Priority Management International | 55 Offices | HQ Vancouver | Founded 1980

Priority®
A Better Way To Work

Tasks Explanation Handout

WorkingSm@rt with Microsoft TEAMS Training

WorkingSm@rt®
MICROSOFT
+Teams

A Better Way To Work

Tasks in TEAMS – 3 Sources

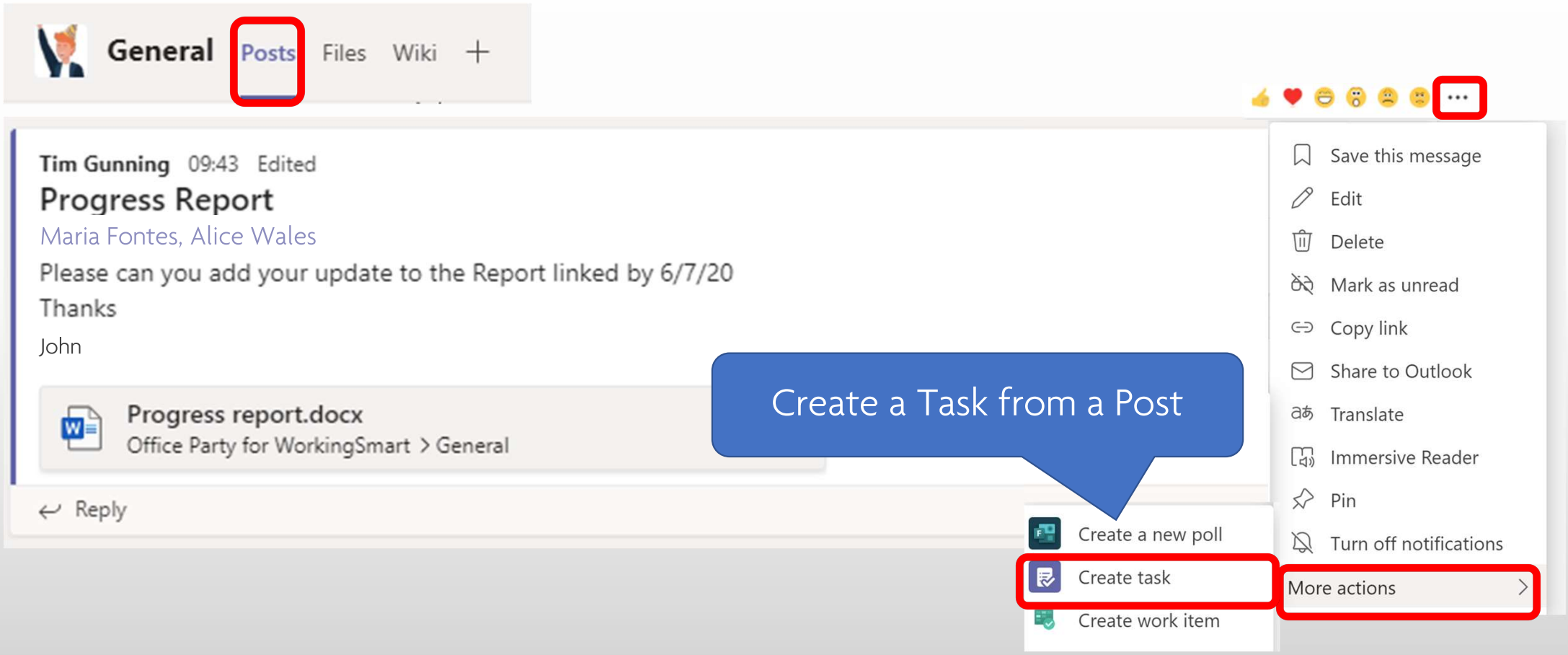
1. **Own** Tasks from Posts/Chats
2. **Own** Tasks from Outlook
3. **Shared** Tasks in Channels e.g. Projects + Meetings

Using 'Planner' App

© 2022 Priority Management International Inc

A Better Way To Work
Slide

1. Own Tasks from Posts/Chats



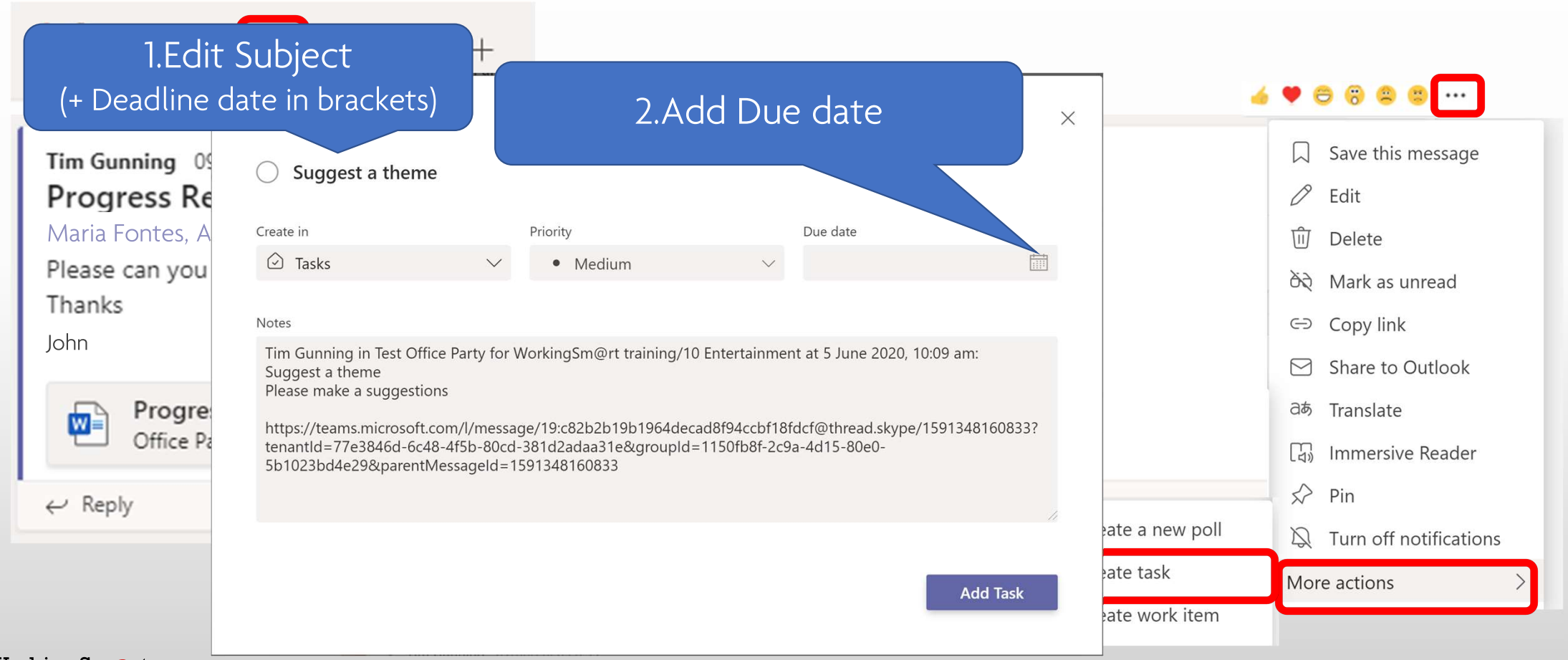
WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

A Better Way To Work
Slide

1. Own Tasks from Posts/Chats



WorkingSm@rt

© 2022 Priority Management International Inc

1. Own Tasks from Posts/Chats

1. Edit Subject
(+ Deadline date in brackets)

2. Add Due date = Action Date

Tim Gunning 09:4
Progress Rep
Maria Fontes, Alic
Please can you a
Thanks
John
Progress
Office Part
Reply

Suggest a theme

Create in
Tasks

Priority
Medium

Due date

Notes

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

Copy link
Delete
Pin
Open conversation in new window
Create task
S re to Outlook
M unread

