



M365 Planner Essentials

For team tasks and project management



What does Superhighways do?

Superhighways helps small charities and community groups gain essential digital and data skills backed by the right tech to achieve their goals.





What we'll cover today

- ✓ Planner use cases
- ✓ Setting up a Plan (via the browser)
- ✓ Adding and assigning tasks
- ✓ Labels
- ✓ Views and Filters
- ✓ Planner in Teams
- ✓ Planner workflows





To do

+ (Add new task button)

In progress

+ (Add new task button)

Evaluation

15/06



Kate White

Done

+ (Add new task button)

Book venue



Contact all speakers



Finalise agenda



Order lunch



Add new bucket

Hide completed 2



Create Sway round up

22/06



Completed by Sorrel Parsons on 21/06

SWAY

Aim - 1) to share back with attendees - embedding resources & adding links out to Step by step guides etc Focus on 1st section and then just slides from other speakers
2) To share with those who didn't attend -





Filters

Group by Bucket

Q4 - Feb 24

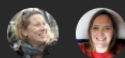
Add task

Data / security best... **Training**

- Bitesize - 5 priorities cybersecurity sessions
- Write copy for sessions & schedule dates Oc

0 / 1

Due



Planning & choices **Research & learning**

- Capturing learning from LEAH strategy & feeding back

Due



Q4 - Mar 24

Add task

Back office systems... **Training**

- Office 365 training review & schedule
- Agree sessions & descriptors / copy
- Schedule ahead Sept - Jan

0 / 2

Due



Completed tasks 1

Q4 - Apr

Add task

1:1 support

- One to ones overspill
- [redacted] Margaret - Teams training
- [redacted] Lee - dom
- [redacted] anti virus conversation

0 / 3

Completed tasks 1

Q1 - May

Add t

Completed

How are you managing your tasks
and projects now?





Microsoft 365 help & learning

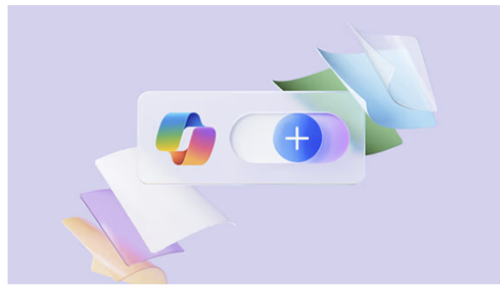
How can we help you? [→](#)

Supercharge your day with Copilot



How to get Copilot

Make your day even easier with Copilot in Microsoft 365 apps.



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Learn about AI credits and feature limits for each Microsoft 365 plan.



Turn ideas into action

Draft, summarize, analyze, and explore ideas with Copilot Chat.



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Access to your AI assistant and favorite apps from your mobile device.

