



Tasks by Planner & To Do

The Tasks app brings a cohesive task management experience to Microsoft Teams, integrating individual tasks powered by Microsoft To Do and team tasks powered by Planner in one place.

Users can access Tasks as an app on the left side of Teams and as a tab in a channel within individual teams. My tasks and Shared plans in Tasks let users view and manage all their individual and team tasks and prioritize their work. Tasks is available in Teams desktop, web, and mobile clients.

In this workshop, we'll introduce you to Tasks by Planner & To Do and how to use the app to manage personal tasks, delegated tasks and team tasks.

Workshop Learning Outcomes

Once you've completed this training, you will:

- Learn how to add the Tasks by Planner & To Do app to your team channels to manage your team activities
- Understand how to create and manage personal task lists in Teams
- Create new plans in order to manage team tasks
- Delegate tasks and track their progress
- Learn how to group and filter your tasks

Overview of Tasks by Planner & To Do

- What is the Tasks by Planner & To Do app?
- Adding the Tasks app in Teams
- Adding the Tasks app to a Teams Channel
- Overview of the Tasks interface

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Working with Personal Task Lists

- Creating a new Task List
- Adding Tasks to your Tasks lists
- Creating and assigning labels to your tasks
- Adding files to your tasks
- Communicating with task delegates through the task comments
- Working with the various task lists (Tasks, Important, Planned and Assigned to me)
- Sorting and Filtering your tasks

Creating Shared Plans

- Creating a new Shared Plan in your Team Channels
- Adding tasks to your Plans
- Assigning tasks in your Shared Plans
- Working with the different task views (List, Board, Charts and Schedule views)
- Grouping, Sorting and Filtering your tasks
- Editing and updating your tasks

Managing your Shared Plans in Planner

- Creating new Plans in Planner
- Adding Plans to the Planner Hub
- Managing your plan settings (members, backgrounds, notifications and more)
- Copying a plan to be used as a template
- Managing your Task delegations in My Tasks

Workshop Format:

- Classroom: 9:00am - 12:00pm
- Live webinar: 1 three-hour session

*Includes

- A detailed learning guide
- Unlimited complimentary coaching

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