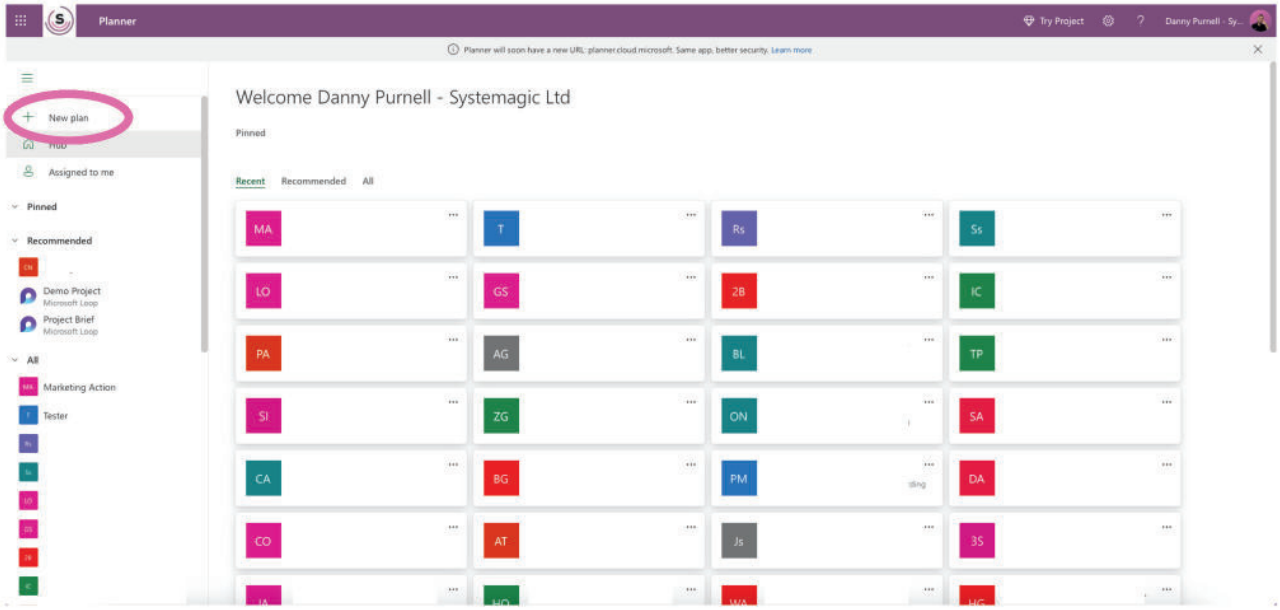
SYSTEMAGIC
DOING IT DIFFERENTLY

GETTING STARTED WITH MICROSOFT PLANNER

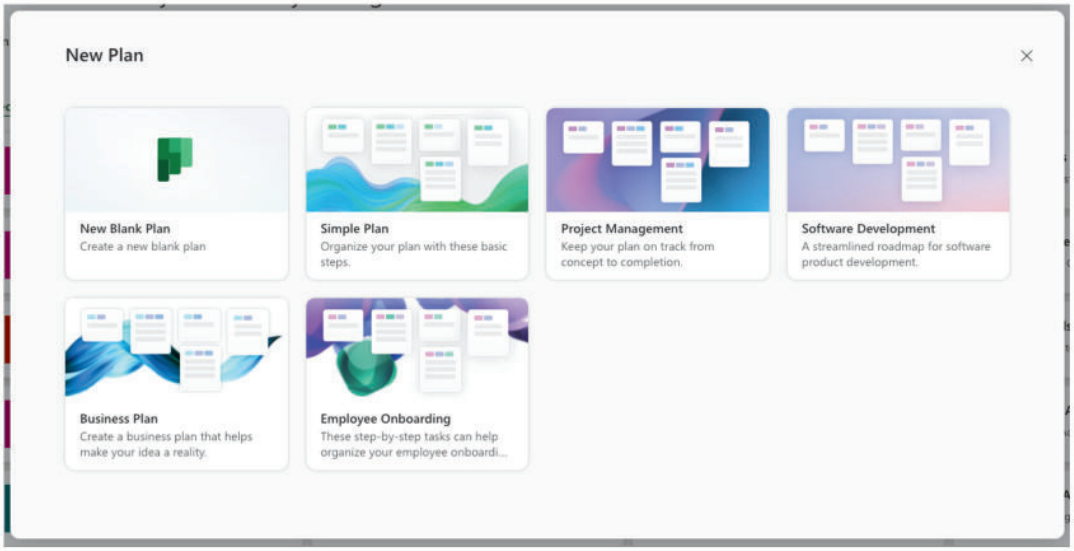
Getting Started

When you first open Planner, you will be presented with a blank screen with the option to create a 'New Plan' as shown on the screenshot below.



