

How to use Planner for Curriculum Review Stage 4 Tasks

Why are we using Planner?

You have identified as a team a number of tasks to take forward from Stage 2 of the Curriculum Review to Stage 4.

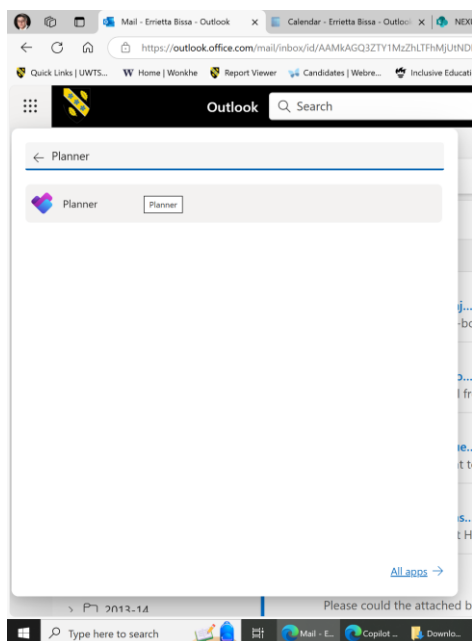
As you can imagine, all teams that go through Curriculum Review go through this process.

This creates a very large number of tasks, not just for team members, but also for relevant professional services units.

Planner helps in allocating tasks to individuals/teams, as well as keeping updates of task completions, changes, and progress.

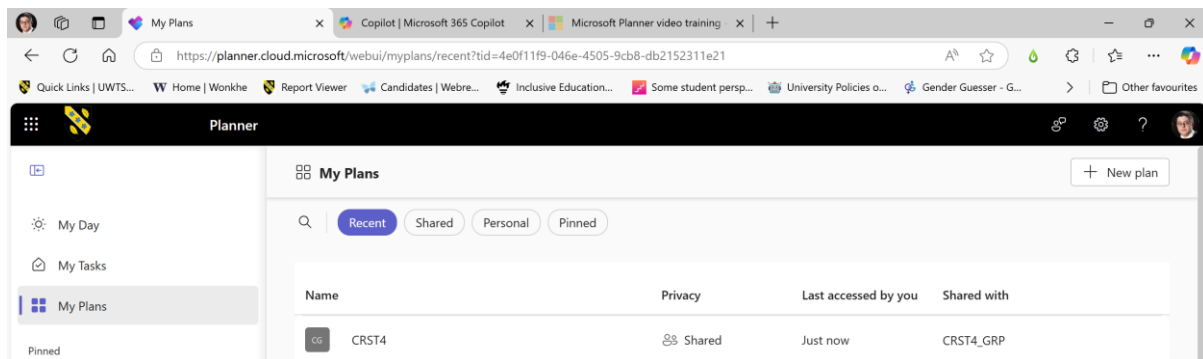
How will you access Planner?

You will be able to access the CRST4 Plan on Planner by accessing Microsoft Planner from a university computer or laptop:



You may be asked to log in – use your normal UWTSD credentials.

When you are in Planner, go to the My Plans tab:



There go to the plan CRST4.

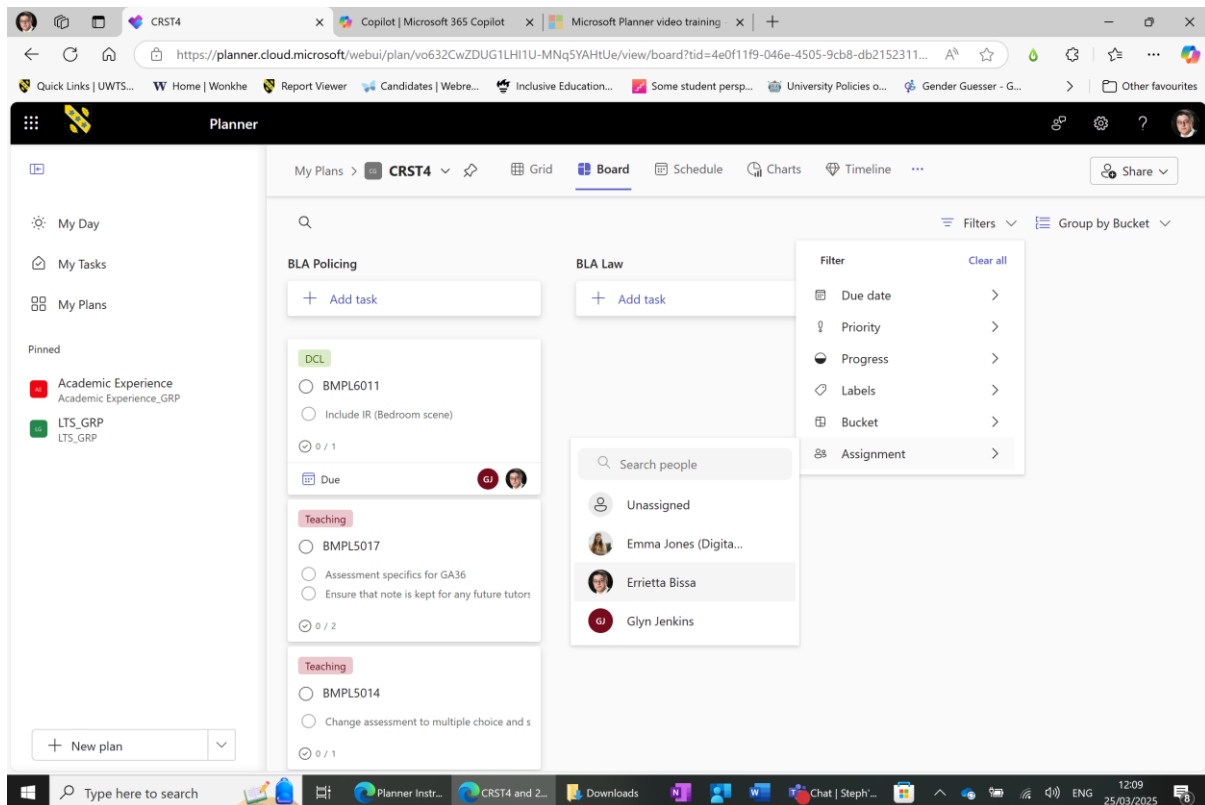
If you cannot see CRST4, please email e.bissa@uwtsd.ac.uk to be given access to the plan.

