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Launch Tip of the Month October 2024

Microsoft Planner is a useful tool for scheduling small projects. The filter and highlighting tools help to identify what a specific person is doing.

Below, we have a plan to renovate a home. I have been assigned to work on two of the tasks. I'd like to focus on what I'm doing. To do so, I'll use these two useful tools in Planner.

Note: The highlighting feature does not work in Grid view but does work in Board and Schedule views.

::: Planner					o ? 🥵
=	Renovate 22 Macintosh Str *	Grid Board Charts Schedule		James Storella Me	mbers \checkmark Filter (0) \checkmark Group by Bucket \checkmark
+ New plan	Bathroom	Kitchen	Front Steps	Back Porch	To do
G Hub	+ Add task	+ Add task	+ Add task	+ Add task	+ Add task
Assigned to me					
~ Pinned	 Replace rotted wood 	 Lay down drop cloths 	Hire pros		
Renovate 22 Macintosh Street	Ø	•	Hire a mason		
5 AH	E 10/24 &	Demolition	!		
All	Demolition	 Remove old cabinets 	10/10		
	 Remove bathroom cabinets 	₽ 10/16			
	🗊 Due 🛛 🥌				
	Demolition				
	O Gut bathroom				
	O Boots O Goggles				
	💉 🖉 1 📀 0 / 2				
	🖃 10/22 🔏				

Highlighting

Click the Members drop-down menu and select the name of the person assigned to the task. The list displays the names of all people assigned to tasks.

James Storella	Members $$	Filter (0) 🗡	Group by Bucket ${}^{\checkmark}$
Members			
Enter name to add a member			
James Storella			

Renovate 22 Macintosh Str Renovate 20 Macintosh Street	✤ Grid Board Charts Scheel	dule	James Si	torella Members \checkmark Filter (0) \checkmark Group by Bucket
Sathroom	Kitchen	Front Steps	Back Porch	To do
+ Add task	+ Add task	+ Add task	+ Add task	+ Add task
Replace rotted wood	O Lay down drop cloths	Hire pros		
Ø	•	⊖ Hire a mason		
EE 10/24 💊	Demolition	1.00		
Demolition	O Remove old cabinets	10/10		
Remove bathroom cabinets	III 10/16	ç.		
🗊 Due 😽				
Demolition				
Gut bathroom				
Boots				
() Goggles				
III 10/22				

To remove the highlighting, click on the person's name a second time in the Member's drop-down list.

Filtering

Click the Filter drop-down menu and select the name of the person assigned to the task. The list also includes the ability to filter for tasks without anyone assigned to them.

ر	ames Storella	Members $$	Filter (0) ${}^{\checkmark}$
	Filter	Clear	
_	Filter by keyw		
k	Due (0)		~
	Priority (0)		~
	Progress (0)	\sim	
	Label (0)		~
	Bucket (0)		\sim
	Assignment (0)		^
	O Unassign	ned	
	James St	torella	

The grid now only shows tasks assigned to the chosen person!

Renovate 22 Macintosh Str A Grid Board Charts Schedule ····				
Bathroom	Kitchen	Front Steps	Back Porch	To do
+ Add task	+ Add task	+ Add task	+ Add task	+ Add task
Demolition		Hire pros		
 Remove bathroom cabinets 		O Hire a mason		
		1		
		☐ 10/10		

Want to learn more about advanced Microsoft Planner?

Featured Course: Microsoft Planner: Getting Started with Microsoft Planner

3 Hours

- What is Microsoft Planner
- Accessing Microsoft Planner
- Themes
- Navigation Pane
- New Plan Icon
- Planner Hub
- Assigned to Me
- Creating a Plan
- Renaming a Plan
- Adding Members to a Plan
- Creating Buckets to Organize Tasks
- Reordering Buckets
- Moving Tasks between Buckets
- Adding/Changing Additional Task Information
- Categorizing with a Label
- Creating Checklist Items
- Adding Attachments to a Task
- Viewing Attached Files
- Reordering Tasks
- Changing a Task's Progress
- Copying Tasks
- Assigning Tasks to Members
- Highlighting the Tasks for a Member
- Grouping and Filtering Tasks
- Copying Tasks
- Assigning Tasks to Members
- Highlighting the Tasks for a Member
- Grouping and Filtering Tasks
- Working with Grid, Charts, and Schedule Views
- Plan Settings
- Creating a Link to a Task or Plan
- Accessing the Planner Notebook

- Using Planner in Teams
- Understanding Notification Options
- Adding a Plan to the Outlook Calendar
- Copying a Plan
- Deleting a Plan
- Commenting
- Guest Access

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