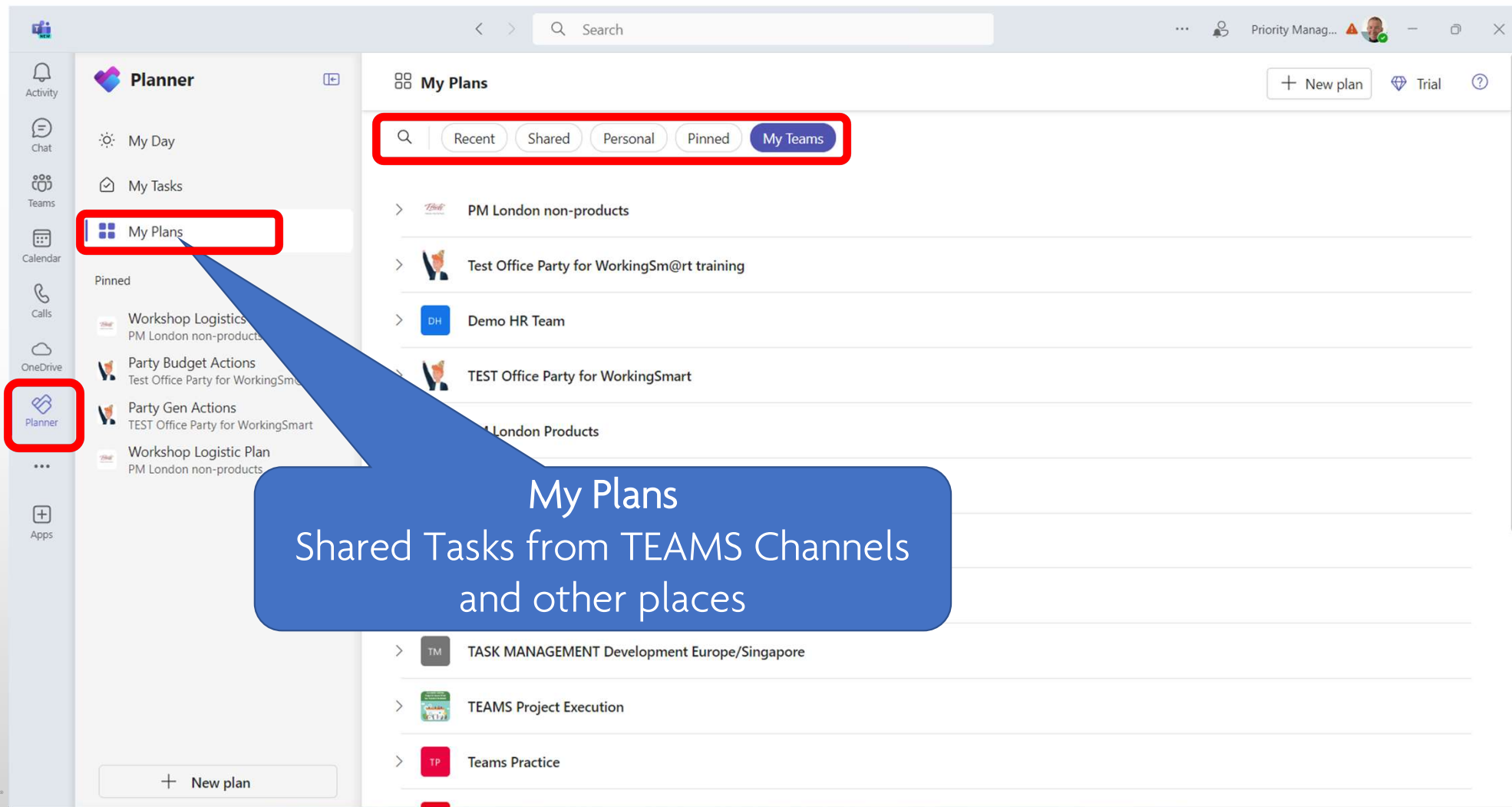
Ex3

Overviews ALL Tasks via Navigation Bar

The screenshot displays the Priority Management application interface. On the left, a navigation bar contains icons for Activity, Chat, Teams, Calendar, Calls, OneDrive, and Planner. The 'Planner' icon is highlighted with a red box. The main content area is titled 'My Tasks' and features a filter bar with 'All', 'Private Tasks', 'Assigned to me', and 'Flagged Emails' buttons. The 'All' button is highlighted with a red box. Below the filter bar is a table of tasks with columns for Task title, Source, Priority, and Due date. A blue callout box points to the 'My Tasks' filter with the text 'My tasks Own & Shared Tasks Assigned to you'.