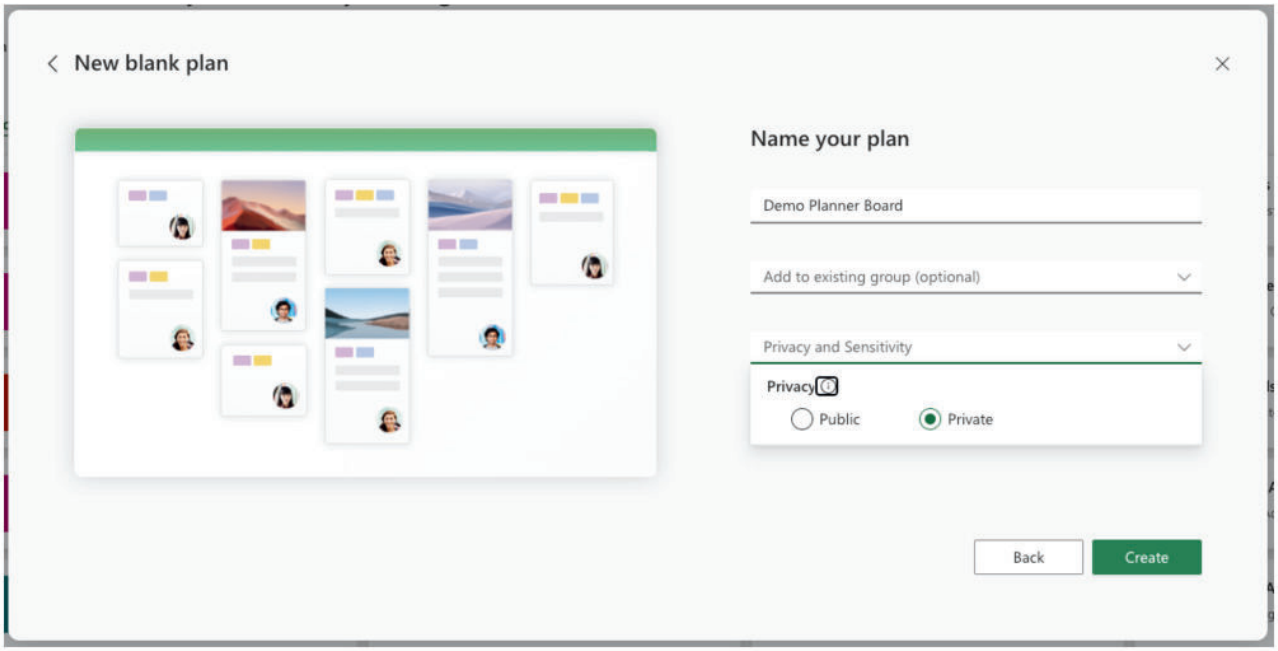
Choosing a Template

When you create a new plan, you can choose to import a template, or create a plan from scratch - depending on your needs.



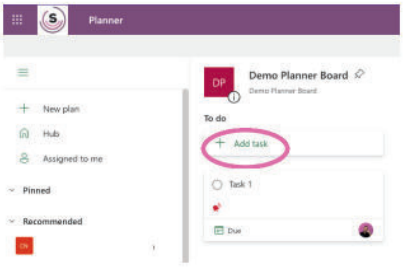
Title & Privacy

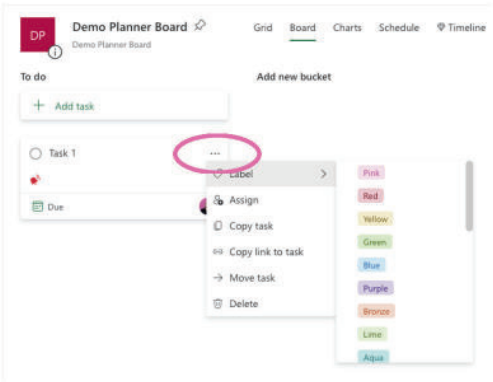
When you click 'Blank Template', you'll need to type in a name for your plan and choose the security settings. You can choose for your plan to be accessible by anyone in your org, or by invite only.

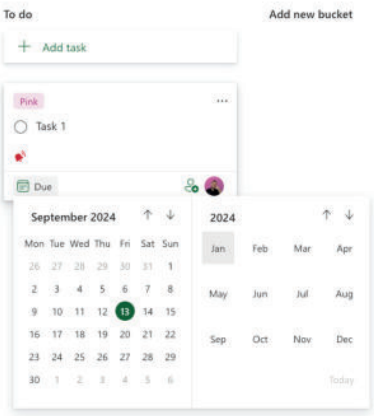


Adding a Task

To add a task, click 'Add Task' and enter a title. Once the card has been created, click on the 3 dots to add extra info, assign a category, or set a due date.