Get more done in your favorite apps



Microsoft 365 Copilot app



Outlook



Word



PowerPoint



Teams



Excel



OneNote



OneDrive

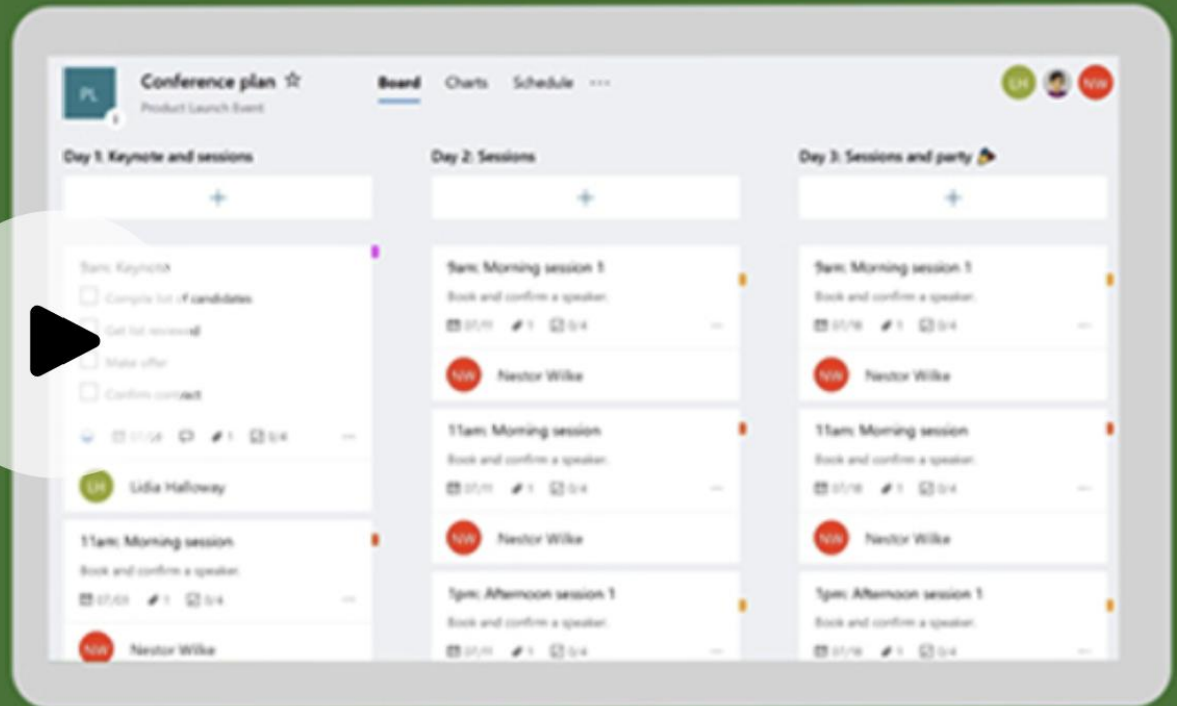


Clipchamp



SharePoint

Build your plan in Microsoft Planner



A quick summary

- ✓ Use to manage projects and collaborate with your team
- ✓ Add your own Buckets (columns) e.g. To do, In progress, Completed or Jan, Feb, March etc
- ✓ Add tasks and allocate to colleagues & set deadlines
- ✓ Add checklists, upload files and make comments
- ✓ Colour code / categorise tasks
- ✓ View as buckets, as a calendar or filter on e.g. categories, tasks allocated to you, outstanding tasks
- ✓ [Planner help & learning page](#)
- ✓ [Planner short videos training](#)



Linked apps

Planner

- ✓ Team task management
- ✓ Used for projects and team collaboration

To Do

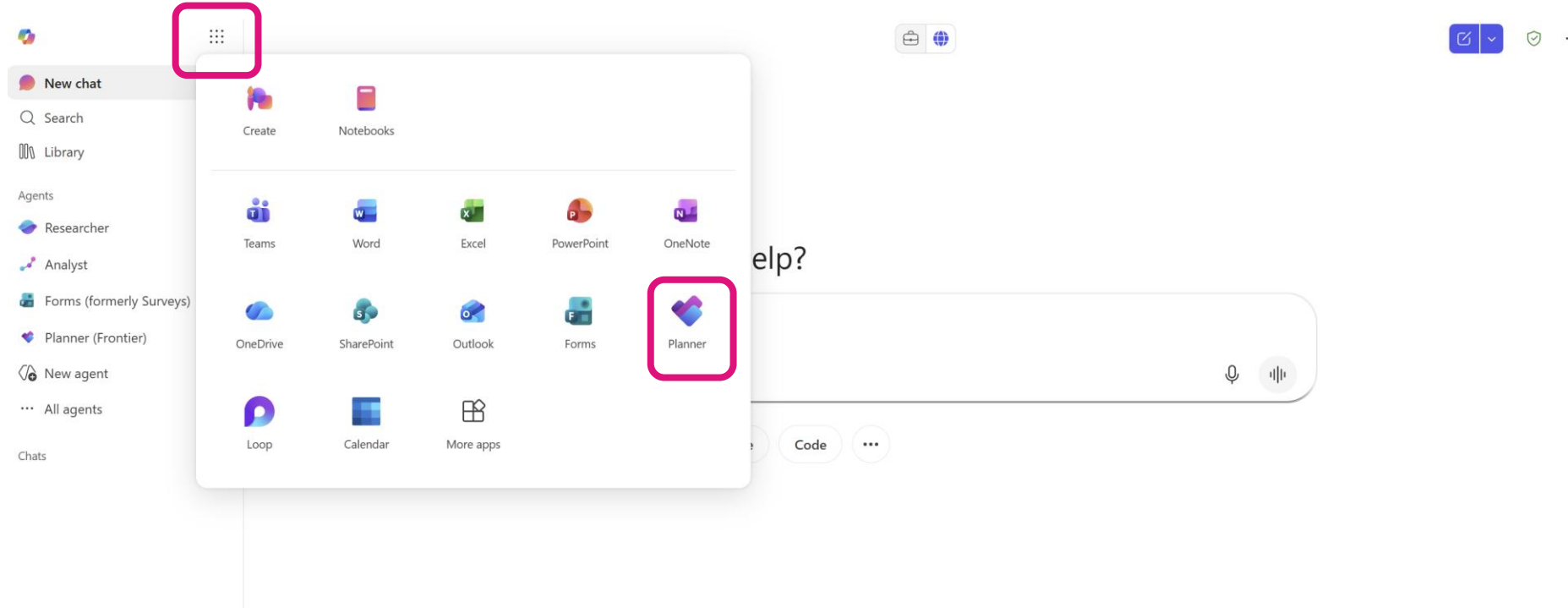
- ✓ Personal task management
- ✓ Your individual to-do list
- ✓ Use My Day for daily prioritisation
- ✓ Includes reminders, due dates, flagged emails