What is relevant to you in Planner?

The CRST4 plan is very big and includes many participants. Don't worry about all of that.

All you need to do is change the view using the Filter function to see the tasks that have been allocated to you.

Go to Filters, then to Assignment, then find your name (you can search for it).



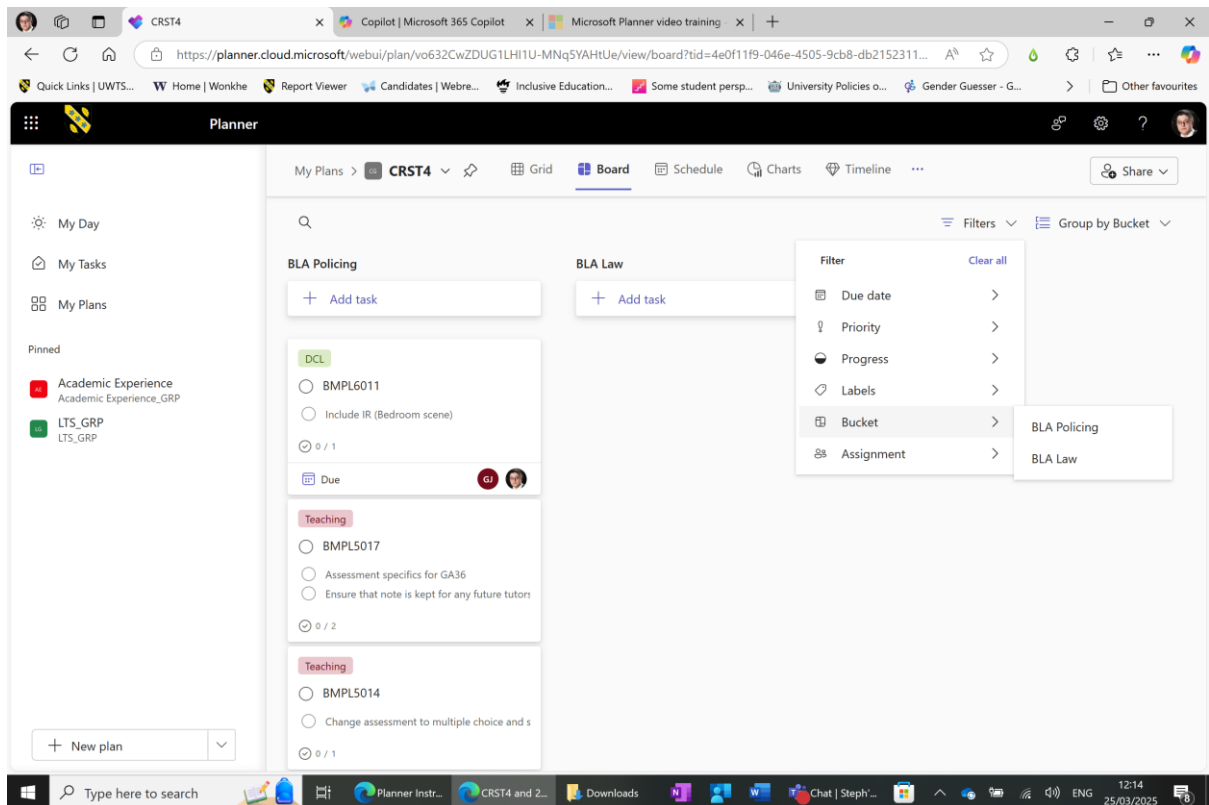
Remember that you may need to Clear the Filters (by clicking on Clear all) before making your choice – other colleagues are using this too.

When you filter, the number of tasks that you see will change to include **only** the tasks you have been assigned.

