

Real People, Real Tools:

Microsoft Planner for Task management



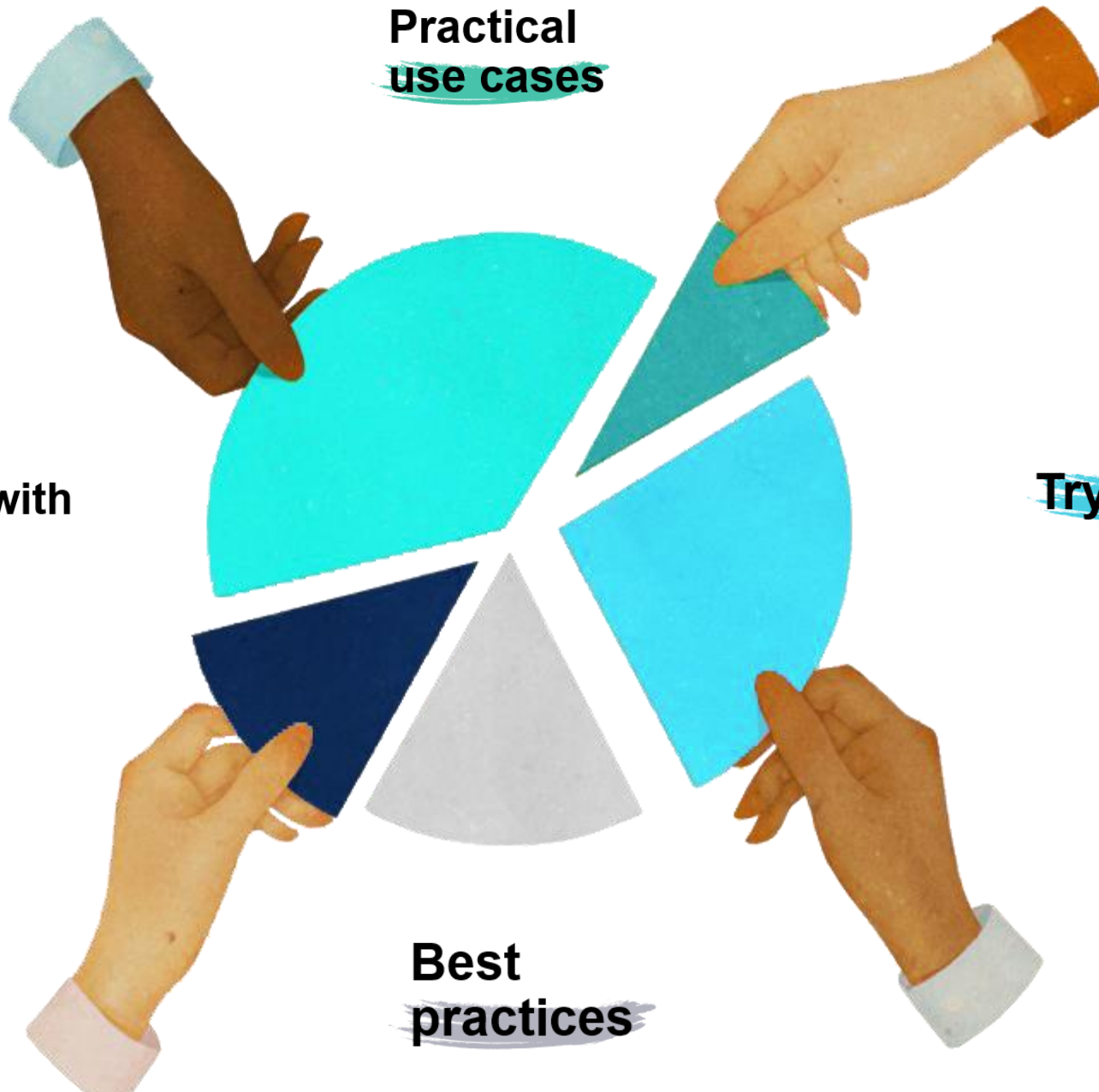
UseIT at **SFS**

**Getting
started with
Planner**

**Practical
use cases**

Try it out!

**Best
practices**



**Getting
started with**

Planner

What is Microsoft Planner?

Additional **Premium**
features & templates 🏠

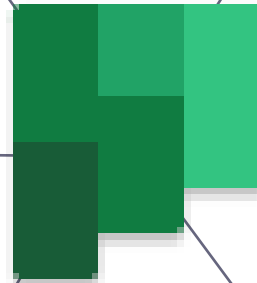
New version currently
available only **in Teams**

Easily view all your tasks
on *Assigned to me* and pin
plans for easy access.

Task management tool for all
tasks in the Microsoft 365
environment

For **personal and shared**
tasks and projects

Easy to **add tasks and create**
plans from scratch or templates



Live demo

Different Planner versions

Feature	Planner on the web	Planner (basic) in Teams	Planner (Premium) in Teams* 
Different views for managing tasks assigned to you across plans	✓	Only Grid	Only Grid
Manage with Mobile app	✓	Only via Teams app (older version)	
Integration with Project for the Web, Outlook & To Do		✓	✓
Advanced options for plans (e.g. copy plan, export to Excel etc)	✓		✓
Task dependencies, timeline, Customized Grid view, Goals, Workloads, CoPilot..			✓

* You need at least Project (Planner) Plan 1 to access Planner premium features.

Try it out!



1

Create a **Plan** and set it up with **Buckets**



2

Create a **task** and set it up to **repeat on the second Monday of every month.**



3

Create a **template card** for a frequent task with a **checklist** and add **all the information** you would need to complete it



4

Create a **new task using the template** and **assign** it to yourself

Best

practices



- **Define what “completed” looks like**
- Always select a **due date and prioritize** accordingly
- **Assign each task** to a person. If there are multiple people involved, name a lead.
- Categorize the tasks with **buckets and labels and add notes and attachments**
- Use a **checklist** to clarify sub-tasks
- Create **task templates** for regular and repeating tasks
- Use **comments for questions and additional notes**
- Track progress with **chart view** and regular status checks.