Planner and To Do connect

- ✓ Planner tasks flow into To Do automatically
- ✓ When someone assigns you a task in Planner it will appear in To Do under Assigned to me



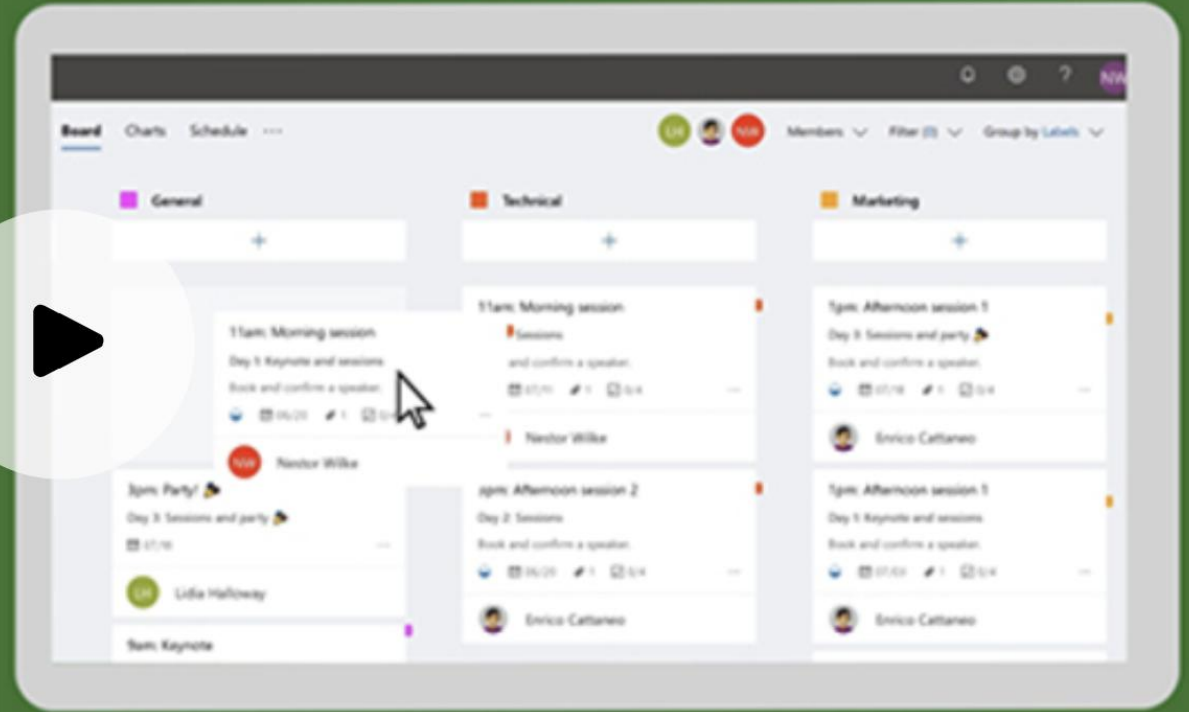
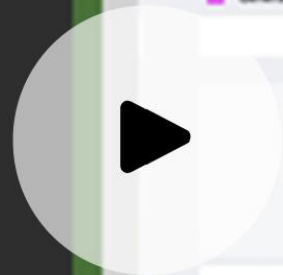
New M365 landing page



