

Quick Tips for Microsoft Planner

What is Planner?

Microsoft Planner is a lightweight task and project management tool included in Microsoft 365 that was released a decade ago. In 2025, Microsoft incorporated **Project Online**.

It's designed for:

- Small Teams,
- Personal and side projects,
- Event Planning, and
- Ongoing Operations

When to Use Planner

Use **Planner** when you need:

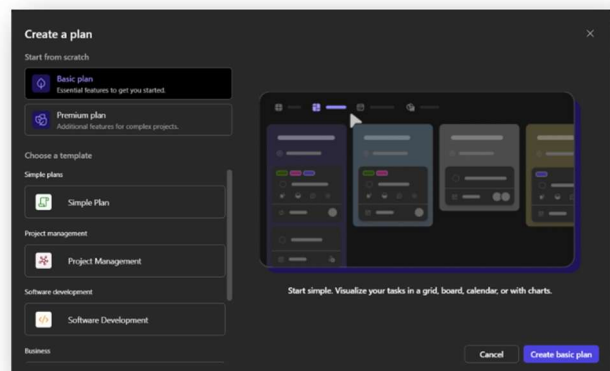
- A shared task board
- Team collaboration
- Simple tracking across related tasks



Get Started Fast

To access Planner, take the following steps:

1. Go to the **Waffle Menu (App Launcher)**.
2. Select **Planner** (or go to **More apps**.)
3. Click **Create a Plan**.
4. Choose:
 - a. **Start from Scratch** OR
 - b. Use a **Template**



More Task Tips

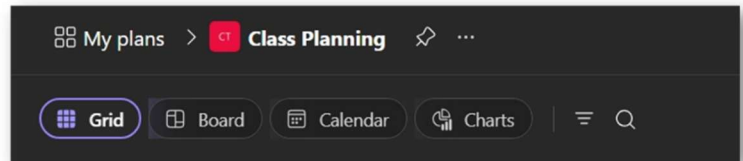
Start simple and don't overbuild your plan. Here are few quick tips to help you get started:

- Create tasks in **Grid**, **Board**, or **Calendar** View.
- Open a task to add more details.
- Break large projects into smaller tasks.
- Create templates for tasks that have irregular repetition patterns.
- Link tasks together to show relationships.

Views

You can work with your tasks in the **Grid**, **Board**, **Calendar**, or **Chart** view.

- **Grid** → simple list view
- **Board** → visual Kanban workflow
- **Calendar** → timeline view
- **Charts** → quick dashboard summaries

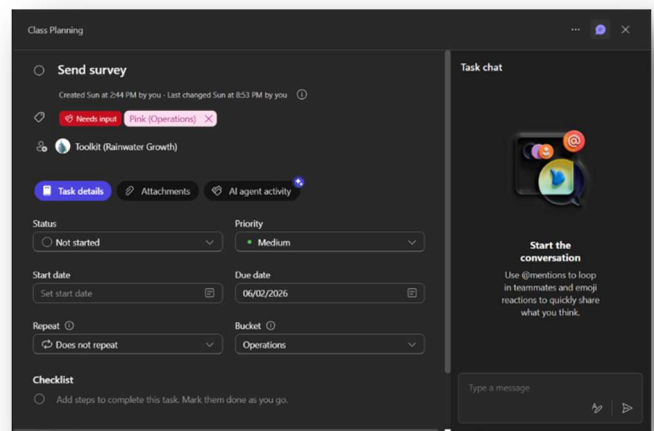


 **Tip:** You can filter each view by **Assignment**, **Labels**, **Priority**, **Bucket**, **Status**, and **Due Date**.

When you are in **Board** view, you have additional options.

Group work by the details you provided:

- Assigned To
- Bucket
- Priority
- Status
- Due Date



Integration

Planner connects with:

- **Teams** → Add the **Planner** app to Teams
- **To Do** → Assigned tasks show up in **Assigned to Me**
- **SharePoint** → Each Plan creates a **SharePoint** site and is connected to a **Microsoft Group**
- **Power Automate** → Use can use the **Planner**, **Group**, and **SharePoint** connections
- **Copilot** (features available with M365 Copilot or Premium Planner license)
 - **Planner Agent** can create plans and provide status updates.

Take Action



Planner helps you organize work, increase transparency, and save time but only if you use it.

This week:

- ☐ Pick one process
- ☐ Create and assign tasks
- ☐ Add deadlines
- ☐ Share with your team