# Microsoft

# How to use Tasks and Planner to Support Time Management

Quick Reference Guide

## Microsoft Planner in Action: Stay on Track, Every Task, Every Day

Need a fast, visual way to manage tasks and stay organised? Microsoft Planner makes project tracking simple across Microsoft 365. Start by creating a new plan, add tasks with due dates, assign them to your team, and organise everything using buckets and color-coded labels. Use filters and views like Board, Schedule, and Charts to track progress at a glance. You can even prioritise tasks with **"My Day"** and see all your assignments in **"My Tasks"**. With Planner, managing work becomes more collaborative and clearer. Open Microsoft Planner today and take control of your projects—one task at a time!

### Create a New Plan

Select **"New Plan"**. Choose template (if needed) > Name Plan. Select **"Add to my pinned plans"** if you want this to appear Pinned in the left menu.

+ New plan

Create a basic plan from scratch ✕

Name *

Type a name

☐ Add to my pinned plans

Add to a group (optional) ⌄

Create

### Create a New Task

Select **"Add task"**

- Add task name.

- Set due date.

- Assign a task by entering name or email address.

+ Add task

○ Enter a task name * (required)

🗓 Set due date

👤➕ Assign

### Organise Buckets
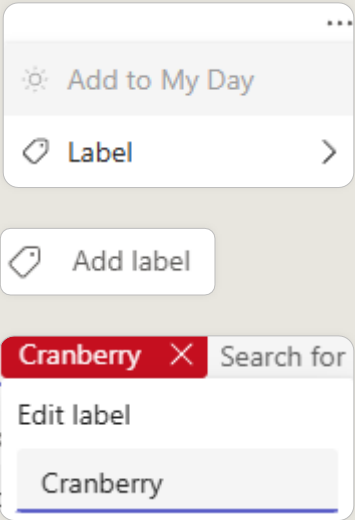
Select **"Add a new bucket"** and provide a name.

Add a new bucket

## Use Labels

Select three dots in task window > Label > select **"Label"**.

Same can be done by opening task and selecting **"Add label"**.

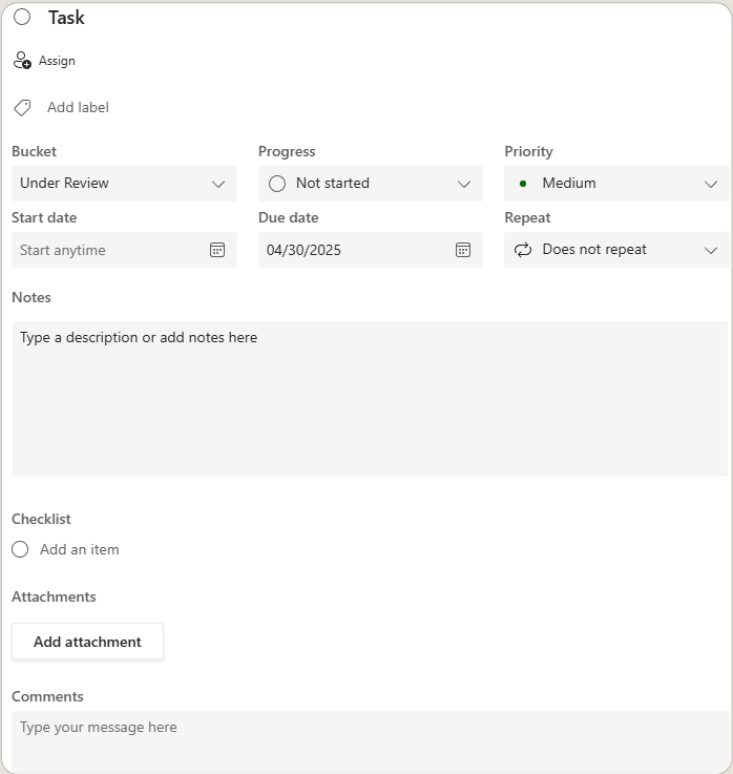Once label name is applied, it will be available for future tasks.

## Edit Task Details

Double click to open task.

Assign or change priority > due dates, add notes or attachments.

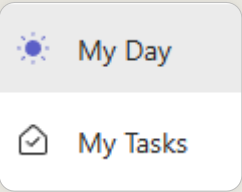Assignee can edit progress, enter a star date, add notes or attachments.

## Personal Tasks

Select **"My Day"** in left menu to view tasks in a clear overview or **"My Tasks"** to view active, in progress and completed tasks.



## Planner View

Select from the different options to view your plans.



## Utilise Filters and Views

Click on **"Filters"** located in the top right corner to see all tasks based on your selections.

Choose **"Group by Bucket"** to organise buckets in a specific manner.