- ✓ Click on the Apps launcher (grid of 9 dots) in the top left
- ✓ Click more apps to see the full list and search option
- ✓ Pin apps to appear in the launcher (hover over and click on 3 dots)



Manage your tasks in Microsoft Planner



M365 app integrations and workflows

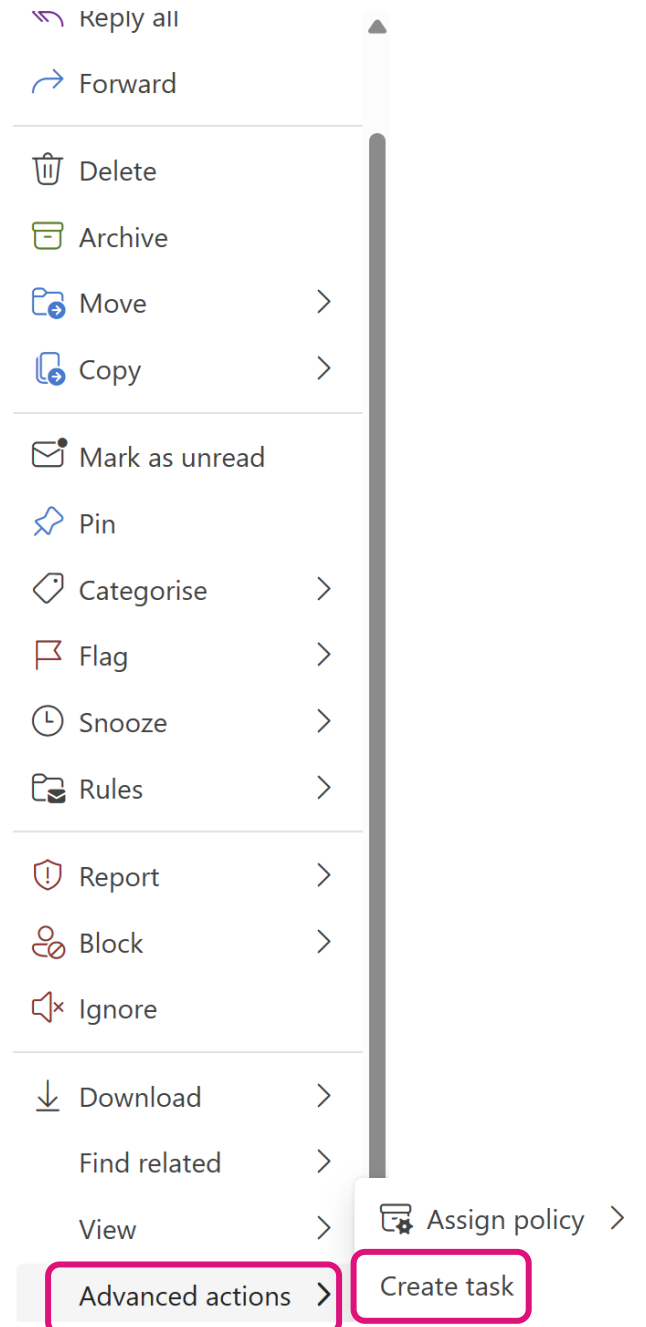
Trigger	Becomes in Planner
Teams message	Task
Email	Task
Form submission	Task
Meeting notes	Task
Database/list entry	Task

You can also set for an update to show in Teams when a Task has been completed in Planner.



