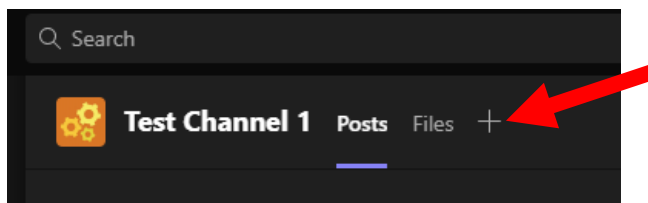


Managing Teams Project Boards (Planner)

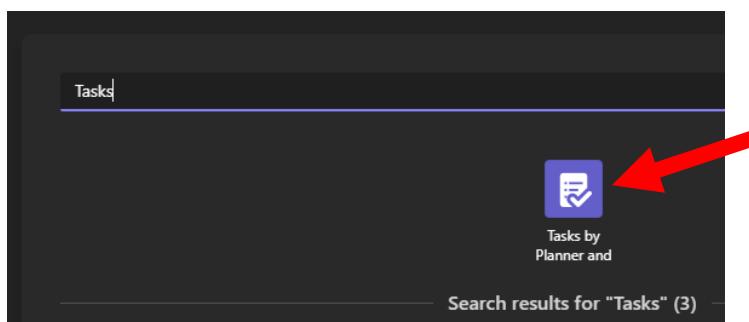
Table of Contents	
Adding a Project Board to the General Channel	1
Adding a New Task	2
Adding a Label to a Task	5
Adding a New Bucket	6
Viewing Progress Charts	7

Adding a Project Board to the General Channel

1. Navigate to the General Channel in your Teams.
2. At the top of the Teams window, click on the plus '+' icon to open the App finder.

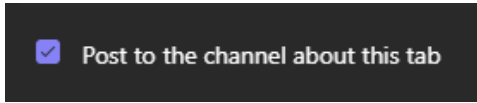


3. Search and select the **Tasks by Planner and To Do** app.



4. Make sure **Create a new plan** is checked. Then, enter in a name for the project board.

- (Optional) Uncheck 'Post to the channel about this tab' if you want to avoid making an automatic post about the channel being created in the Post tab.

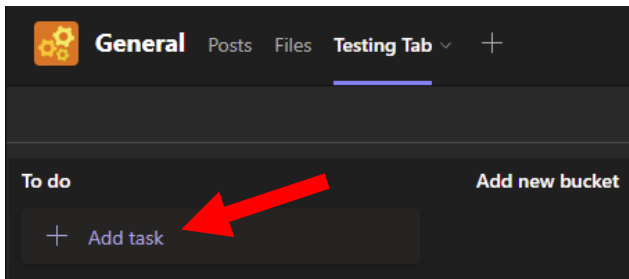


- Click **Save** to create the project board.

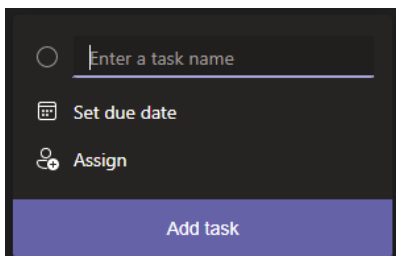
Note: Due to a Microsoft dev bug, a Task/Planner tab can only be added to the General channel of a Team. It cannot be currently added to a private channel in a Team.

Adding a new Task

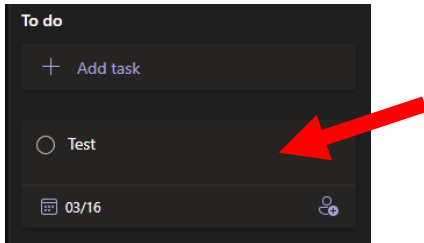
- Navigate to the Project Board tab in your General Channel.
- Under the desired bucket, click on the **Add task** button to start a new task.



- Upon clicking Add task a new area will appear. You can specify the following information:
 - **Task name:** the name of the task to be completed
 - **Set due date:** the date that this task will be due
 - **Assign:** the users responsible for the task (these users will receive notifications for that specific task. E.g. if it is overdue, or if it has been completed/updated)

