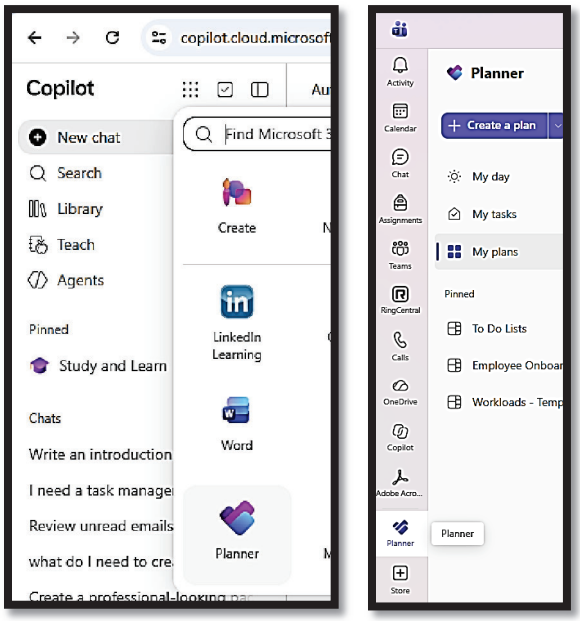
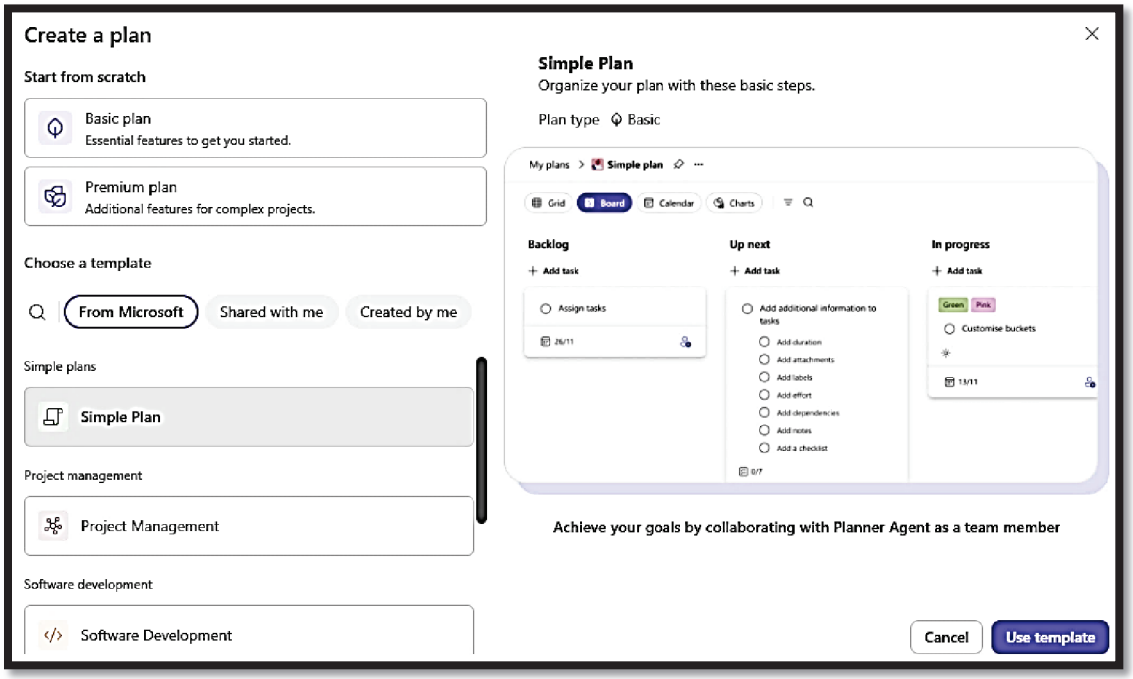
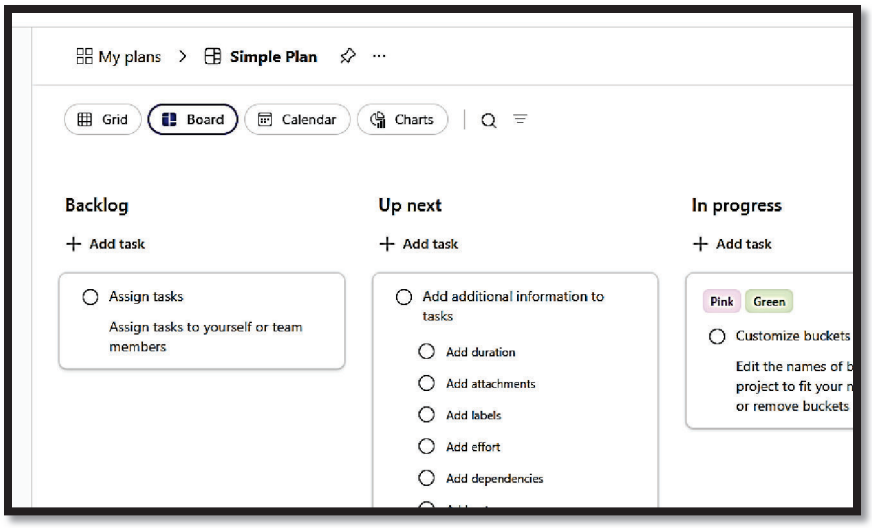
Creating a Plan in Planner

Planner can be opened from the Microsoft website (www.office.com), or from the Teams home screen.

