



## **Use the Tasks app in Teams**

Once you add the Tasks app to Teams, you'll find:

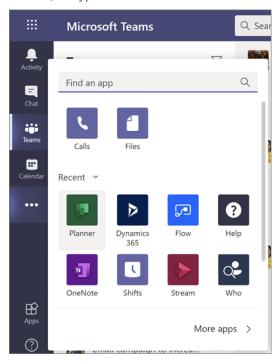
- My tasks: Which includes most of the lists from your To Do app, including tasks you've added in To Do and Outlook, and tasks that have been assigned to you in Planner.
- Shared plans: Which includes the Planner plans that have been added to Teams.

You can also use the Tasks app to:

- Add a plan to a Teams channel
- Edit multiple tasks using List view
- Get notifications about Planner tasks

# Add the Tasks app

There are several ways to add an app to Microsoft Teams. For now, the Tasks app will be called "Tasks by Planner and To Do", so type **Tasks** in the search bar and then select the tile that says **Tasks by Planner and To Do**.

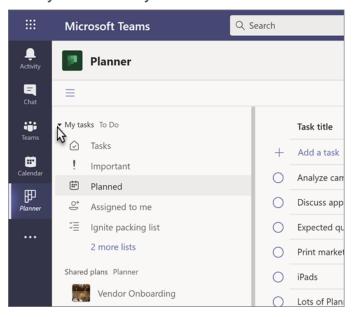


**Note:** If you don't see Tasks by Planner and To Do, your organization might not have the app turned on. Check with your admin to find out more.





# Track your tasks in My tasks



The **My tasks** section of Tasks shows you tasks that you've created or that have been assigned to you: everything in this list is yours to accomplish. It reflects most of what you see in To Do app:

- Tasks: A list of tasks that you've added either in Outlook or in To Do.
- Important: A list of all the tasks in To Do (including the Assigned to me list) that you've marked with a star.
- Planned: Includes all of the tasks in To Do (including the Assigned to me list) that have a due date, listed by date so you can plan your time.
- Assigned to me: Includes all of the tasks in Planner that have been assigned to you. This list will only show up if you've synced your Planner tasks to To Do.

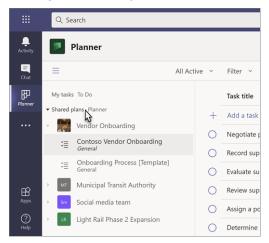
#### Notes:

- My tasks does not include the My Day or Flagged emails lists at this time.
- You won't be able to see recurrence for your To Do tasks in the Tasks app, but that information is still attached to those tasks and can be seen and worked with in the To Do app and Outlook.





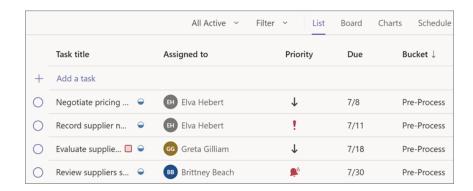
### **Track your Shared plans**



The Shared plans section of Tasks shows you plans that have been added to channels in Teams. You choose from a list of teams and channels, and find the plan you're looking for. You can then work with the plan as usual in Board, Chart, or Schedule view, or in the List view unique to the Tasks app.

#### List view

A unique feature of the Tasks app how it displays tasks and information associated with them in rows and columns. This is called List view, and allows you to change many tasks at once, which wasn't as possible in either To Do or Planner before. It also allows you to filter your tasks, which wasn't available to To Do previously.



#### Change many tasks at once

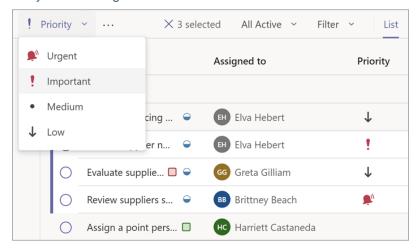
To change several tasks at the same time, or do a "bulk edit", follow these steps.

1. Select a task by clicking or tapping somewhere on the task that is not the Complete circle or the name of the task.





- 2. Press and hold the SHIFT key to select multiple consecutive tasks, or press and hold the CTRL key to select multiple nonconsecutive tasks.
- 3. Above the tasks list, on the left, choose **Progress**, **Priority**, or **Due date** and choose an option. You can also choose **More options** ••• and then select **Delete**, **Move task**., or more. Options can vary depending on the list you're viewing.



#### Filter your tasks

You can filter My tasks lists by due date and priority, and Shared plan can additionally be filtered by label, bucket, and assignment. Use these filters to find tasks, or to scope your view to more easily select a group of tasks to change.

#### Get notifications about Planner tasks

The Tasks app provides notifications for Planner tasks which will show up in your Teams activity feed both on your desktop and in the Teams mobile app. You'll get a notification when:

- Someone else assigns a task to you
- Someone else assigns an urgent task to you
- Someone else makes a task assigned to you urgent
- Someone else makes a task assigned to you not urgent
- Someone else changes the progress of a task assigned to you
- Someone removes you from a task's assignees

Click to watch the "Use the Tasks app in Teams" video.





#### Tasks for managers

Use Tasks in Microsoft Teams to manage your team's tasks anywhere and anytime.

## Manage tasks

- Create a task Assign a priority, set a due date, and add notes.
- Assign a task Assign a task to a specific team member, or leave it open for anyone to pick up.
- Filter tasks Track the real-time status of existing tasks to see tasks due today or tasks in a specific department.

Click to watch the "Tasks for managers" video.

#### **Tasks for First**

Manage and prioritize what needs to get done with Tasks in Microsoft Teams.

#### **Get started with Tasks in Teams**

Select Tasks in the Teams app.

#### Consult your tasks

- Tasks: Shows your assigned tasks or ones you've created.
- Important: Highlights tasks marked as important including the Assigned to me list.
- Assigned to me: Shows all your assigned tasks.

**Note:** This list will only show up if you've synced your Planner tasks to To Do.

## Modify a task

- Add a photo to a task and annotate it.
- Change a task's status.

#### **Review tasks**

Check and filter tasks for your entire team.

Click to watch the "Tasks for Firstline workers" video.





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# Tasks and Praise

# **Communication and praise**

Communicate and recognize your Firstline team with Praise and Microsoft Teams capabilities.

# Send praise to people

- 1. Select **Praise** in the Teams mobile app.
- 2. Choose a badge, add who you want to praise, and write a personal note.
- 3. When you're ready, select **Send**.

## Post and read messages in a public channel

- Post and respond to conversations in the public team channel.
- Increase a message's Priority to give it more visibility so it stands out in threads.
- Start audio and video calls with team members.
- Take and share photos with the smart camera feature and securely store them in Teams.

Click to watch the "Communication and praise" video.

For more information, please refer to the Microsoft training resource page HERE