I need to see what is going on with my Programme or Discipline. What do I do?

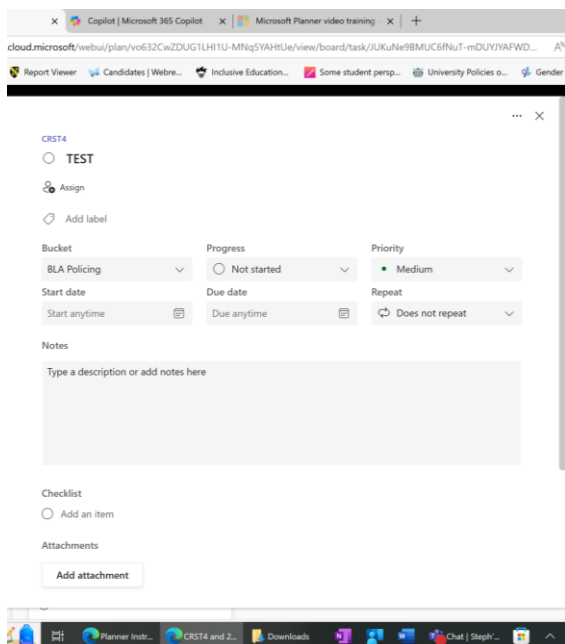
If you are a Programme Manager, Assistant Academic Director or Academic Director, you may want to see how things are going across your programme, discipline or area of responsibility.

You can use Filters again, but this time choose a Bucket rather than a person:



The Task Interface?

When you click on one of your Tasks, you will open the Task Interface:



The parts of the Task Interface

The Task Interface has several parts:

1. Task Name
2. Assignees (i.e. who has been assigned this task). **You can add people here.**
3. Label: we use this for specific professional services teams or parts of CR – **please do not change the label!**
4. Bucket: This is the part of the project, i.e. the programme, discipline or sub-discipline. **Please do not change this.**
5. Progress: This is where we identify whether this task has been started, is in progress, is delayed or is completed. **You can change this for your tasks.**
6. Priority: This is the priority/urgency label; we primarily use this to alert teams that something is important or has to be completed urgently. **Please do not change this.** If you think that the priority/urgency level is incorrect, please make a note in the Notes section (and initial it).
7. Start date: This date identifies when the task is supposed to start. You will have identified a start date as part of the Curriculum Review Sprints. This date may change, based on the dependencies of the task. **You can change this date.**
8. Due date: This date identifies when the task is supposed to be complete. You will have identified a completion date as part of the Curriculum Review Sprints. This date may change, based on the dependencies of the task. **You can change this date.**
9. Repeat: **Ignore this;** we are not using repeat tasks for this project.
10. Notes: This is where we make notes of any changes to the task, such as if you change start or completion dates, etc. Please do not make changes to the task unless you make a note of it in the Notes section.
11. Checklist: This is very important! The checklist are the tasks within the task; i.e. all the steps we need to complete for the task. This checklist will have been pre-populated for each task, but **you can add items to the checklist as you identify what needs to be done and when.** Please try to keep the checklist in chronological order; so, first things first. You will also need to tick off when any item in the checklist is completed – this way we will all be able to see how the task is progressing.
12. Attachment: **Use this** to upload documents or any other information to the task as necessary.
13. Comments: **Do not use this part of the interface!**

The image shows a task management interface with several fields and sections. Labels with lines pointing to specific areas are as follows:

- Task Name**: Points to the title "TEST".
- Assignees**: Points to the assignee "Errietta Bissa".
- Label**: Points to the "Add label" button.
- Progress**: Points to the "Progress" dropdown menu.
- Priority**: Points to the "Priority" dropdown menu.
- Bucket**: Points to the "Bucket" dropdown menu.
- Start date**: Points to the "Start date" field.
- Notes**: Points to the "Notes" text area.
- Checklist of items**: Points to the "Checklist" section.
- Completion Date**: Points to the "Due date" field.
- Attachments**: Points to the "Add attachment" button.

The interface includes a "Repeat" button with a red prohibition sign, a "Comments" section with a red prohibition sign, and a "Checklist" section with an "Add an item" button.

How do I make changes in a task?

1. Make the change you need, including:
 - a. Start and End dates
 - b. Add or change checklist items
 - c. Add or remove an assignee
2. Make a note of your change in the Notes section
3. Add Errietta Bissa as an assignee (yes, please do this every time you make changes; this helps me keep an eye on things)

This is my first time on the Plan. What do I do?

Please do the following:

1. Identify the tasks assigned to you.
2. Check the priority, start and due dates: Make a note if there is a problem with any of these in the NOTES section of the Task Interface
3. Check the Checklist:
 - a. Are all the necessary steps there? Add them if they are not
 - b. Identify what steps you need to take first and make appropriate arrangements.

I did a task or item on the checklist. Now what?

Mark it as complete!

You should continue with the appropriate checklist items or tasks. The Planner is there to help you until all the tasks are completed.

Remember!

If you get confused or stuck, please ask. Email e.bissa@uwtsd.ac.uk or TEAMS message.