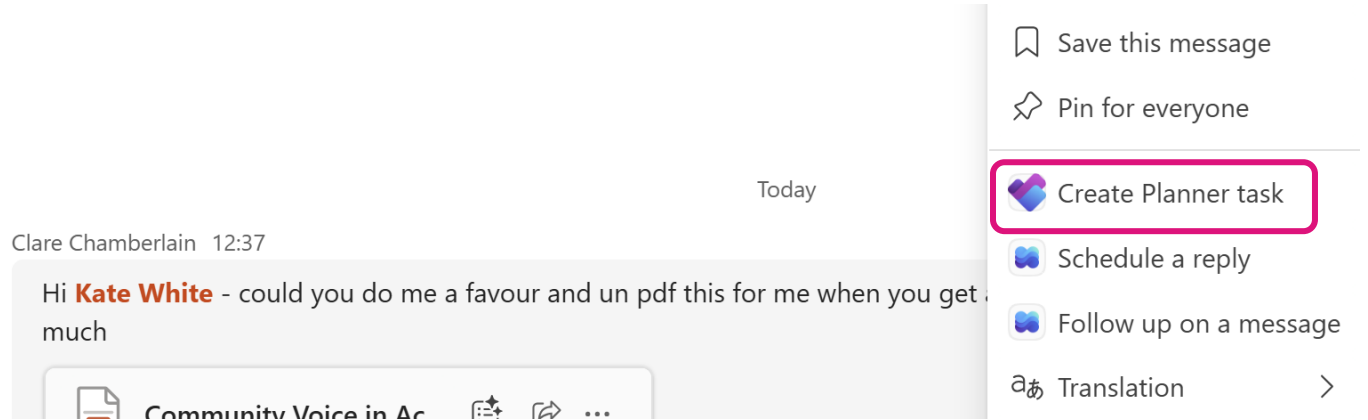
Creating a task from an email

- ✓ Right click on the email in the list in your Inbox
- ✓ Scroll down and click on Advanced action
- ✓ Click on Create task



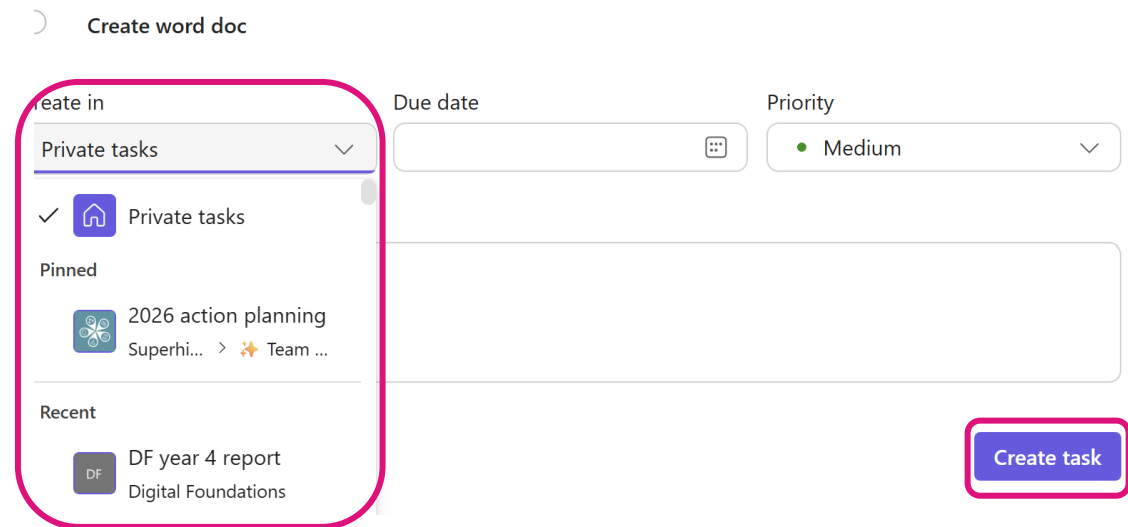
Creating a Planner task from a Team Chat

- ✓ Right click on the Chat message and select Create Planner task



- ✓ Now select the Planner you want to add the task too

- ✓ Then click on Create task



About Superhighways....

A project of Kingston Voluntary Action, we provide digital, data & tech advice, support & training to the sector, including:

- ✓ Tech support
- ✓ Training
- ✓ Websites
- ✓ Digital, data & tech strategy
- ✓ Digital inclusion
- ✓ Digital leadership
- ✓ Digital / data consultancy
- ✓ Datawise London legacy site



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Thanks for listening



superhighways
harnessing **technology** for **community** benefit

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