Nexus365 - Planner

Skills Toolkit

Planner is an on-line tool for a team of colleagues to structure and organise their work. It helps with teamwork and collaboration.

Suppose your group is working together to organise a summer school starting next July 10th.

In this task you will work together on a plan that has been provided with the Team. You will set up tasks and assign them to Team members, with details such as due dates. You will explore ways of keeping track of progress.

- Start *Nexus365*, and sign in using your Oxford single sign-on

- On the *Nexus365* homepage, start *Teams*

- Click at the left edge, to see all the Teams you are a member of
    We have set up a Team for today's workshop: be careful to stay in this Team for today

- Click on our Team name tile, then on the **Summer School** channel

- Click the "Summer school planning" tab, at the top of the Team
    A plan has been set up for all the participants in today's workshop to share
    All members of the Team can see and work on the Team's plan

- Look at any tasks that others have already set up, and add a new task:
    (For example, you will need to organise publicity, venue, sessions, refreshments)
    Click `+ Add task` if necessary, to start a new, blank task card

    Give a task name, set a due date and assign the task to someone, and `Add Task`
    On the board, drag task cards up and down to re-order them

- Assign some more details to a task:
    Click the name of an existing task, to open the task details
    Click and assign more people to the task (the people are the members of our Team)
    Give this task a Priority and mark its Progress level (but beware if you choose **Completed** the task card will be hidden)
    Type a message in the Comments box, explaining what is involved – click **Send** so the people will receive an email in *Outlook*
    Close the task card

- Buckets are useful for grouping together related tasks:
    Look at any buckets (categories) that others may already have set up
    Set up another bucket: scroll to the far right column, choose `Add new bucket` and type a new bucket name, then drag some relevant tasks into your bucket

- Keep track of the **Progress** of a task:

    Tick the circle beside a task name, if you want to mark it as completed

    The task now hides at the bottom, under `Show completed` (where you can untick it)

    At top right, change the way the tasks are grouped – by Bucket, by Assigned To, etc
    Group by Progress to see how all the tasks are progressing

- Review the plan in **Charts**

    Choose **Charts** at top centre, to see aspects of how the various tasks are progressing