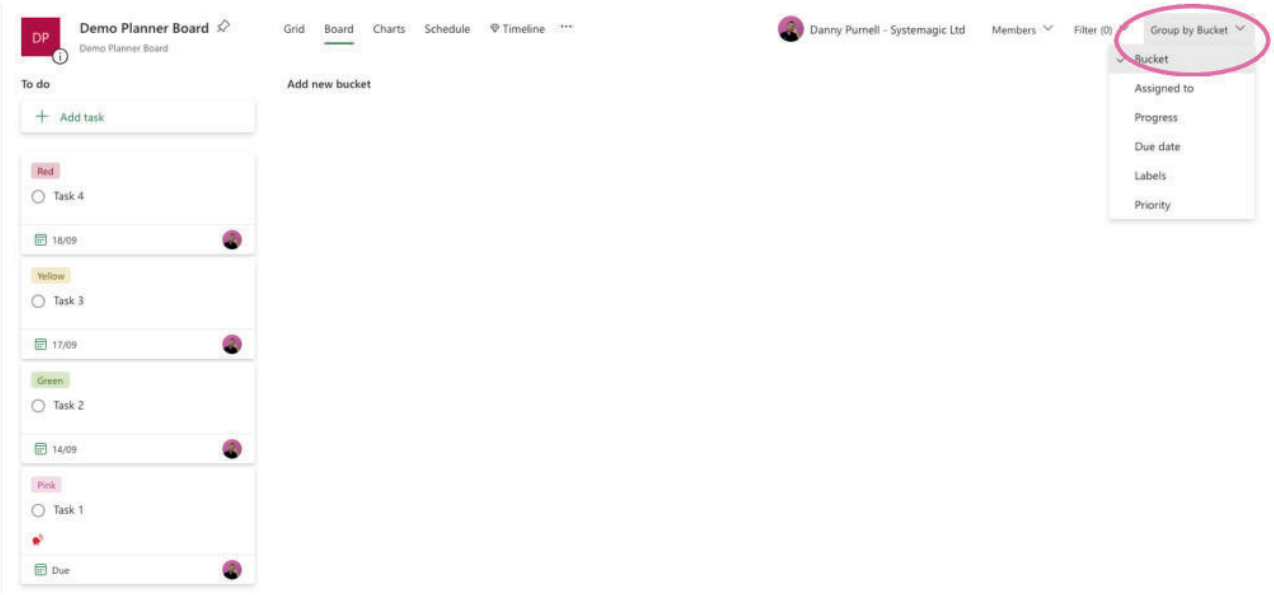






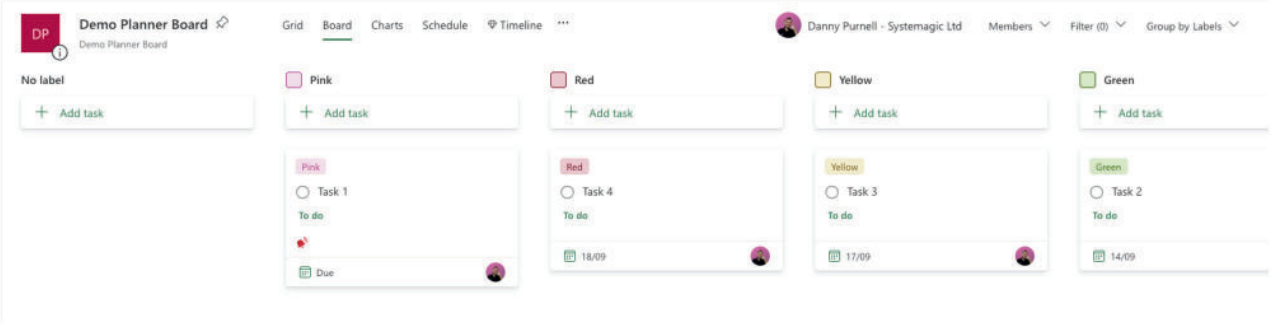
Changing View

With Planner, you can filter your tasks by clicking at the top right of the screen.



Labels

You can filter your tasks by various methods, including labels/categories, due dates, assignees and priority. Below is an example of filtering tasks by categories.



Calendar View

One of the best features of Microsoft Planner is the ability to view your tasks in calendar view.

You can view tasks either in a weekly or monthly format.