Create a Task from a Post

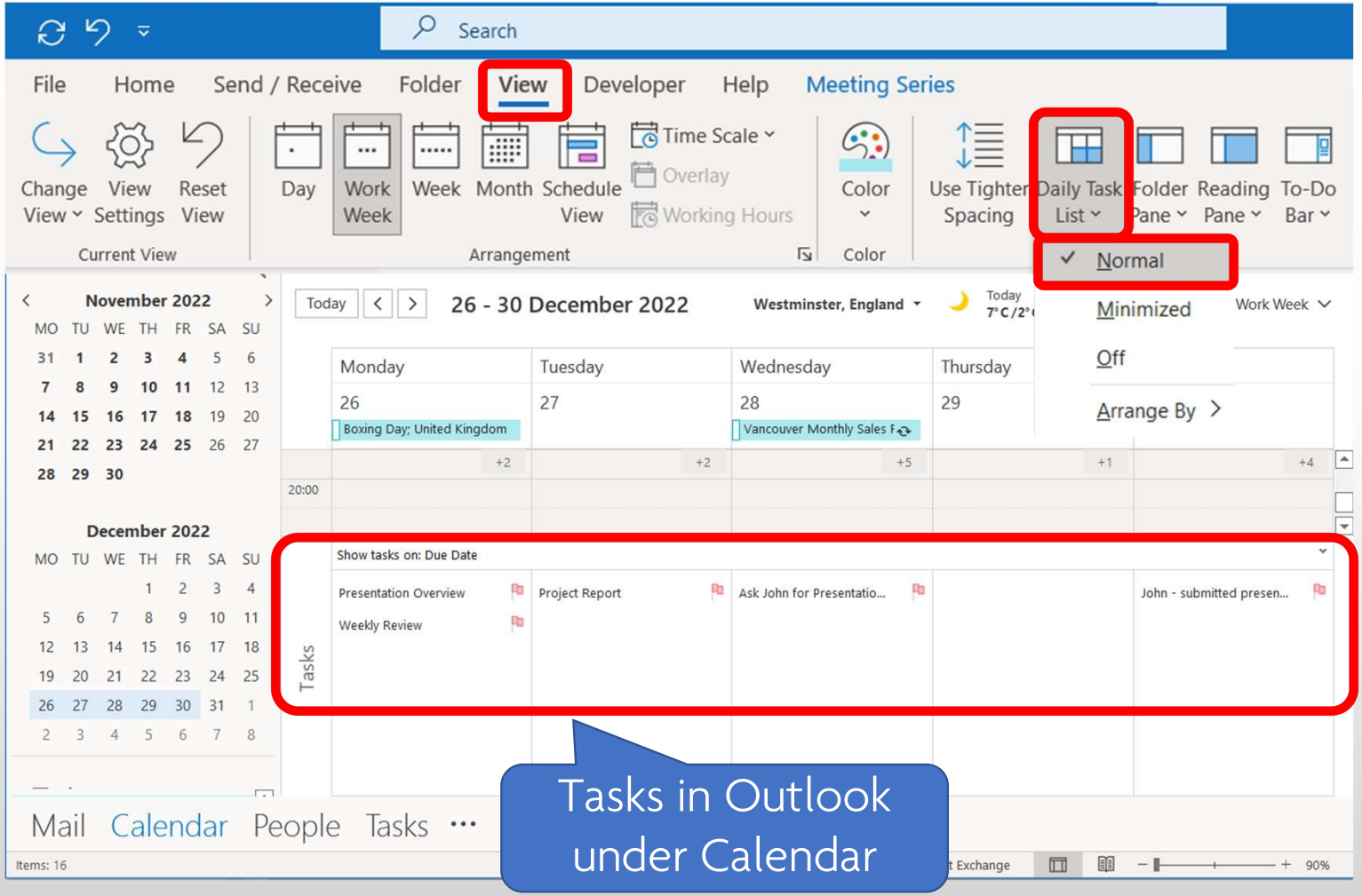
WorkingSm@rt

© 2024 Priority Management International Inc

Ex4

A Better Way To Work

2. Own Tasks from Outlook



WorkingSm@rt

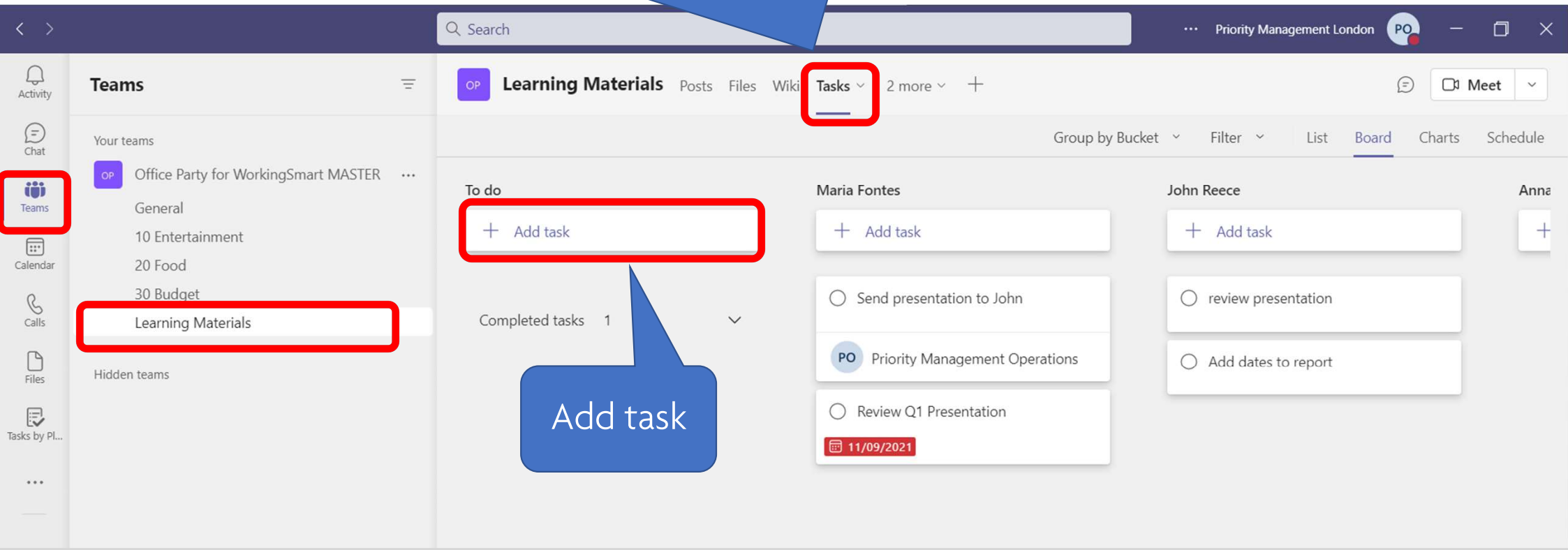
© 2022 Priority Management International Inc

Ex4

A Better Way To Work

3. Shared Tasks in Channels

Add *'Planner'* Tab in Channels

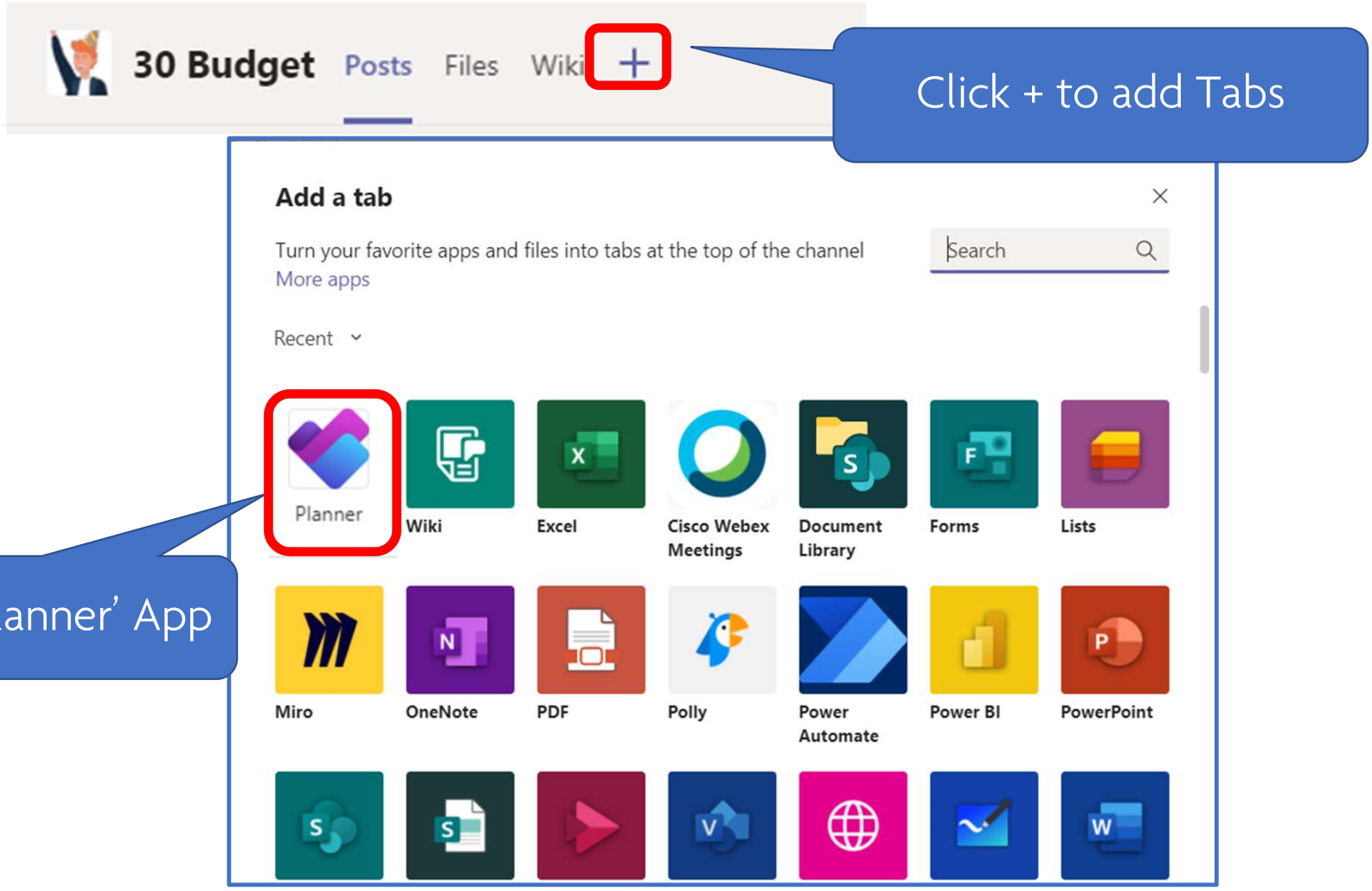


WorkingSm@rt

© 2022 Priority Management International Inc

Ex3 Priority®
A Better Way To Work

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



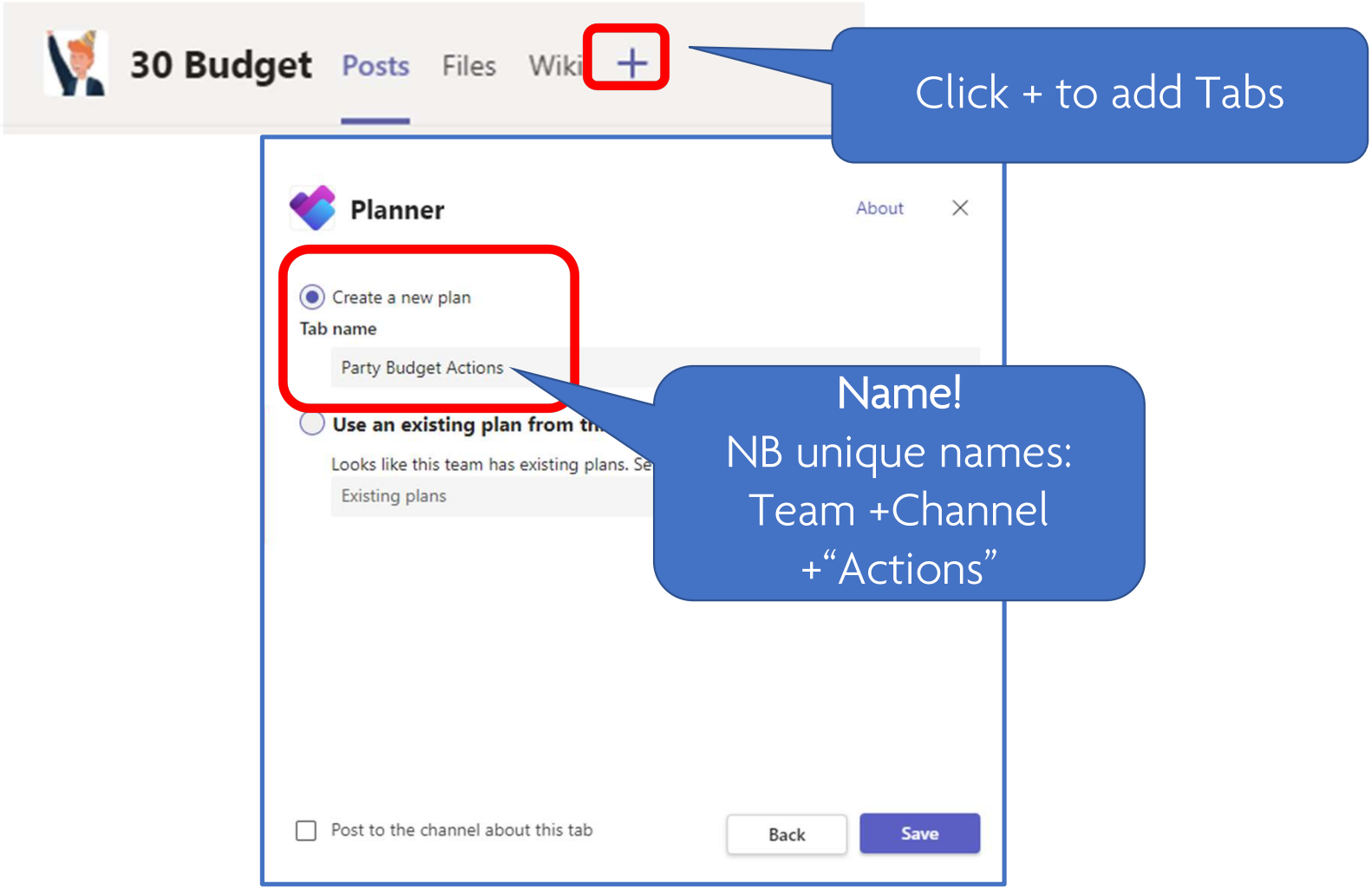
WorkingSm@rt

© 2024 Priority Management International Inc

Ex3 Priority®
A Better Way To Work

Add 'Planner' as Tab
(in any Channel)