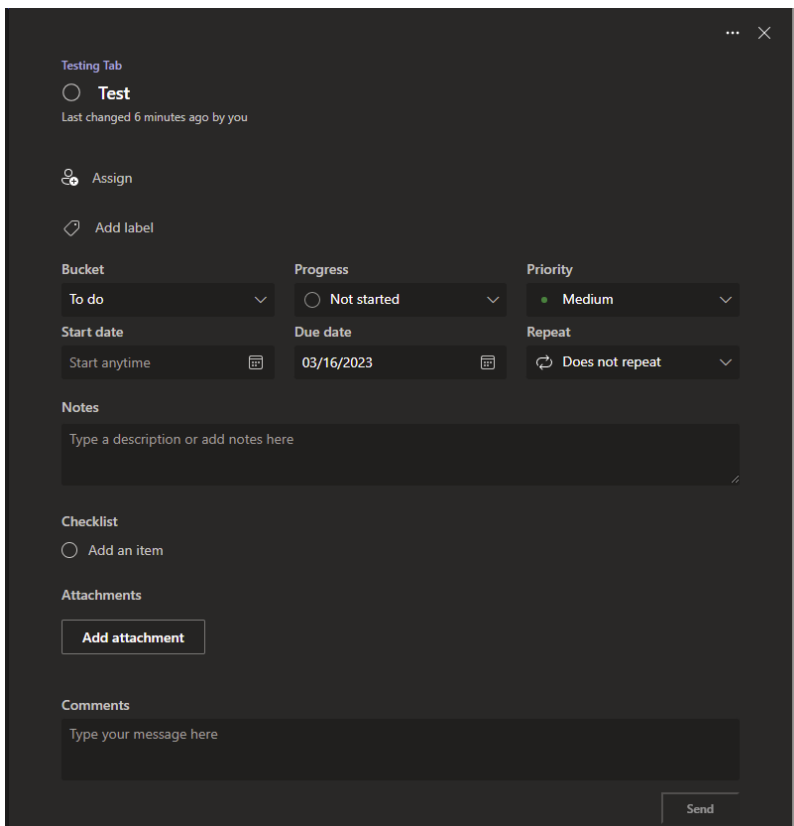


4. Click **Add task** to add it to the board. When added, it will appear under the bucket.

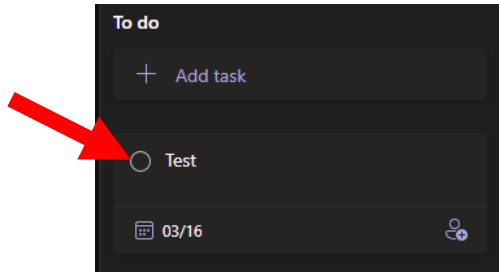


5. Clicking on the task will open the Details window for that task. You can specify the following:

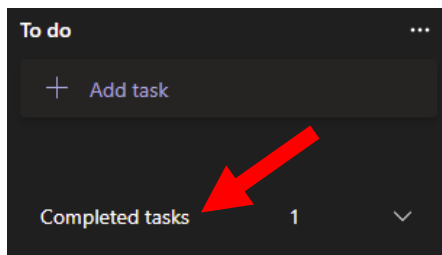
- **Add label:** you can add a label to the task to categorize it.
- **Bucket:** this dropdown allows you to change the bucket the task is in.
- **Progress:** allows you to set the progress for the task
- **Priority:** allows you to set the Priority of the task: Urgent, Important, Medium, Low
- **Start date:** the date this task will begin
- **Due date:** the due date of the task
- **Repeat:** if the task is to be repeated daily, weekly, monthly, etc
- **Notes:** any specified description or notes for the task
- **Checklist:** if you want to add sub-items to be completed prior to the task, you can add them to the checklist. E.g. if task is to 'make a cake' the items in the checklist will be 'gather eggs', 'gather milk', etc.
- **Attachment:** allows you to upload and attach any related files to the task
- **Comments:** any comments regarding the task. E.g. updates regarding the task



6. When the task is complete, you can click on the radio button next to the task name.



7. The task will then be put in a 'Completed tasks' area at the bottom area of the bucket and will be hidden from view.



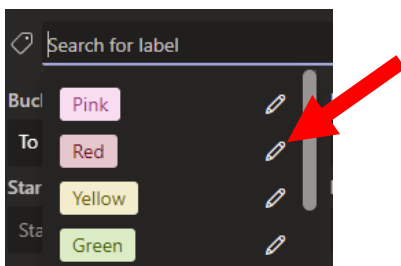
Note: Users assigned to the task will receive a Teams notification when the task is marked as completed.

Adding a Label to a Task

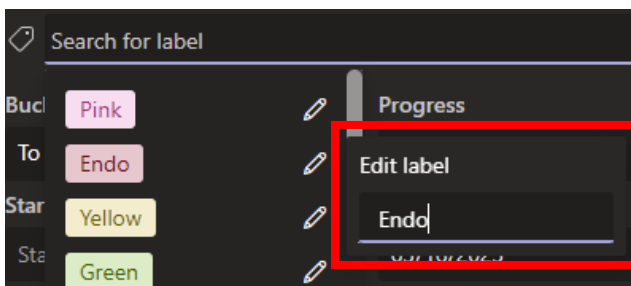
1. Navigate to the task's Details window. (Click on the task to open this.)
2. In the Details window, click on **Add label**



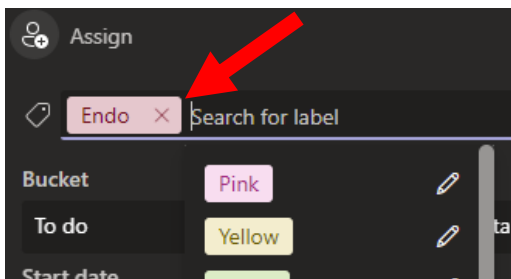
3. Click on the Add label button will open a dropdown list of different label colors. Click on the pencil icon next to the label color you want to use.



