Pocket Planner Installation Guidance

Pocket Planner

0. Pocket Planner introduction

Pocket Planner is a tool that allows you to **sync tasks** from the Microsoft To Do app on your mobile phone into your Microsoft Teams Planner using **voice commands**. This means that whether you are travelling to work, moving between meetings, or out visiting patients, you can **easily keep your planner up-to-date**. Please note that for now voice commands for Pocket Planner are only available for **iOS devices with Siri**.

Getting started with Pocket Planner

This guidance will take you through the Pocket Planner installation process, offering step-by-step instructions with screenshots. **Before getting started, you will need to ensure the following**:

- ✓ Your NHSmail user policy permits access to **Microsoft Planner**
- ✓ Your NHSmail user policy permits access to **Microsoft To Do**
- ✓ Your NHSmail user policy permits access to **Microsoft Power Automate Flow**
- ✓ You have a **Team** set up in Microsoft Teams, which will be the home for your Planner app (If you do not currently have a Team where you can add your Planner, you can request a new Team to be created on https://portal.nhs.net/. You can learn more about how to do this in the Support Site user guidance on creating a new Team.)

If you are unsure about any of the above pre-requisites, talk to an IT administrator in your organisation.

You should receive an email from Microsoft Flow notifying that the Pocket Planner flow template has been shared with you. You will need the flow template at Step 4 of the installation process.
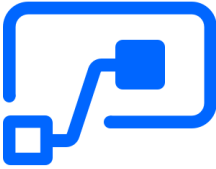
Set up overview

First, you'll **set up your Planner board** in Microsoft Teams.

2 min

Second, you'll **set up the Microsoft To Do app** on your mobile.

3 min

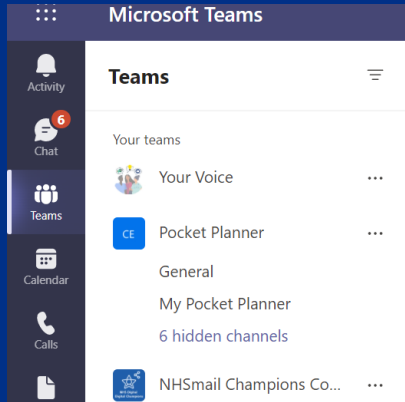Third, you'll **submit a form** that will help you personalise your Pocket Planner flow.

5 min

Finally, you're going to **personalise your Pocket Planner flow** and you are all set!
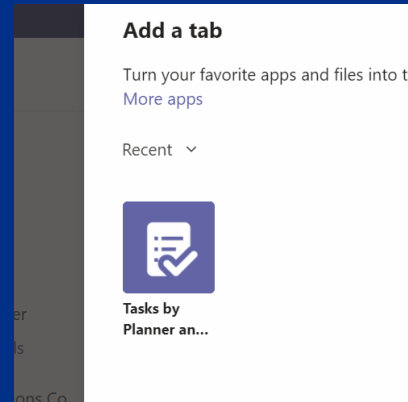
5 min

4

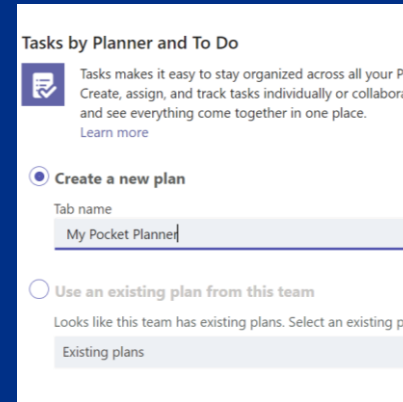# Step 1: Setting up your Planner Board in Teams

1. Choosing a home

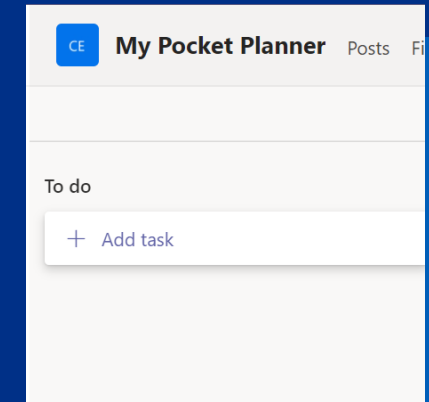Choose which Microsoft Teams Team and Channel you'd like your planner board to be in.

2. Adding Planner

Press the "**+**" button in that channel to add the Tasks by Planner app.

3. Name Your Planner

Choose a name that makes sense to you and your team for your planner board.

4. Customise!

Choose names for each of the sections or 'buckets' on you board – and make sure everybody you want to has access to the Team.