Demo

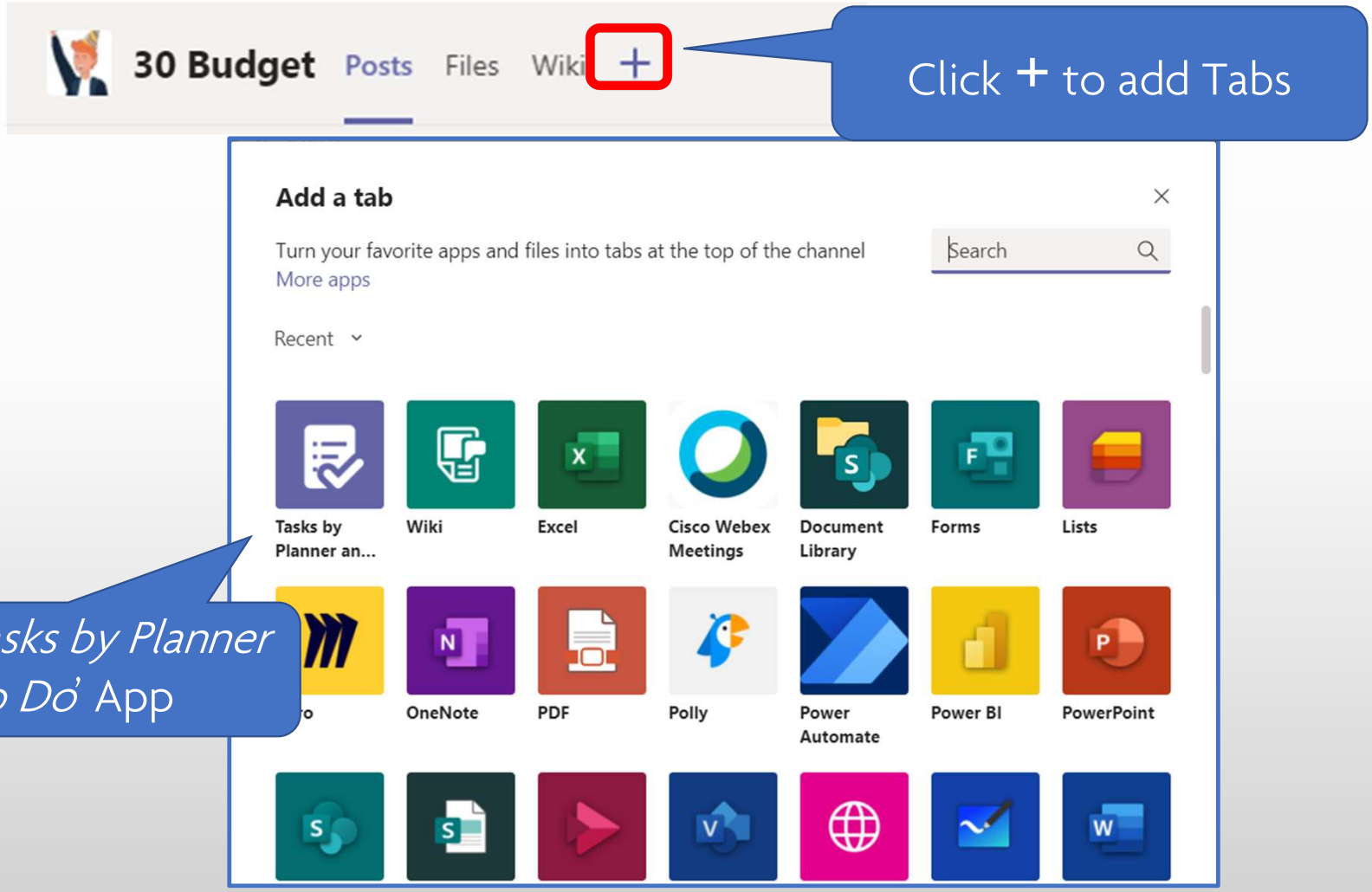


WorkingSm@rt

© 2024 Priority Management International Inc

Ex4 Priority®
A Better Way To Work

Shared Tasks: Add Tab in each Channel



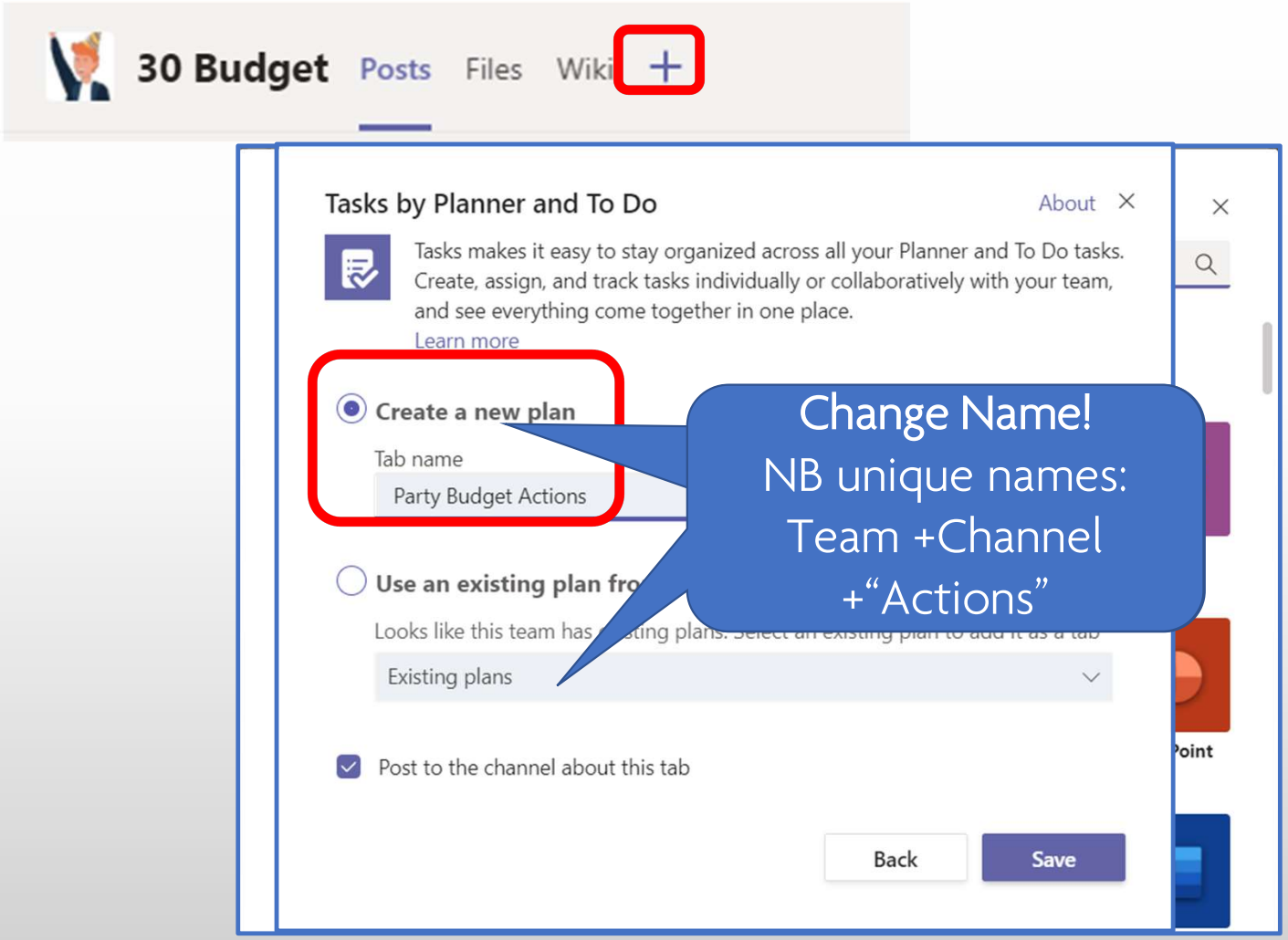
WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

A Better Way To Work

Shared Tasks: Add Tab in each Channel



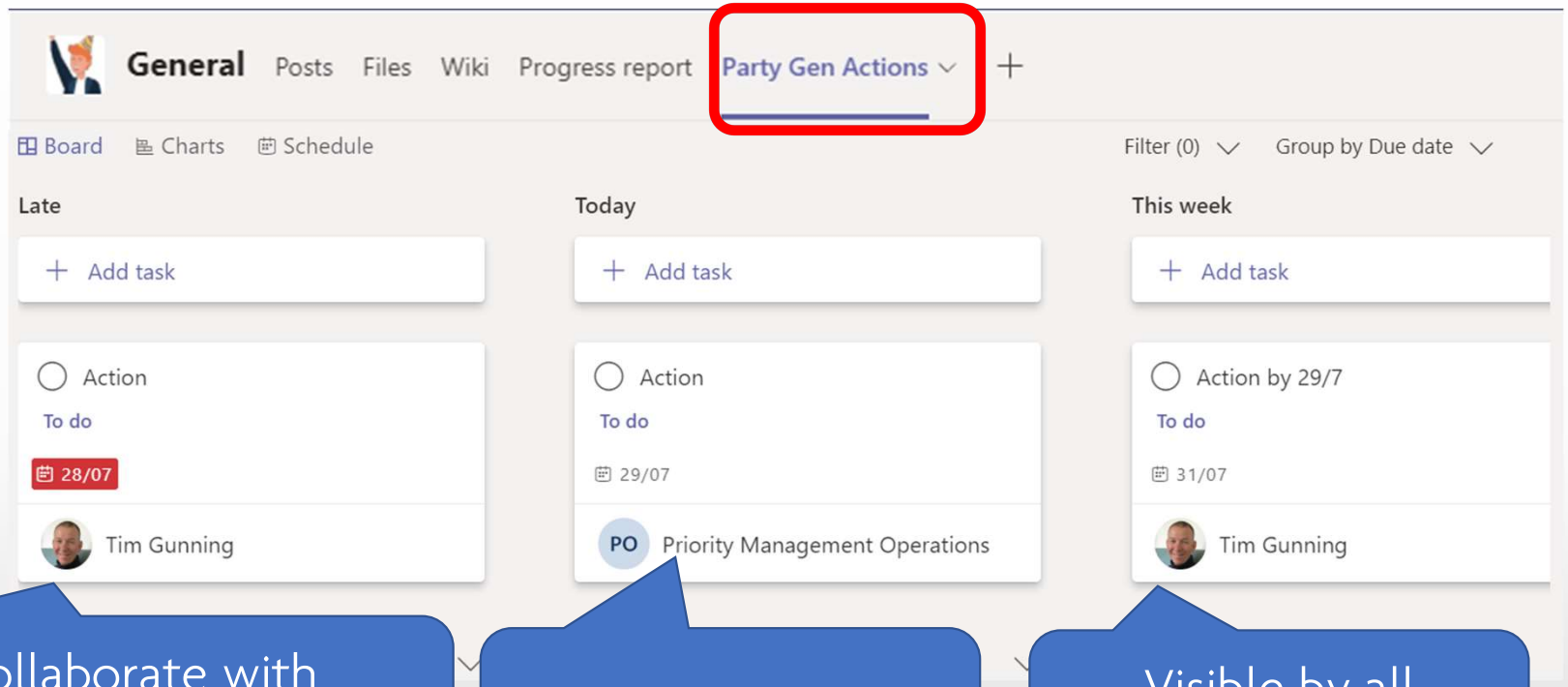
WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

A Better Way To Work

Shared Tasks: Group in 'Buckets'