Task title	Source	Priority	Due ↓
+ Add a task			
○ Add Legacy slides to WSMT	General / PM Products/Gen Acti...		4/22
○ Prepare for Workshop	10 Workshop Logistics / Works...		4/22
○ Update TEAMS slides	10 Workshop Logistics / Works...		4/22
	Private Tasks		4/29
	Flagged Emails		4/29
	Private Tasks		4/30
	Flagged Emails		5/7

Overviews ALL Tasks via Navigation Bar



The screenshot displays the Priority Planner application interface. On the left, a vertical navigation bar contains icons for Activity, Chat, Teams, My Plans, Calendar, Calls, OneDrive, Planner, and Apps. The 'Planner' icon is highlighted with a red box. The main content area is titled 'My Plans' and features a search bar with filters: Recent, Shared, Personal, Pinned, and My Teams. The 'My Teams' filter is also highlighted with a red box. Below the filters, a list of tasks is shown, including 'PM London non-products', 'Test Office Party for WorkingSm@rt training', 'Demo HR Team', and 'TEST Office Party for WorkingSmart'. A blue callout box with white text points to the 'My Plans' button in the navigation bar, stating: 'My Plans Shared Tasks from TEAMS Channels and other places'.

Ex3

Overview Own Tasks: 'Private Tasks'

The screenshot shows the Microsoft Planner interface. In the left-hand navigation pane, the 'Planner' icon is highlighted with a red box. The main view is titled 'My Tasks' and features a filter bar with 'Private Tasks' selected, also highlighted with a red box. Below the filter bar, a table lists tasks with columns for 'Task title', 'Priority', and 'Due'. A red arrow originates from the 'Private Tasks' filter and points to a table below the screenshot.

Task title	Priority	Due
+ Add a task		
Advanced Teams	📌	4/29
Watch Ignite presentations	🔍 1	4/30

Own Tasks from:	Own Tasks from:	Own Tasks from:
Posts/Chat	Outlook	To Do App

Important = Tasks marked Important in To Do app

Ex3

Overview Own Tasks: 'Assigned to me'

The screenshot displays the 'Planner' application interface. On the left sidebar, the 'Planner' icon is highlighted with a red box. The main content area shows the 'My Tasks' view with the 'Assigned to me' filter selected and highlighted with a red box. A red arrow points from this filter to a callout box in the bottom right corner that reads 'Shared Tasks from Channels: Assigned to me'.

Task title	Source	Priority	Due
+ Add a task			
<input type="radio"/> Update TEAMS slides	10 Workshop Logistics / Works...	High	4/22
<input type="radio"/> Prepare for Workshop	10 Workshop Logistics / Works...	High	4/22
<input type="radio"/> Add Legacy slides to WSMT	General / PM Products/Gen Acti...	High	4/22

Ex3



Overview of Own Tasks: 'Planned' – has ALL your Tasks!

The screenshot shows the Microsoft Planner interface. In the left-hand navigation pane, the 'Planner' icon is highlighted with a red box. In the main view, the 'My Tasks' section is active, and the 'All' filter button is also highlighted with a red box. A red arrow points from the 'All' filter to a table below.

Task title	Source	Priority	Due ↓
+ Add a task			
○ Add Legacy slides to WSMT	☀️ General / PM Products/Gen Acti...		4/22
○ Prepare for Workshop	☀️ 10 Workshop Logistics / Works...		4/22
○ Update TEAMS slides	☀️ 10 Workshop Logistics / Works...		4/22
○ Advanced Teams	🏠 Private Tasks		4/29
○ MB! / TG: BofA & WebEx functionality update	📧 1 Flagged Emails		4/29
○ Watch Ignite presentations	🏠 1 Private Tasks		4/30
○ Tim/Rich? Draft 21/3/24: AI: What do we say about AI, and what training do we a...	📧 1 Flagged Emails		5/7

Own Tasks from:	Own Tasks from:	Own Tasks from:	Shared Tasks from Channels:
Posts/Chat	Outlook	To Do App	Assigned to me

WorkingSm@rt

Overview 'Shared Tasks'

The screenshot displays the 'Planner' application interface. On the left sidebar, the 'Planner' icon is highlighted with a red box. The main area shows 'My Plans' with a filter bar containing 'Recent', 'Shared', 'Personal', 'Pinned', and 'My Teams'. A red box highlights the filter bar, with an arrow pointing to a blue callout box that reads 'Shared Tasks from Channels: Shared Tasks - All with'. Below the filter bar, a list of plans is shown. The first plan, 'Meeting actions', has a red box around its menu icon (three dots). A red arrow points from this menu icon to a context menu that is open, showing options: 'Open', 'Rename', 'Pin plan', and 'Hide'. The 'Pin plan' option is highlighted with a red box. The list of plans includes items like 'Party Budget Actions', 'Workshop Logistic Plan', 'Party Gen Actions', 'Rich Tim Mike Shared', 'Tim's Plan April 24', 'Execution Plan', 'Resize', and 'Party Gen/Actions'.