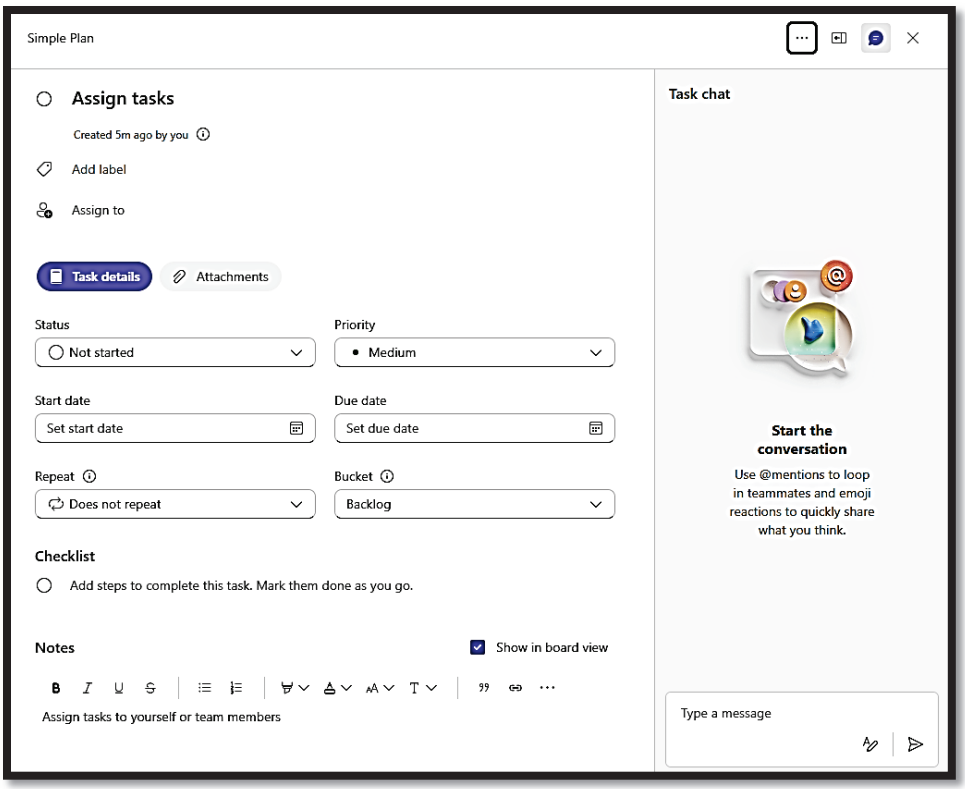


Click on the Create a Plan button and choose the desired template: Simple Plan, Project Management, Software Development, Business Plan, or Employee Onboarding. Click Use Template. Enter the plan name, and, if sharing with a group or Team, do so on this screen. Sharing can also be done later. The plan will be created and appear on the screen. It will also be available through the My Plans list.