Collaborate with Shared Tasks

Assign and Date

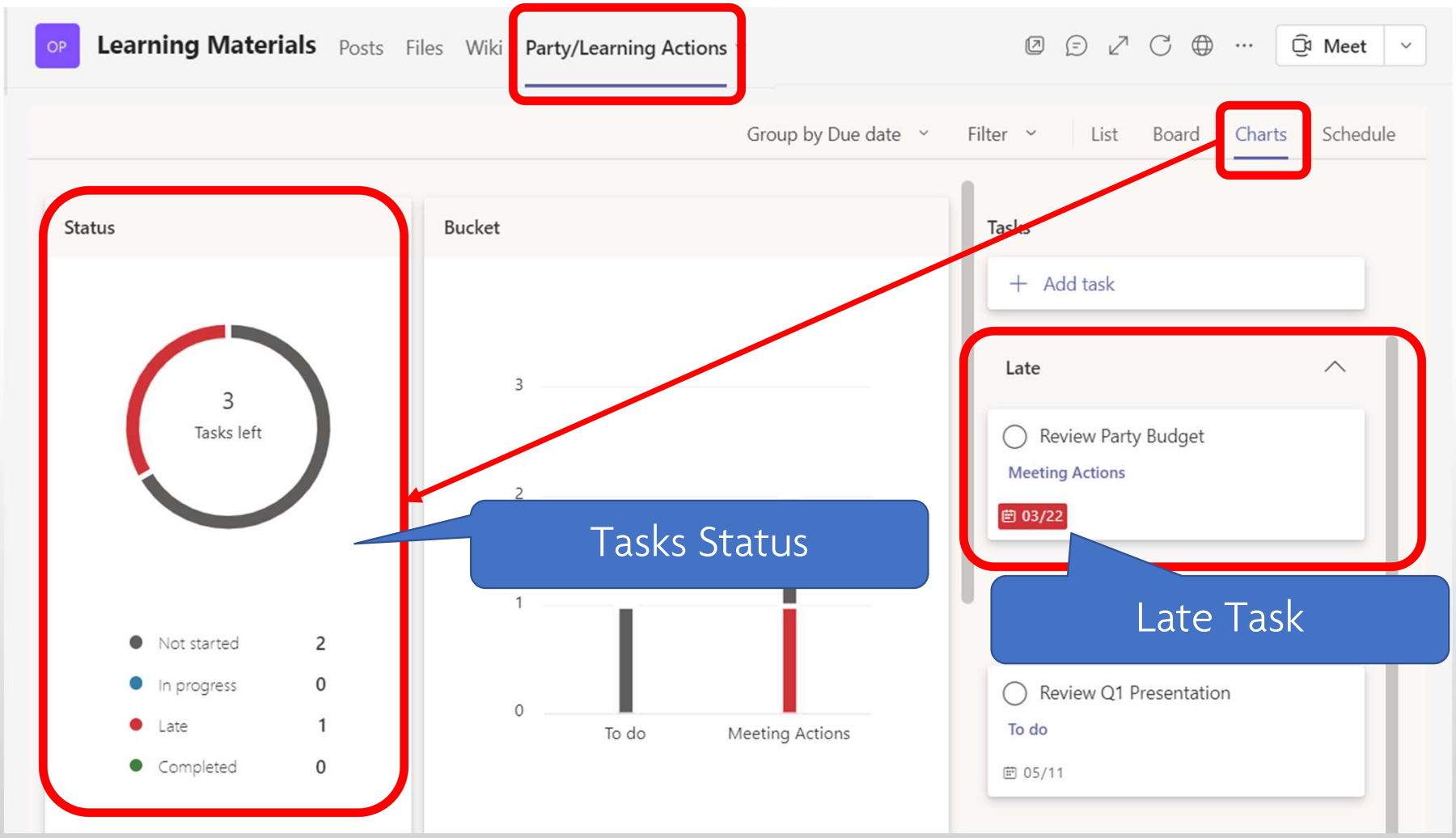
Visible by all in the TEAM

WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

Planner Tab - Monitor progress



WorkingSm@rt

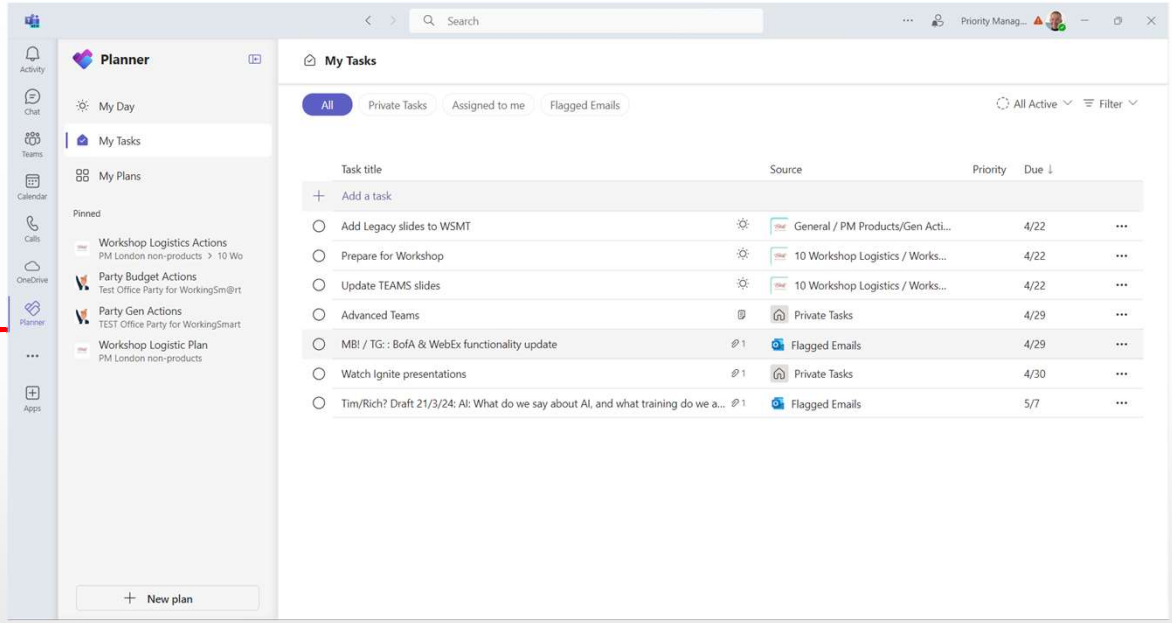
© 2022 Priority Management International Inc

