

# Planner & To Do

Quick Reference Card — Blue Ant Media

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## What's Changing

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**Google Tasks** is being replaced by **Microsoft Planner** — a single app that handles both personal to-do lists and team project boards. Microsoft merged To Do, Planner, and Project into one unified app, so you get everything in one place.

**For Google Tasks Users:** Google Tasks was a simple checklist. Microsoft Planner gives you that same simplicity for personal tasks (called **To Do**) plus visual team boards for tracking group work — all under one roof.

**MIGRATION WARNING:** Google Tasks do NOT migrate automatically. There is no conversion tool. Your Google Tasks lists will stop being accessible after the Google Workspace cutover. Write down or screenshot your current Google Tasks before migration day and manually recreate them in To Do.

## To Do: Your Personal Tasks

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To Do is the personal side of Planner — manage your own work, day by day.

### Your Task Lists

List	What It Does
<b>My Day</b>	Tasks you choose to focus on today — resets each night
<b>Important</b>	Tasks you have marked with a star
<b>Planned</b>	Tasks with due dates, sorted by when they are due
<b>Assigned to me</b>	Tasks colleagues have assigned to you in Planner boards
<b>Flagged email</b>	Any email you flag in Outlook appears here automatically
<b>Tasks</b>	Your default catch-all list
<b>Custom lists</b>	Create your own (e.g., "Weekly Reports", "Show Launch Prep")

## Creating a Task

1. Open **To Do** (from the Planner app, or the checkmark icon in Outlook's sidebar)
2. Click **+ Add a task**
3. Type your task name and press Enter
4. Click the task to add details: due date, reminder, notes, or steps (sub-tasks)

**TIP:** Flag any email in Outlook and it instantly appears in your To Do list. Right-click an email > **Flag** > choose a due date. You will never forget to follow up.

## Planner: Team Task Boards

Planner is the team side — visual boards for tracking group work. If you have used Trello or a sticky-note wall, you will feel right at home.

### How Boards Work

Element	Description
<b>Buckets</b>	Columns that organize tasks into groups (e.g., "To Do", "In Progress", "Done")
<b>Task cards</b>	Individual tasks with a title, assignee, due date, and priority label
<b>Labels</b>	Color-coded tags (e.g., Urgent, Review Needed, Waiting on External)
<b>Progress tracking</b>	Mark tasks as Not Started, In Progress, or Completed

### Creating a Plan

1. Open **Planner** in Teams (click the Planner icon in the left sidebar) or go to **planner.cloud.microsoft**
2. Click **+ New plan**
3. Give it a name (e.g., "FAST Channel Launch Q3")
4. Add it to a Teams channel if you want the whole team to see it
5. Start adding buckets and tasks

### Assigning Tasks

Click any task card, then click **Assign** to add team members. They will get a notification and the task appears in their "Assigned to me" list in To Do.

## Where to Find It

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Where	How
<b>In Teams</b>	Click the <b>Planner</b> icon in the left sidebar of Teams
<b>On the web</b>	Go to <b>planner.cloud.microsoft</b> in your browser
<b>On your phone</b>	Download the <b>Microsoft Planner</b> app (iOS or Android) — it includes To Do
<b>In Outlook</b>	Click the <b>checkmark icon</b> in the left sidebar to see your To Do tasks

## Common Blue Ant Scenarios

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Department	Use Cases
<b>Production</b>	Track episode delivery milestones — buckets for Pre-Production, Filming, Post, Delivery
<b>Marketing</b>	Launch checklists for new shows — assign social posts, press releases, and creative assets
<b>Content</b>	Review workflows — route rough cuts through Review, Feedback, and Approved buckets
<b>Finance</b>	Month-end close tasks — recurring checklists with due dates and assignees
<b>Creative</b>	Asset request tracking — intake requests as cards, move through Design, Review, Done
<b>HR</b>	Onboarding task boards — new hire checklist with tasks assigned to IT, HR, and the hiring manager

## Planner vs. Other Tools

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Use...	When You Need To...
<b>To Do</b>	Manage your own personal tasks and daily priorities
<b>Planner boards</b>	Track team work visually with assignments and deadlines
<b>Outlook flags</b>	Quick "remind me to follow up" on an email
<b>Teams channels</b>	Discuss and collaborate — but don't track tasks there
<b>SharePoint lists</b>	Track structured data (inventories, logs, directories)
<b>Microsoft Forms</b>	Collect responses from people (surveys, RSVPs)

**F3 License Holders:** You get full access to basic Planner boards and To Do — which covers most daily task management needs. Premium features like timeline view, goals, and portfolio management are available on E3/E5 licenses.

## Tips

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- **Start your day with My Day** — spend 2 minutes each morning picking your focus tasks
- **Flag emails instead of making mental notes** — flagged emails become tasks automatically
- **Use buckets that match your workflow** — “To Do / In Progress / Done” is a classic, but customize to fit your team
- **Don’t over-organize** — a simple board with 3–4 buckets beats a complex one nobody updates
- **Pin Planner in Teams** — right-click the Planner icon and select “Pin” so it is always one click away
- **Set due dates on everything** — tasks without dates tend to get forgotten

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Need help? Contact [m365support@blueantmedia.com](mailto:m365support@blueantmedia.com) or visit the **M365 Help** channel in Microsoft Teams.