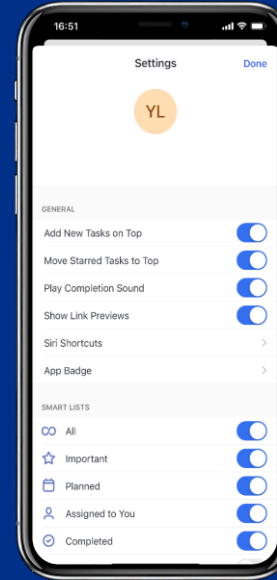# Step 2: Setting up Microsoft To Do on your phone*

1. Download the App

Find the **To Do app** in the App Store and download it. Open the app and log in with your @nhs.net email address.
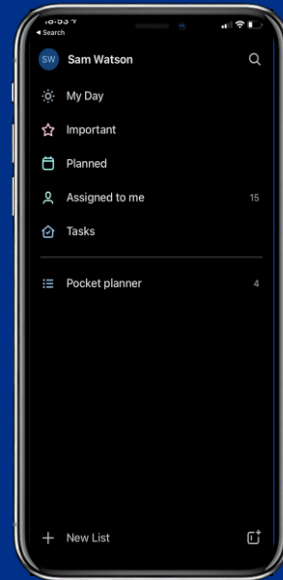
2. Create a List

Press the "**New List**" button in the bottom left corner to create your first list. Give it a name that makes sense to you.

3. Set up Siri

First, make sure that Siri is enabled on your iPhone by going to phone settings. Then go back to the To Do app and click on your name at the top of the home screen to open app settings. Find "**Siri Shortcuts**" and create one for "**Add Task**". Record a phrase to add a new task to your list.

4. Hey Siri!

Try it out! Add your first task to the To Do app – and check that it shows up in the right list.

In a later step, we will link it to your Planner board.

* Please note that for now voice commands for Pocket Planner are only available for **iOS devices with Siri.**

Step 3: Submitting the configuration form

1. Open the form

Once your Planner board and To Do app are set up, **click the button below** to fill out a few questions about how you want to use your Pocket Planner. This will help personalise your Pocket Planner flow in the final step.

Go to form

## 2. Submit and save the details

Once you go through the quick instructions on how to submit the form, you will arrive on the app's home screen. Click on "**Add new Pocket Planner**" and **fill out the questions**, then click "**Submit.**"

Once you submit the form, you will be directed back to the app's home screen as shown above. Check that your new Pocket Planner details are saved there. Choose the option to **email yourself the details** you enter in the form, as **you will need them in the final step of the setup**.

Follow the steps in the next section to finish the setup.

# Step 4: Personalising your Pocket Planner flow
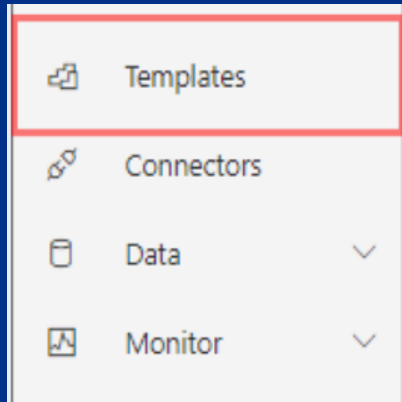
1. Go to Microsoft Flow and open the flow

You will have received an email from Microsoft Flow notifying that the Pocket Planner flow has been shared with you, click on the 'Create My Flow' button in the email or go to **flow.microsoft.com** in your browser. Log in with your @nhs.net email. Click on "**Templates**" on the left hand side and navigate to the "**Shared with me**" tab. Open the Pocket Planner flow template.
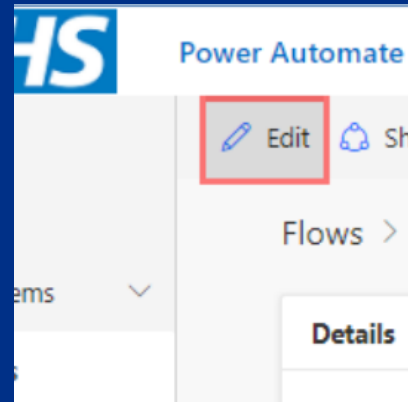
2. Edit the flow pt. 1