Ex4

A Better Way To Work

‘Planner’ Overview ALL Tasks in one place

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



© 2022 Priority Management International Inc

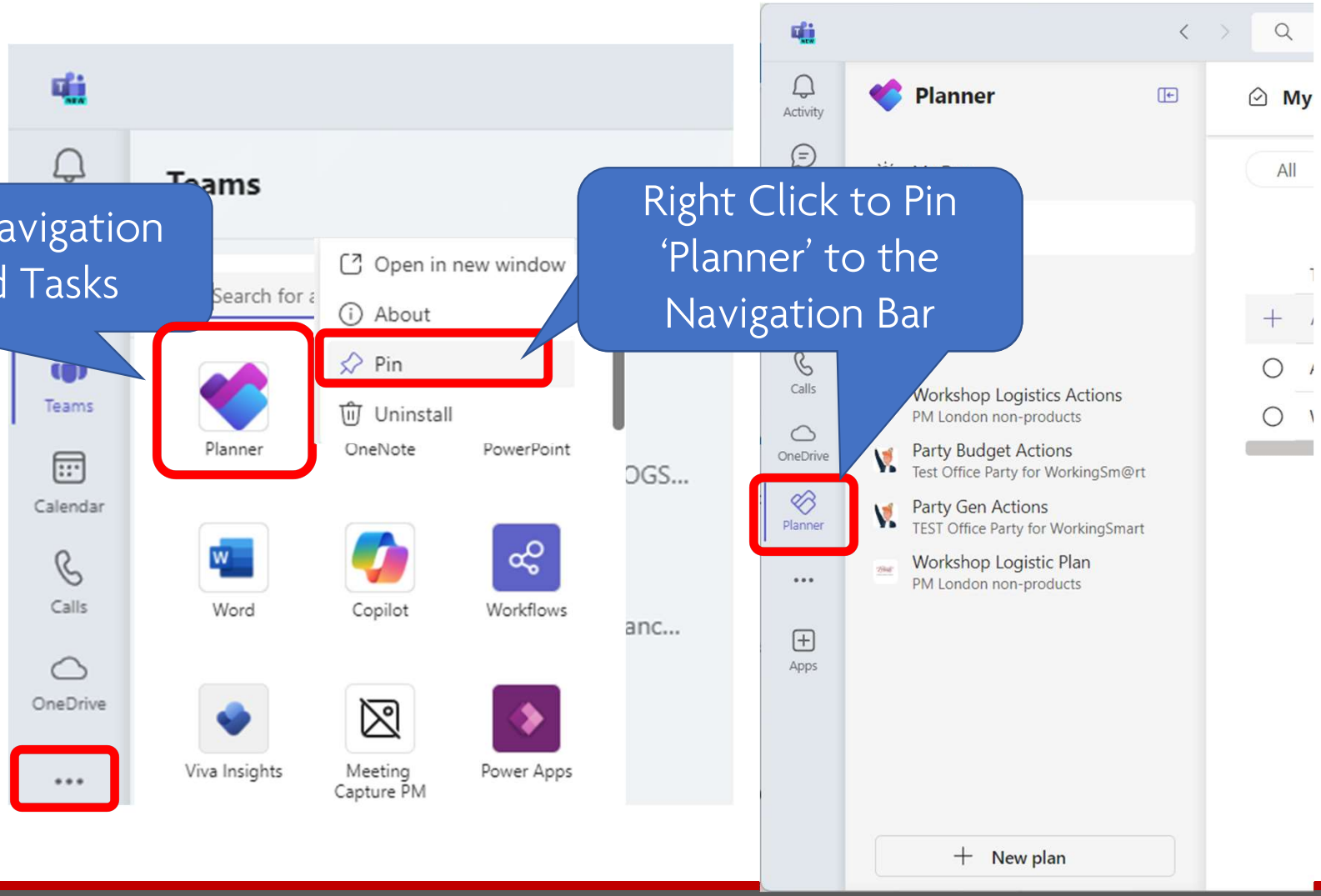
A Better Way To Work

Tasks on Navigation Bar – Using Desktop App Version

Try It

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

Right Click to Pin 'Planner' to the Navigation Bar



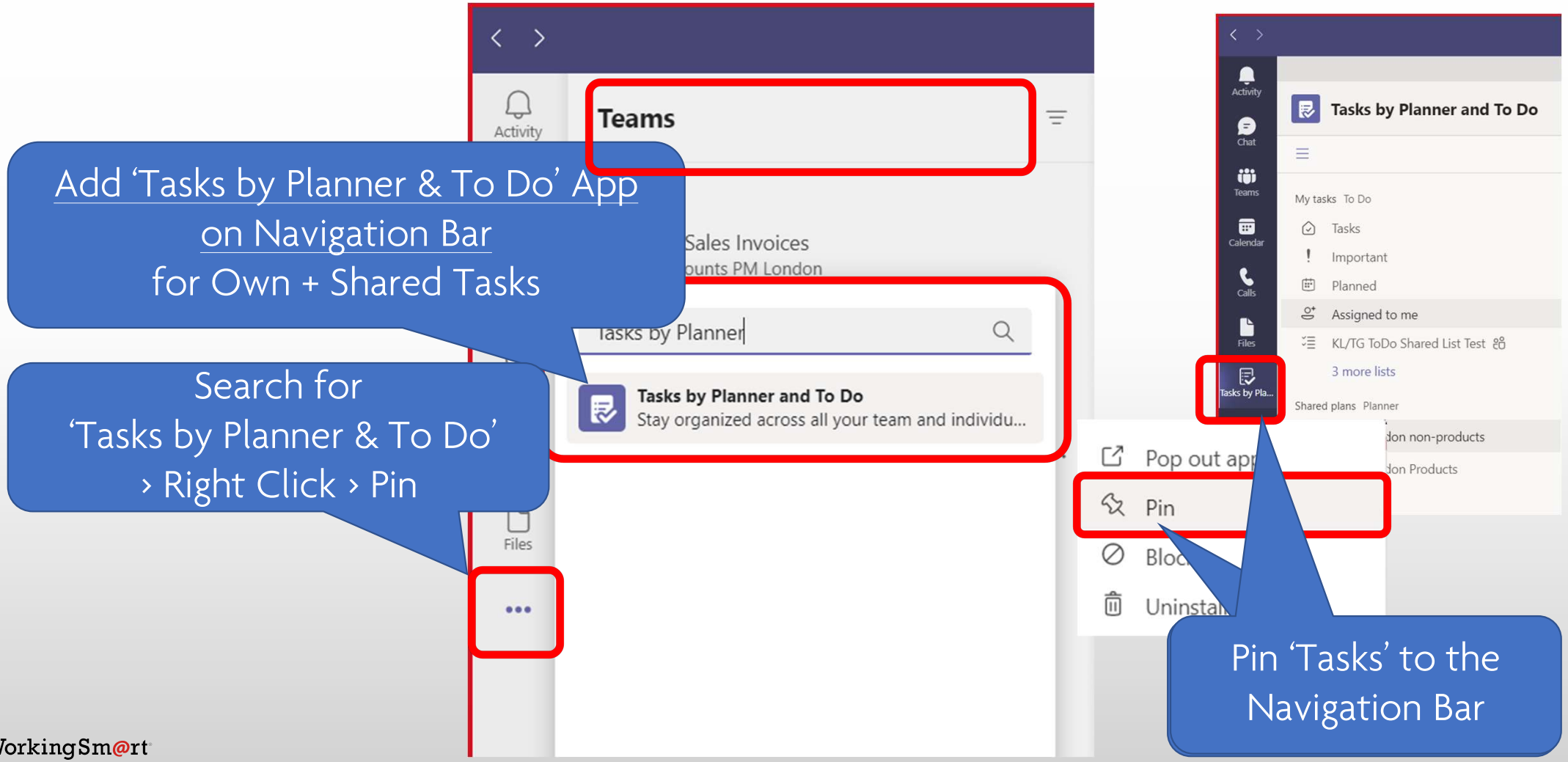
WorkingSm@rt

© 2024 Priority Management International Inc

Ex4

A Better Way To Work

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



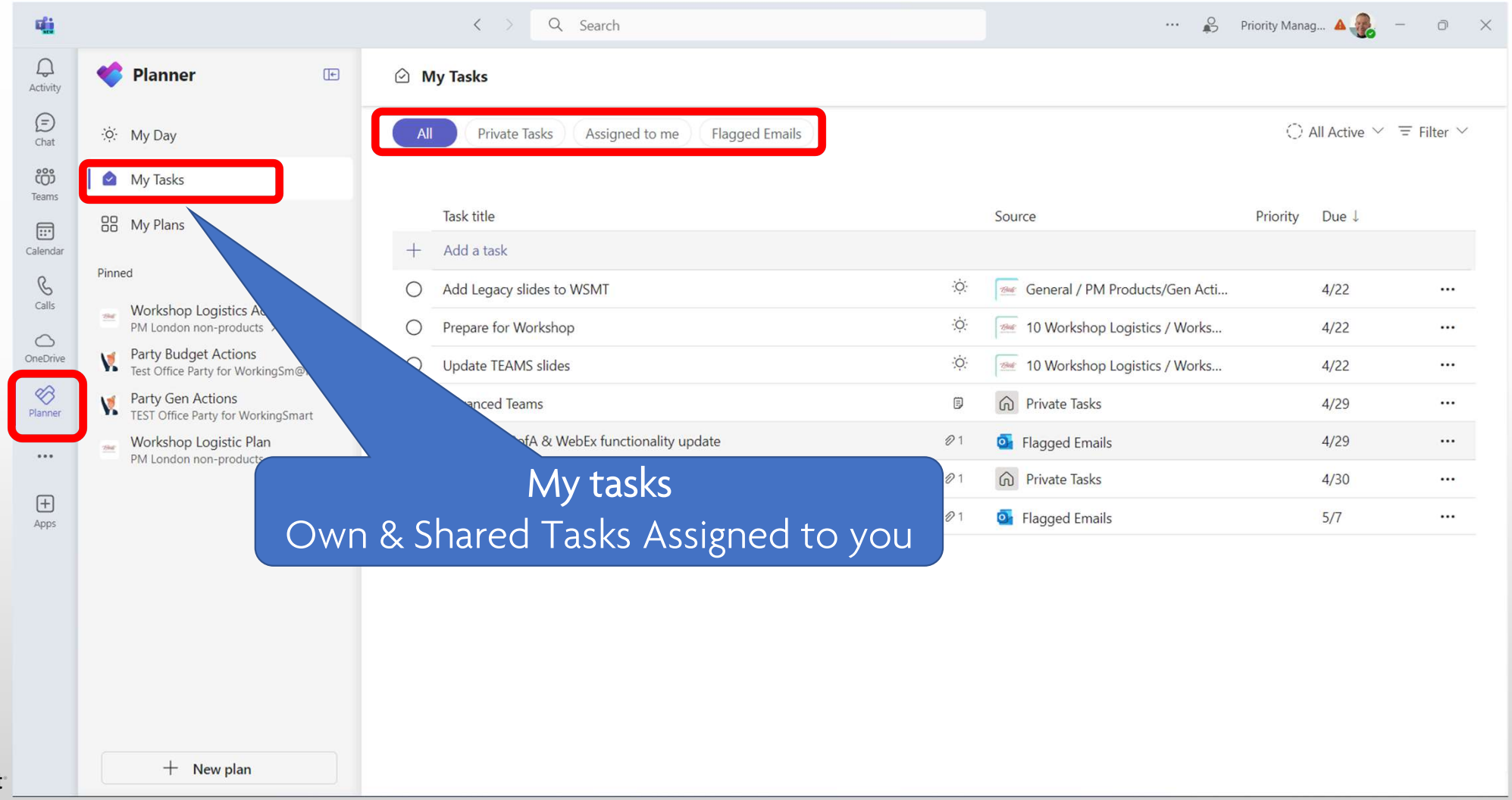
WorkingSm@rt

© 2022 Priority Management International Inc