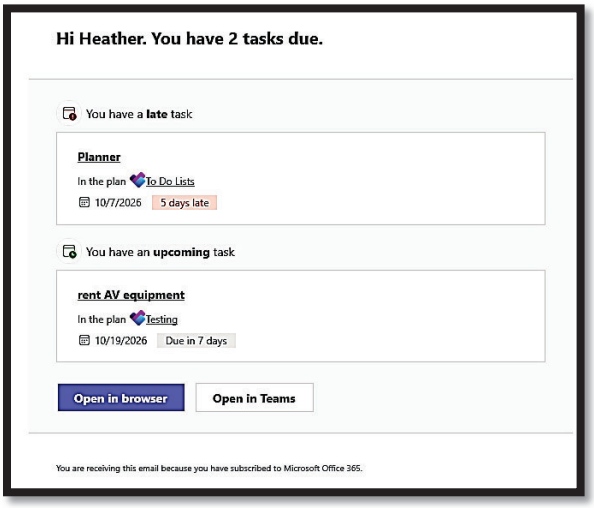




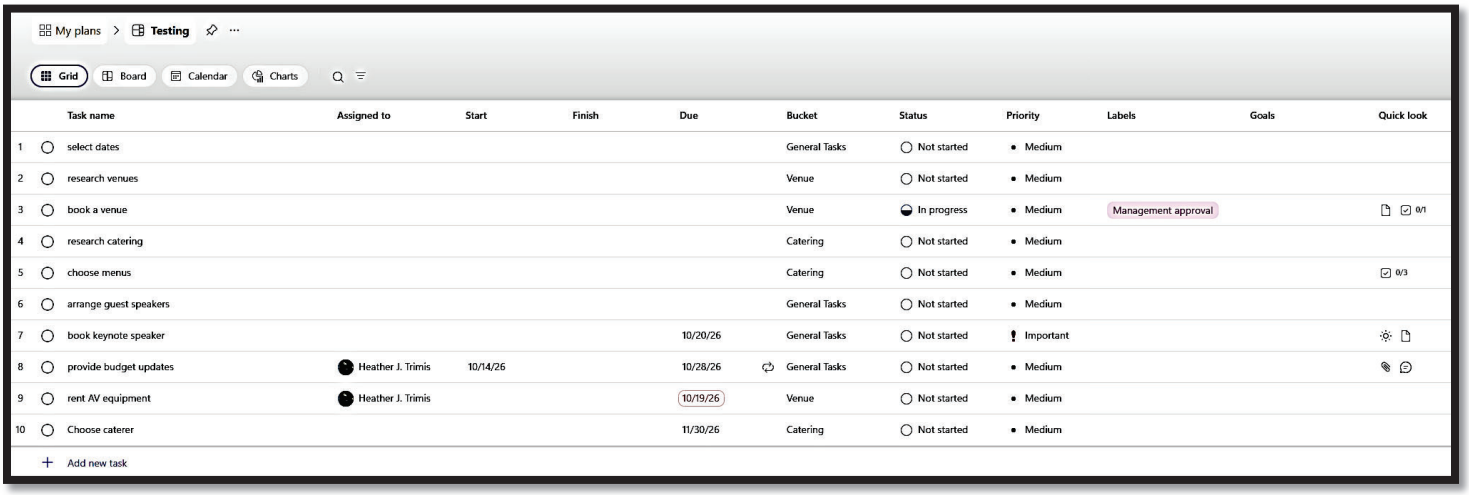
The Board view is the default setting. It shows all the tasks in buckets, which can be renamed and reordered. Buckets can also be added and removed. Click the Assign Task button in the appropriate bucket and add the task. Clicking the tile after the task has been entered opens it and provides additional options, such as assigning the task to an individual (must be shared with a group/Team), due dates, priority, status, and steps to complete the task. There is also a notes section for background information. The Show in board view option can be used for the Checklist or the Notes, but not both simultaneously. Clicking this option will show that information on the tile while in Board view. Labels can also be created and added – for example, management approval required. Files can be attached if needed. Chats between group members can be held within the task.



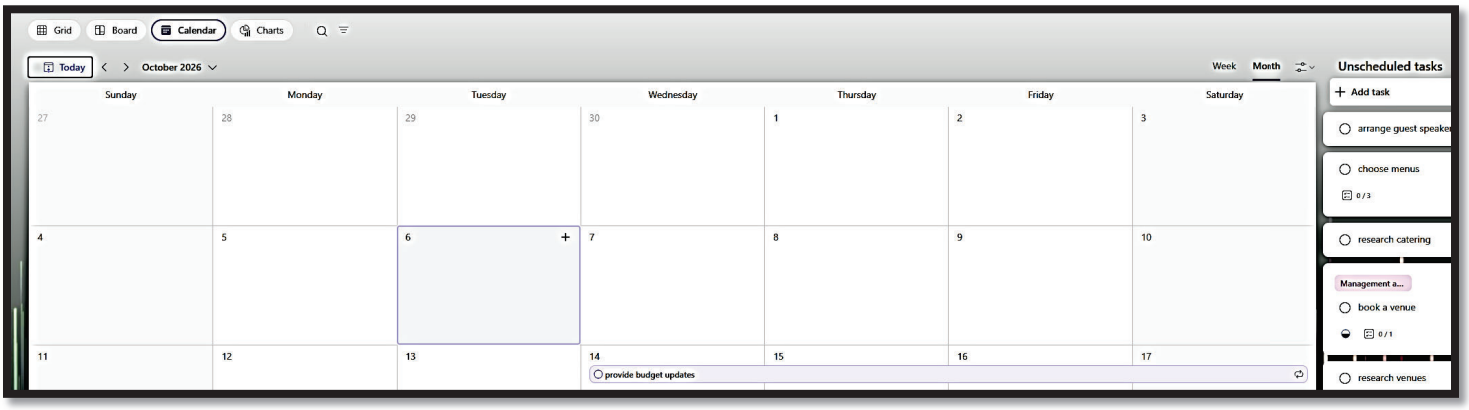
If due dates are assigned, the system will send emails before the task is due, when the task is due, and when it is overdue.