Once you open the flow template, click on "**Create Flow**." You will be directed to a new screen. Click on "**Edit**" at the top left corner. This will take you to a page where you can view and edit the steps of the flow.
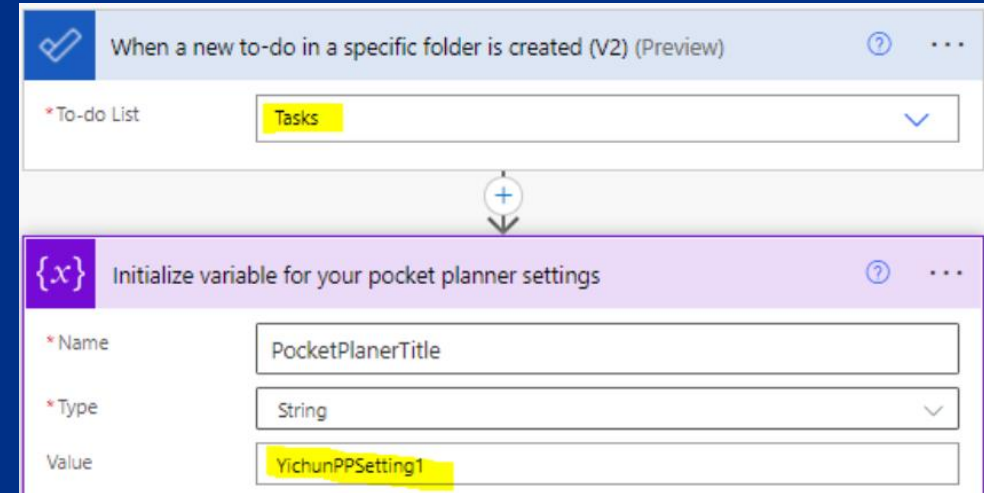
3. Edit the flow pt. 2

You will only need to edit the 1st and 2nd steps of the flow. Click on the 1st step to expand it, then remove the existing text from the field. Using the dropdown menu, select the Microsoft To Do list, which you want to use for Pocket Planner. **This should be the same list you entered earlier in the form.** Refer to your completed form if you need to verify the details.

4. Edit the flow pt. 3

Expand the 2nd step of the flow and remove the existing text from the "Value" field. Type in the name of your Pocket Planner (this is the name you created earlier when you submitted the form). Click "**Save**" at the bottom of the page!

Step 4: Personalising your Pocket Planner flow cont.
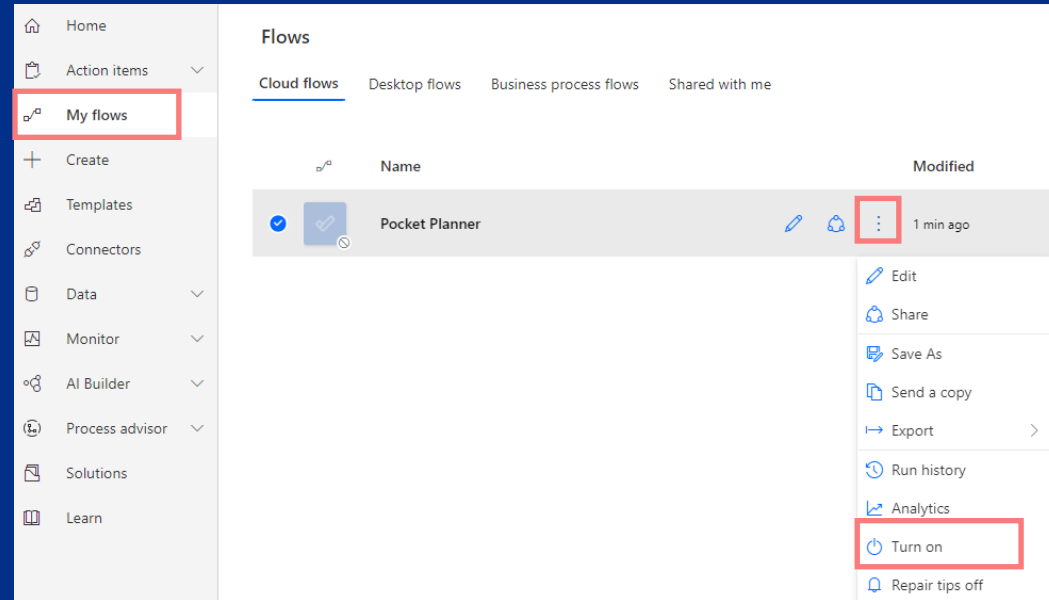
5. Turn on the flow

The flow should be automatically activated once you save it. To verify this, click on "**My Flows**" on the left-hand side. Navigate to the newly saved flow and click on the three dots. If the flow is not yet activated, press "**Turn on**" to activate your new Pocket Planner. If it is already activated and it says "Turn off" in the dropdown menu, you do not need to do anything else.

You are all set!

Your Pocket Planner should be ready to use now. You can test it by telling Siri the voice command to add a new task.

After a few moments, check that your new task appears in the right place on your Planner board in Microsoft Teams.

To learn more about Pocket Planner, **visit the Support Site guidance**.

Reach out to nhsdigital.coe@nhs.net if you have questions, would like further assistance, or to leave feedback.