Ex3

A Better Way To Work

Overviews ALL Tasks via Navigation Bar



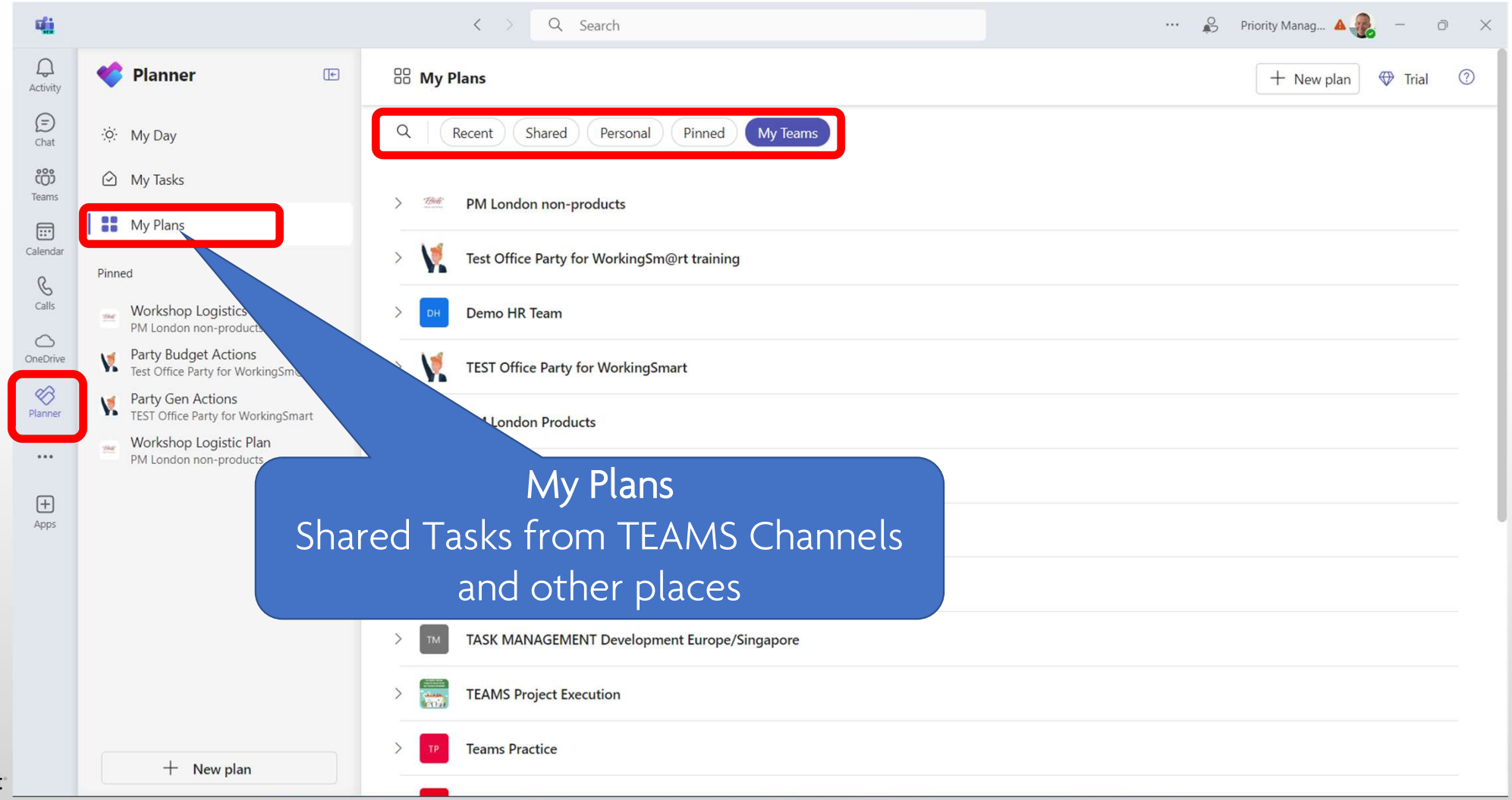
WorkingSm@rt

© 2024 Priority Management International Inc

Ex3

A Better Way To Work

Overviews ALL Tasks via Navigation Bar



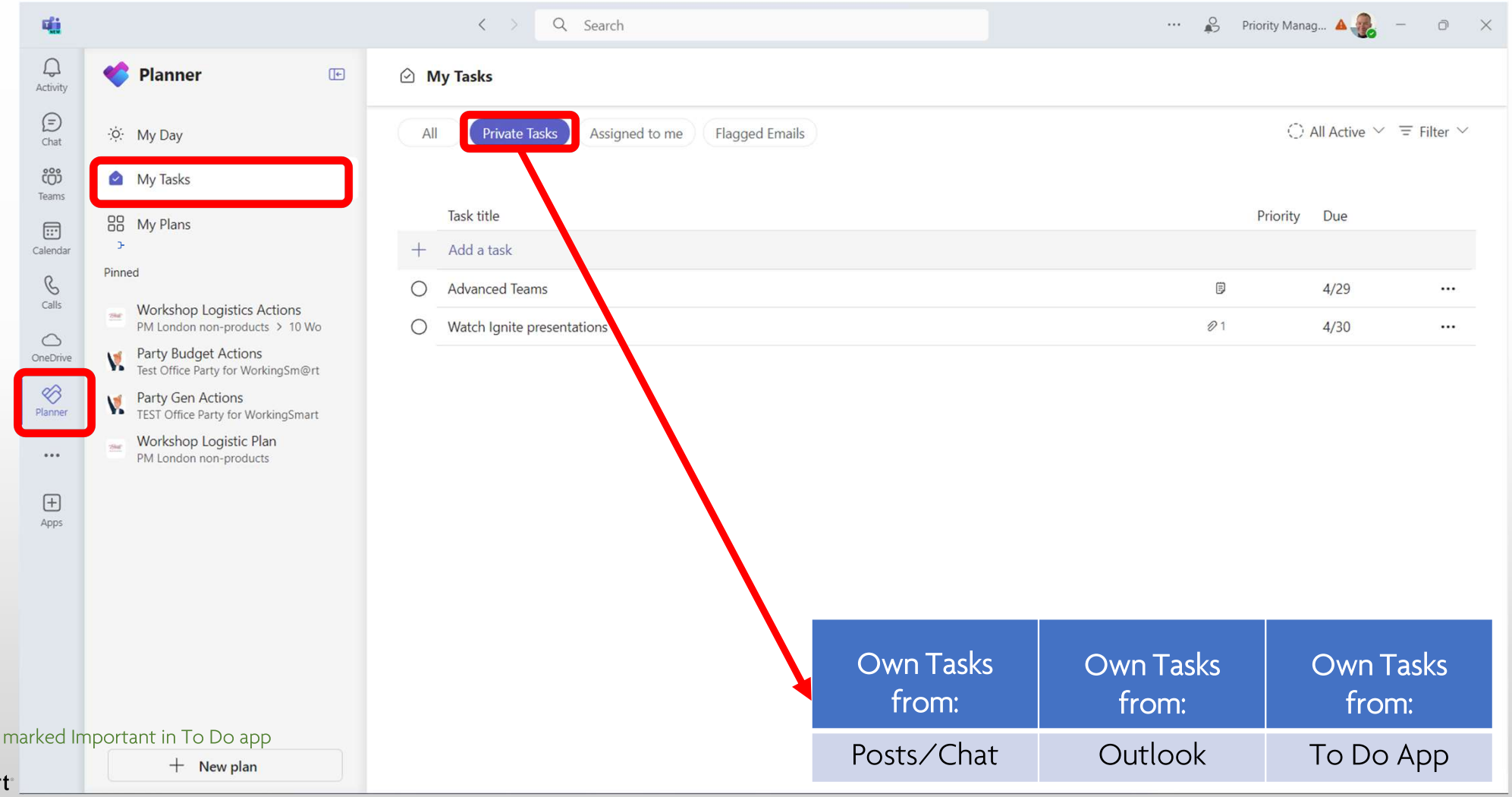
WorkingSm@rt

© 2024 Priority Management International Inc

Ex3

A Better Way To Work

Overview Own Tasks: 'Private Tasks'



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

Important = Tasks marked Important in To Do app

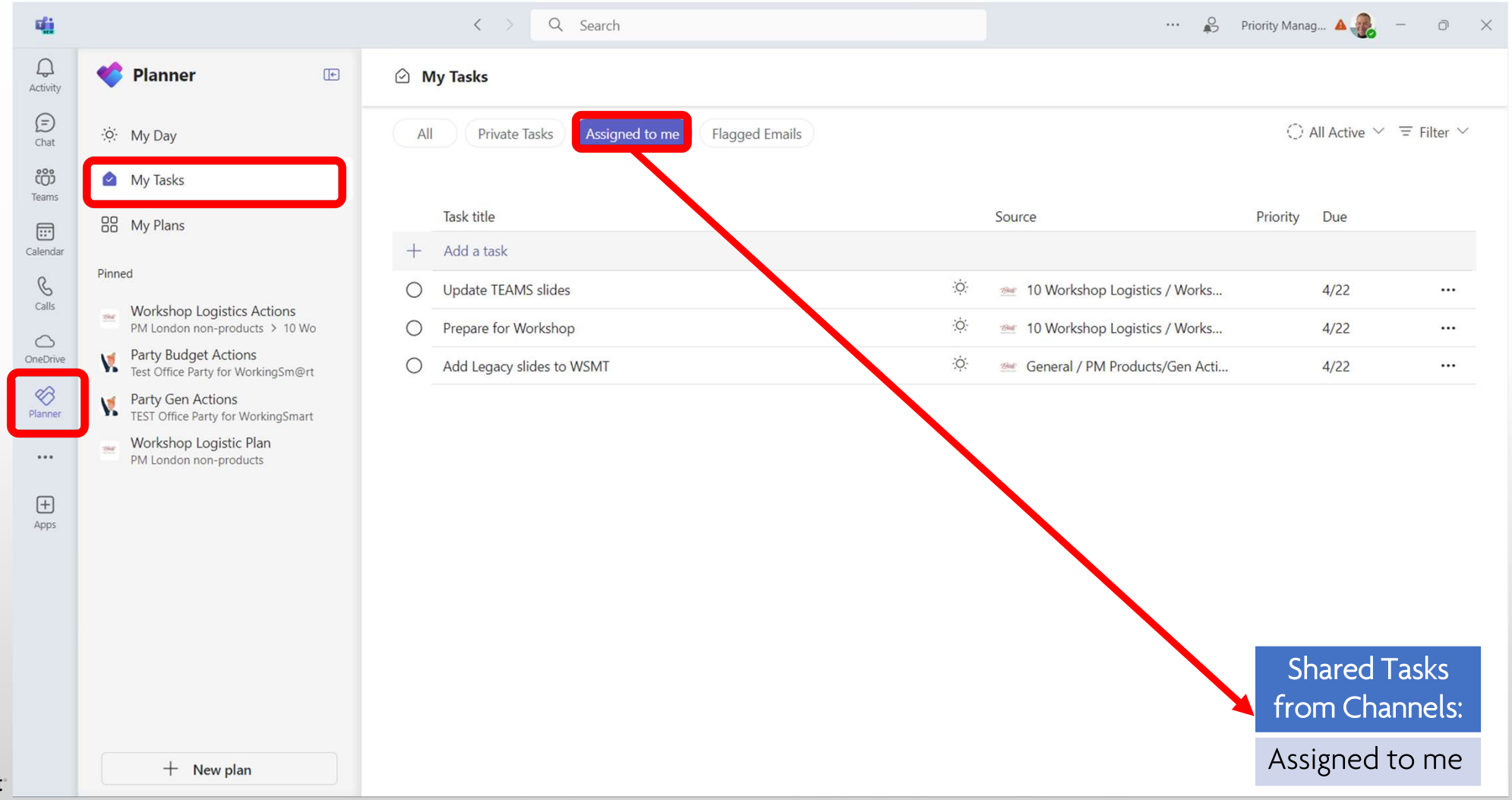
WorkingSm@rt

© 2024 Priority Management International Inc

Ex3

A Better Way To Work

Overview Own Tasks: 'Assigned to me'