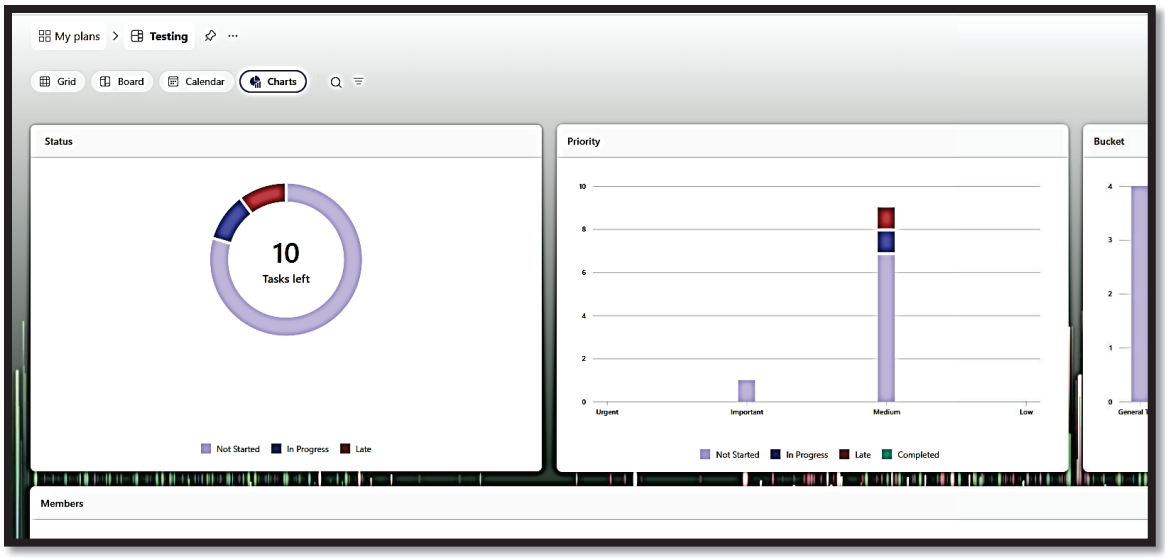
Grid view shows the tasks in a list that can be filtered, organized, and updated.



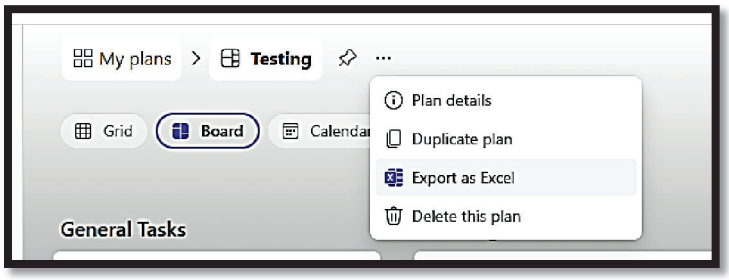
Calendar view shows the tasks with due dates, and lists the unscheduled tasks on the far right side of the screen.



The Charts view shows tasks by status using pie charts and bar graphs.



The Plan can also be exported to Excel for reporting purposes.



B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Task Name	Bucket	Goal	Status	Priority	Assigned To	Created By	Created Date	Due date	Start date	Is Recurrin	Late	Completed Da	Completed By	Completed	Checklist Items
select dates	General Tasks		Not started	Medium		Heather J. Trimis	2026-10-07				false				
research venues	Venue		Not started	Medium		Heather J. Trimis	2026-10-07				false				
book a venue	Venue		In progress	Medium		Heather J. Trimis	2026-10-07				false			0/1	Steps can be seen in the
research catering	Catering		Not started	Medium		Heather J. Trimis	2026-10-07				false				
choose menus	Catering		Not started	Medium		Heather J. Trimis	2026-10-07				false			0/3	Determine menu types: b
arrange guest speakers	General Tasks		Not started	Medium		Heather J. Trimis	2026-10-07				false				
book keynote speaker	General Tasks		Not started	Important		Heather J. Trimis	2026-10-07	2026-10-20			false				
provide budget updates	General Tasks		Not started	Medium	Heather J. Trimis	Heather J. Trimis	2026-10-07	2026-10-28	2026-10-14		false				
rent AV equipment	Venue		Not started	Medium	Heather J. Trimis	Heather J. Trimis	2026-10-07	2026-10-19			true				
Choose caterer	Catering		Not started	Medium		Heather J. Trimis	2026-10-12	2026-11-30			false				

Clicking on My Tasks on the left side of the screen will show only the tasks assigned to you.