4. Type in the description of the label and hit **Enter**. This will set the description for that label color.

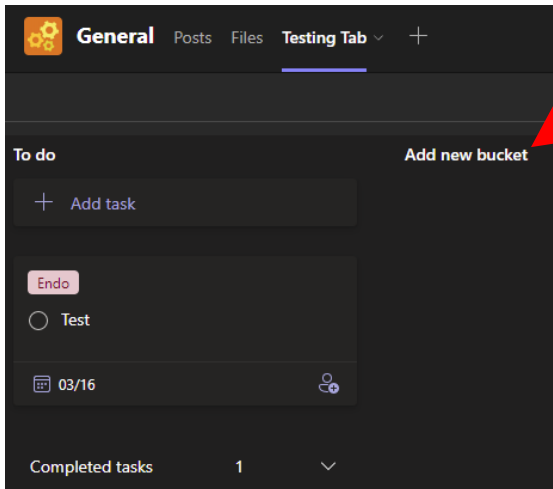


5. Click on the label to attach it to the task. It will now appear under the label area.

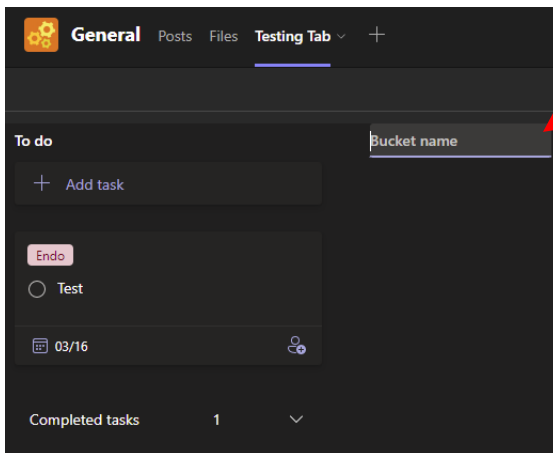


Adding a New Bucket

1. Navigate to the project board.
2. Click on **Add a new bucket**



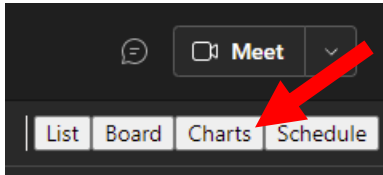
3. Clicking on Add a new bucket will prompt you to type in a description for the bucket. Type the description and hit **Enter**.



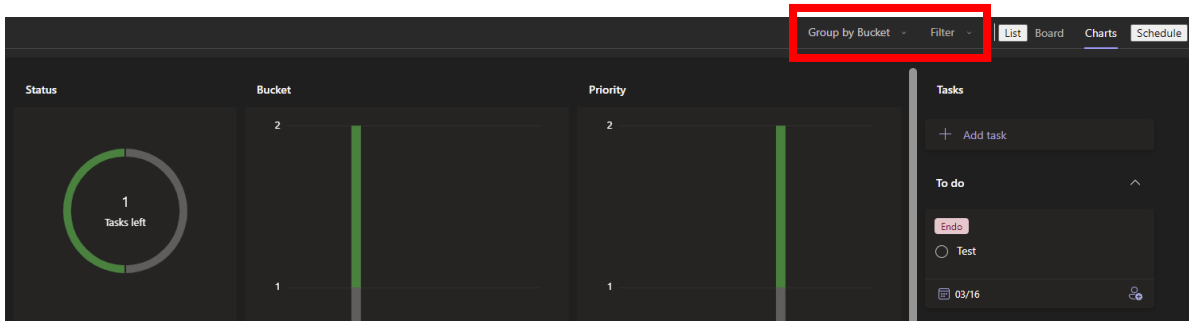
6. The new bucket will be created.

Viewing Progress Charts

1. Navigate to the project board.
2. Click on **Charts** at the top right of the window.



3. This will open that Progress Chart. You can use the **Group by Bucket** or **Filter** to change the view of the graphs. E.g. if you want to view the data for specific tasks by label, user, urgency, etc.



4. Click on the Charts button again to hide it when finished.