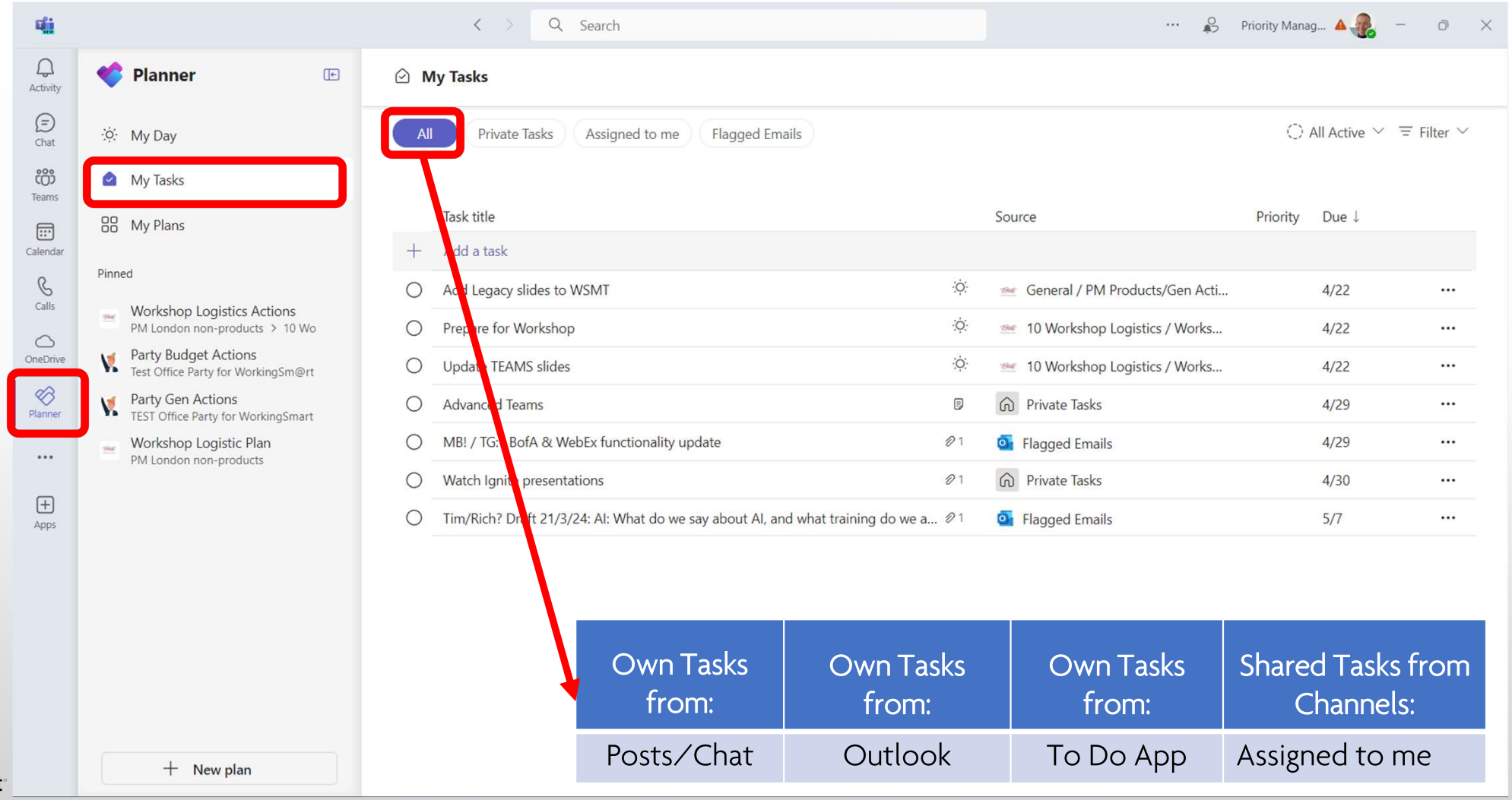
WorkingSm@rt

© 2024 Priority Management International Inc

Ex3

A Better Way To Work

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



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

WorkingSm@rt

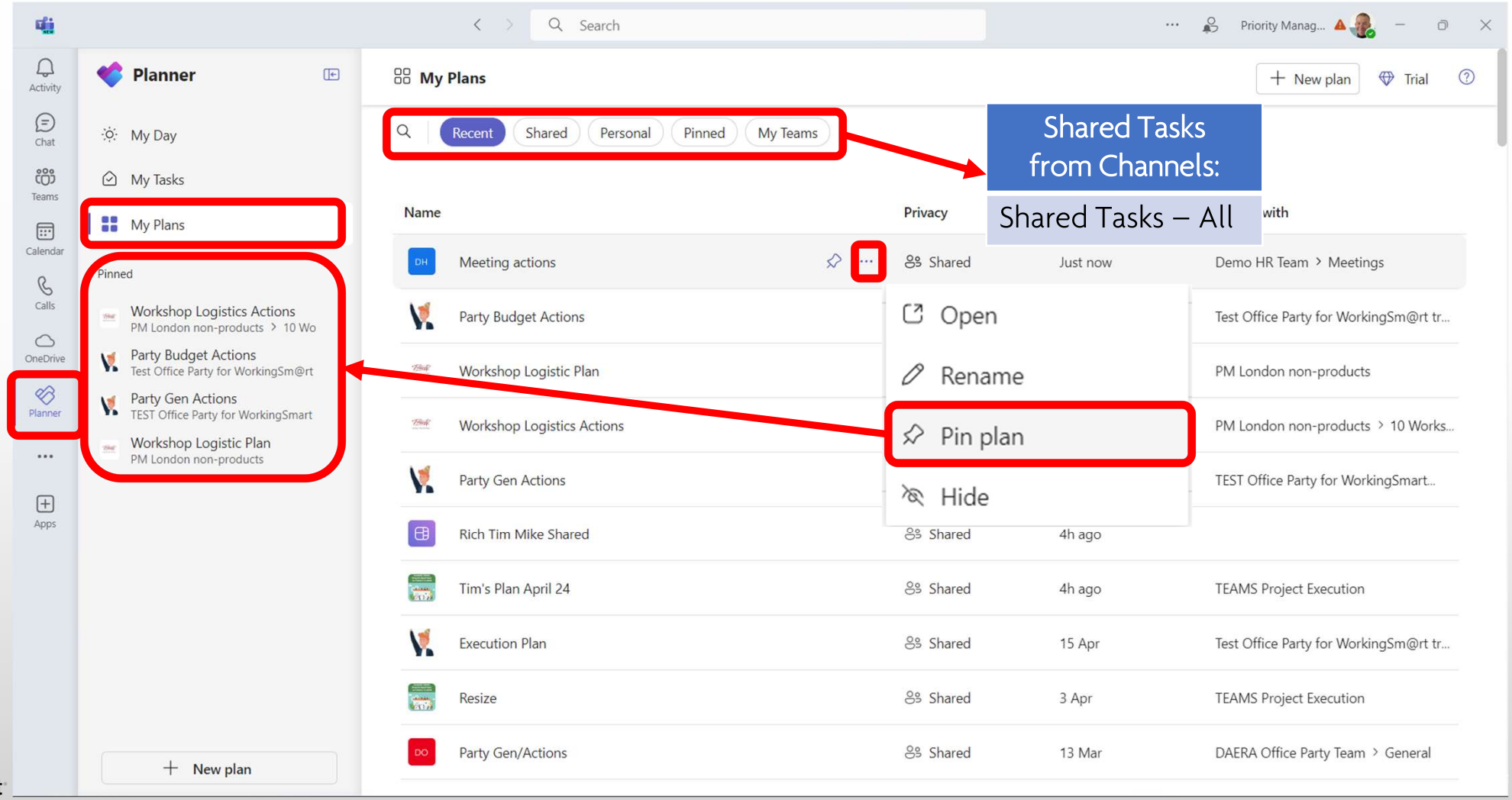
© 2024 Priority Management International Inc

Ex3

Priority®

A Better Way To Work

Overview ‘Shared Tasks’



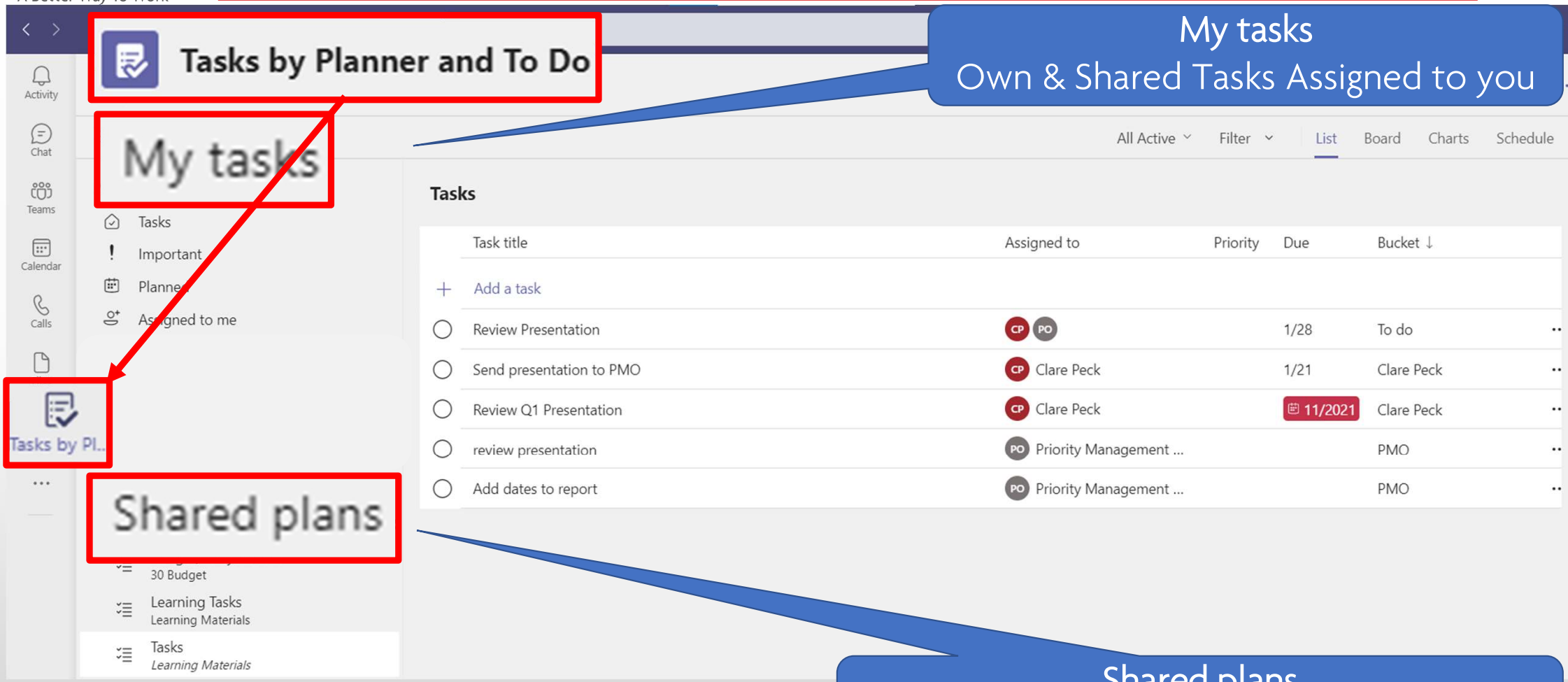
WorkingSm@rt

© 2024 Priority Management International Inc

Ex4

A Better Way To Work

Overviews ALL Tasks via Navigation Bar



My tasks
Own & Shared Tasks Assigned to you

Shared plans
Shared Tasks from Channels (Own + Others)

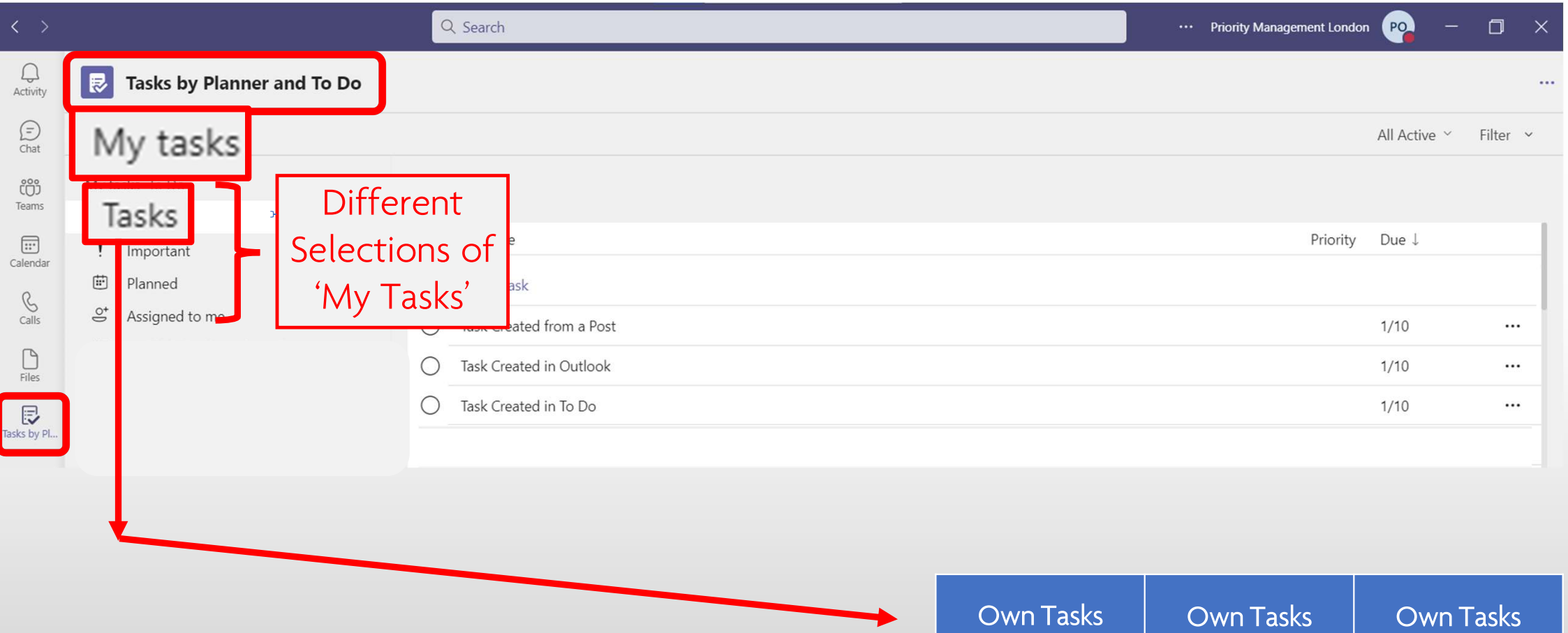
WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

A Better Way To Work

Overview Own Tasks: 'Tasks'



Important = Tasks marked Important in To Do app

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

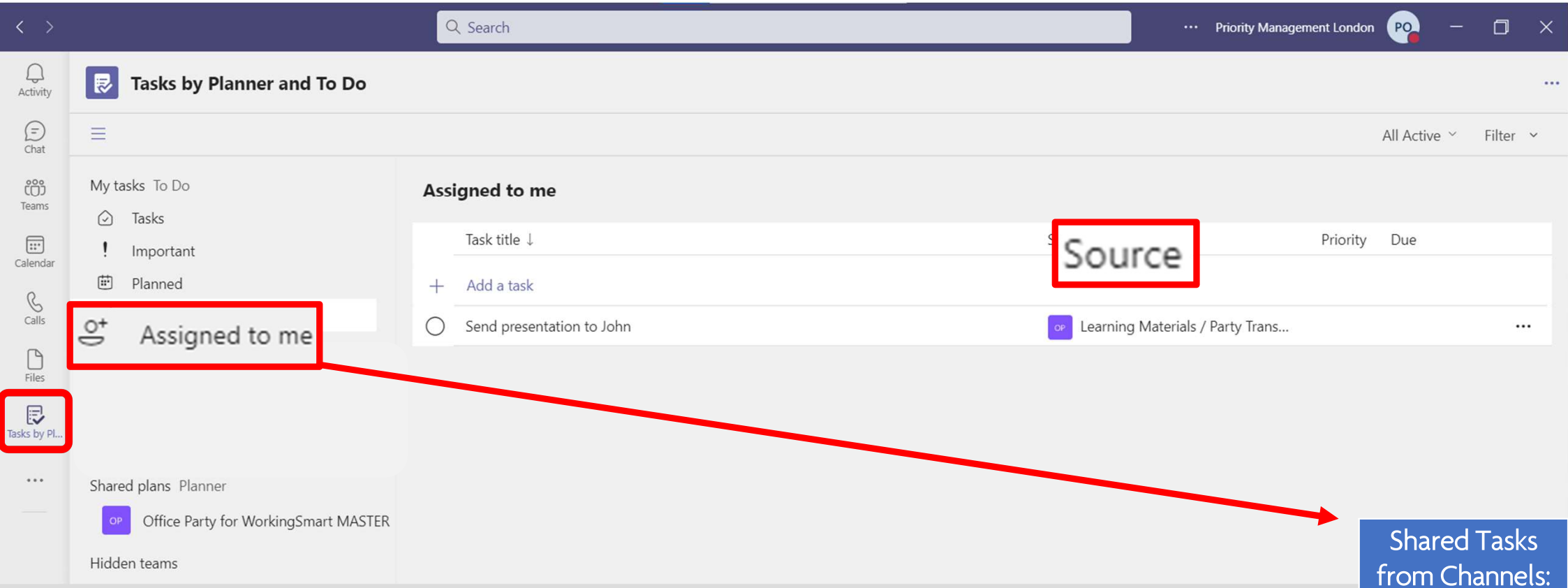
WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

