

# Tech Tip

## Team Collaboration with Microsoft Planner

MODERN OFFICE

### What is Microsoft Planner?

Microsoft Planner is an app available in the Microsoft 365 suite designed to track tasks and activities. Planner is accessible on desktop, mobile and web devices.

Planner enables users to organise their tasks at a high level. A plan consists of members, tasks, and buckets.

A task is assigned to one or more people. Tasks can be filtered by due date, priority, label, bucket and assigned people. You can also add files, checklists, and custom labels to each task.

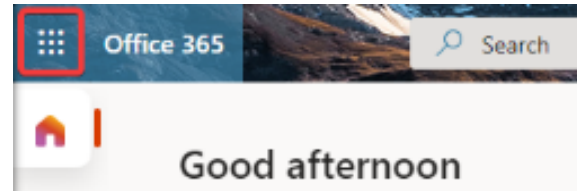
Buckets can be used to group tasks related to a specific topic, workstream or project phase in the overall plan.

Users can choose to view their plan as a list, board, chart, or schedule.

For example, an **Account Management** plan could consist of buckets including Process Stages, Supporting Documents and Organisational Levels, each with relevant tasks.

### Sign into Microsoft Planner

1. Navigate to <http://office.com/signin>.
2. Sign in with your Microsoft work account details.
3. On Microsoft 365 home page, select the app launcher at the top of the browser window.



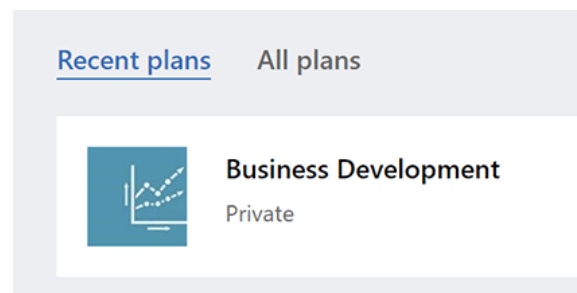
4. Select **Planner**.



**Note:** If you don't see the Planner option, you may need to select **All Apps** or **Explore all your apps** to find it.

### Open an existing plan

If you are already a member of an existing plan, select a plan from the **Favorite plans**, **Recent Plans** or **All plans** section.



### Create a new plan

You can learn how to create a new plan [here](#).

Plans can also be attached to teams, and for more complex projects, Microsoft provides another solution known as Project for the web.

#### About us

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