Ex4



Overviews ALL Tasks via Navigation Bar

A Better Way To Work

The screenshot shows the software interface with a navigation bar on the left and a main task list area. The navigation bar includes icons for Activity, Chat, Teams, Calendar, Calls, and a 'Tasks by Planner and To Do' icon. The 'Tasks by Planner and To Do' icon is highlighted with a red box. Below it, the 'My tasks' text is also highlighted with a red box. At the bottom of the navigation bar, the 'Tasks by Pl...' icon is highlighted with a red box. Below the navigation bar, the 'Shared plans' text is highlighted with a red box. The main task list area shows a table of tasks with columns for Task title, Assigned to, Priority, Due, and Bucket. A blue callout box points to the 'My tasks' text, and another blue callout box points to the 'Shared plans' text.

My tasks
Own & Shared Tasks Assigned to you

Shared plans
Shared Tasks from Channels (Own + Others)

Ex4

Overview Own Tasks: 'Tasks'

Tasks by Planner and To Do

My tasks

Tasks

Different Selections of 'My Tasks'

Important

Planned

Assigned to me

Priority Due ↓

Task Created from a Post	1/10	...
Task Created in Outlook	1/10	...
Task Created in To Do	1/10	...

Important = Tasks marked Important in To Do app

Own Tasks from:	Own Tasks from:	Own Tasks from:
Posts/Chat	Outlook	To Do App

Ex4



Overview Own Tasks: 'Assigned to me'

The screenshot shows the 'Tasks by Planner and To Do' interface. The left sidebar contains navigation options: Activity, Chat, Teams, Calendar, Calls, Files, and 'Tasks by PL...'. The main area is titled 'Assigned to me' and contains a table with the following columns: Task title ↓, Source, Priority, and Due. A task is listed: 'Send presentation to John' with source 'Learning Materials / Party Trans...'. A red box highlights the 'Source' column header, and another red box highlights the 'Assigned to me' filter in the sidebar. A red arrow points from the sidebar box to a callout box on the right.

Task title ↓	Source	Priority	Due
+ Add a task			
○ Send presentation to John	Learning Materials / Party Trans...		

Shared Tasks from Channels:
Assigned to me

Ex4



Overview of Own Tasks: 'Planned' – has ALL your Tasks!

Planned

Task title	Source	Priority	Due ↓
+ Add a task			
○ a task	25 PM WSM Teams Actions	High	11/2021
○ look at task map	25 PM WSM Teams Actions	High	11/2021
○ Overload Tim	90 Practice Channel / TPE Practi...	High	11/2021
○ Project update	90 Practice Channel / TPE Practi...	High	11/2021
○ Review script 247	25 PM WSM Teams Actions	High	11/2021
○ Task for Tim			
○ Work on slides Planner task			
○ test			
○ Task 2			
○ Create new TEAMS timing sheet			

Own Tasks from:	Own Tasks from:	Own Tasks from:	Shared Tasks from Channels:
Only Tasks that have a due date			
Posts/Chat	Outlook	To Do App	Assigned to me

Ex4

Overview 'Shared Tasks'

The screenshot shows the 'Tasks by Planner and To Do' interface. The left sidebar contains navigation options: Activity, Chat, Teams, Calendar, Calls, Files, and 'Tasks by Planner and To Do' (highlighted with a red box). Below this, there are sections for 'My tasks' (Tasks, Important, Planned, Assigned to me) and 'Shared plans' (highlighted with a red box). The 'Shared plans' section lists: Office Party for WorkingSmart MASTER, Budget/Party Actions (30 Budget), Learning Tasks (Learning Materials), and Learning Channel Actions (Learning Materials, highlighted with a red box). The main task list (highlighted with a red box) has the following data:

Task title	Assigned to	Priority	Due	Bucket ↓
+ Add a task				
Review Presentation	CP PO		1/28	To do
Send presentation to PMO	CP Clare Peck		1/21	Clare Peck
Review Q1 Presentation	CP Clare Peck		11/2021	Clare Peck
review presentation	PO Priority Management ...			PMO
Add dates to report	PO Priority Management ...			PMO

At the bottom right, a legend box (highlighted with a red box) contains two items: 'Shared Tasks from Channels:' and 'Shared Tasks – All'.

Ex4



Microsoft To Do App: ALL Tasks on multiple devices

A Better Way To Work



Microsoft To Do

The screenshot shows the Microsoft To Do application window. On the left is a navigation pane with a search bar and several list categories: 'My Day', 'Important', 'Planned' (78 items), 'Assigned to me', 'Flagged email' (1 item, highlighted with a red box), 'Tasks' (110 items), 'KL/TG ToDo Shared List T...' (1 item), 'Project Tasks Archive' (11 items), and 'New list'. The main area displays the 'Flagged email' list, which contains one task: 'CID 420616' with a 'Today' due date and an email icon. A blue callout box with an arrow pointing to the 'Flagged email' list item contains the text 'Includes Flagged Emails'.

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