A Better Way To Work

Overview Own Tasks: 'Assigned to me'



Shared Tasks from Channels:

Assigned to me

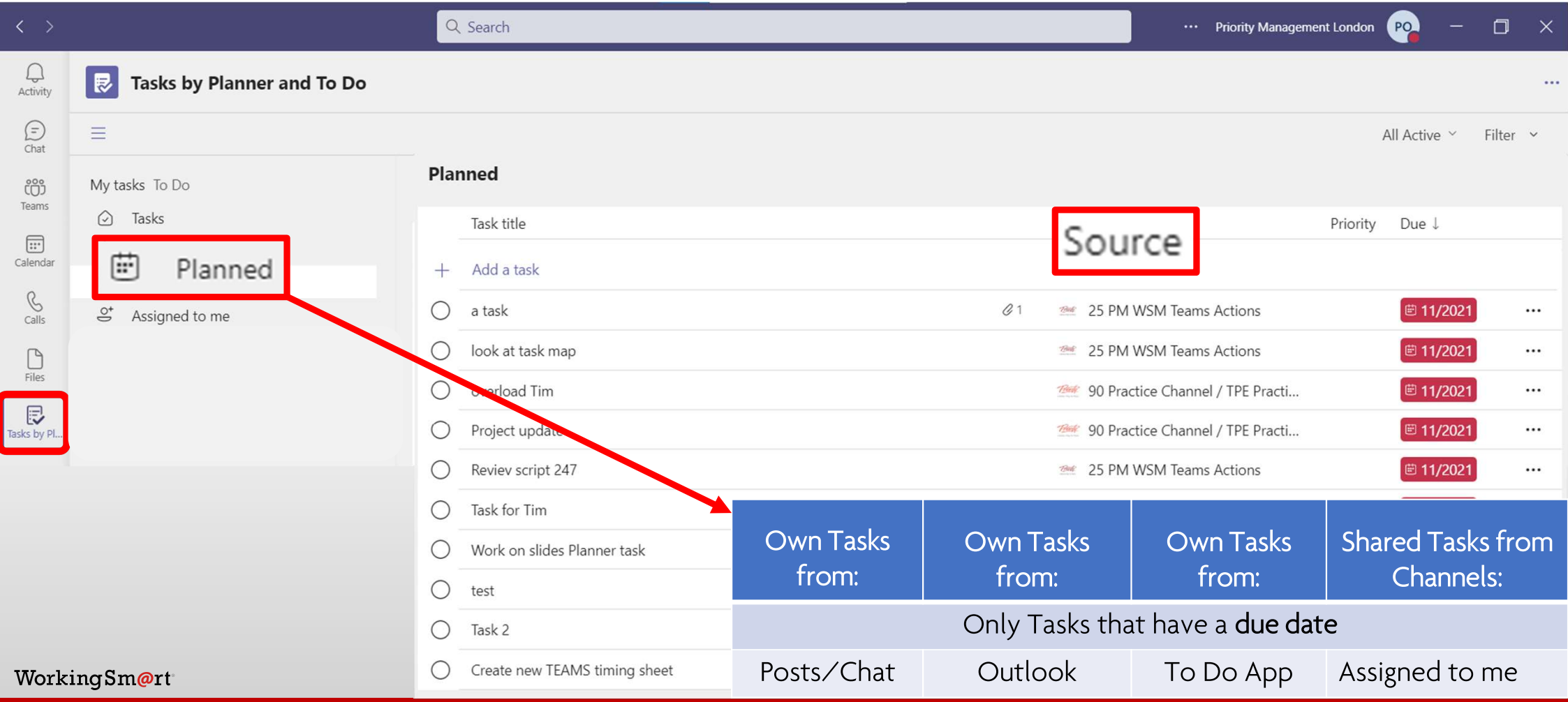
WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

A Better Way To Work

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



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

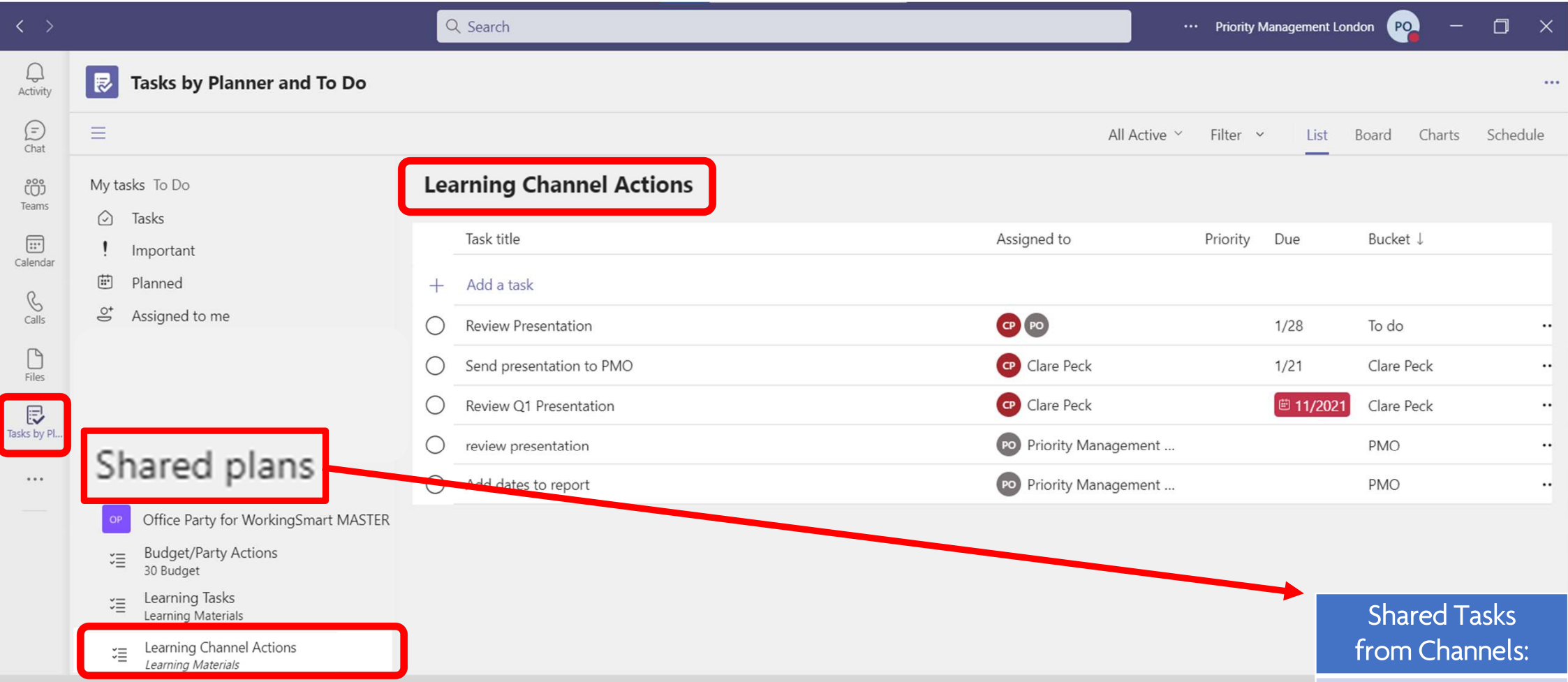
WorkingSm@rt

© 2022 Priority Management International Inc

Ex4

A Better Way To Work

Overview ‘Shared Tasks’



Shared Tasks from Channels:

Shared Tasks – All

WorkingSm@rt

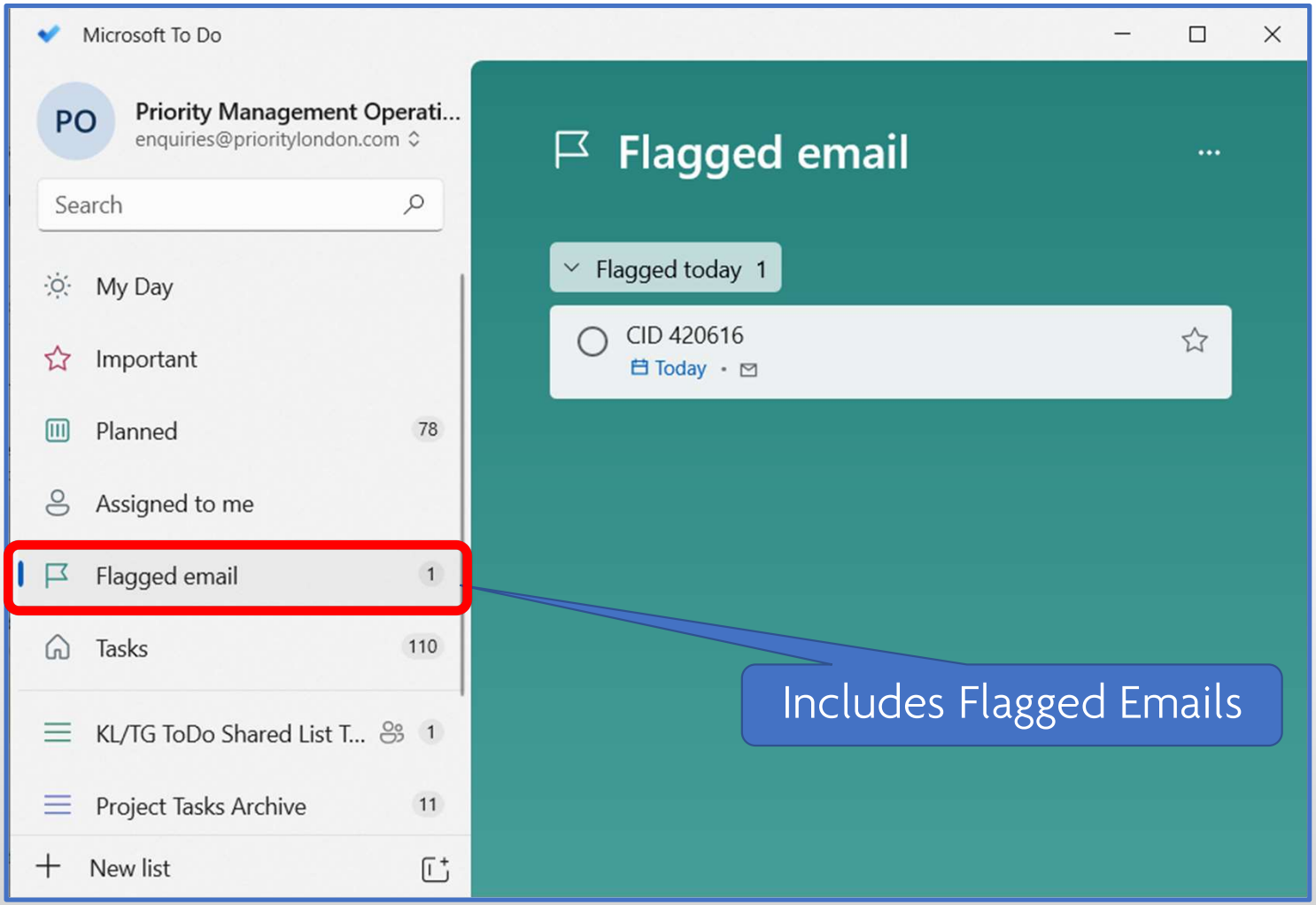
© 2022 Priority Management International Inc

Ex4

A Better Way To Work

Microsoft To Do App: ALL Tasks on multiple devices

Microsoft To Do



WorkingSm@rt

© 2022 Priority Management International Inc