

Office 365 Planner



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Intro to Office 365 Planner

Office 365 Planner provides a hub for team members to create plans, organize and assign tasks to different users and to check updates on progress through dashboards. It also provides a centralized place where files can be shared and gives visibility to the whole team.

Microsoft have created a suite of apps that all complement one another and work together. Planner allows users to easily integrate tasks into Outlook, attach and view task documentation by linking to SharePoint, discuss a project within Teams while having your Plan open, open a video call with Teams, (formerly Skype for Business) and more!

In this training session, we will demonstrate how to get started using Office 365 **Planner**. We will walk through the key features and objectives below.

Objectives

At the completion of training, the users will be able to

- Create and maintain new plans
- Tasks creations
- Tasks management

Sign In to Planner

To access Office 365 **Planner** sign in by opening a web browser and going to [Microsoft 365 Account](#). *Google Chrome* or *Mozilla Firefox* are recommended browsers to use.

Click in the first field to enter your Winston-Salem State University account, using the fully qualified username: (See Figure 1) username@wssu.edu.

Note: All logins for all Office 365 products should be entered using the “**username@wssu.edu**” format.

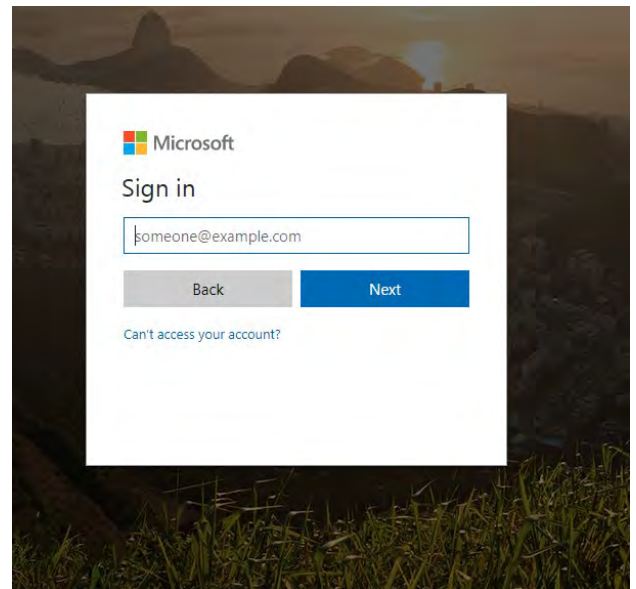


Figure 1 - Microsoft 365 Sign In Username

When users click **Next**, they will be re-directed to the Winston-Salem State University's Office 365 sign-in page. Enter your University password and click **Sign in**. (See Figure 2)

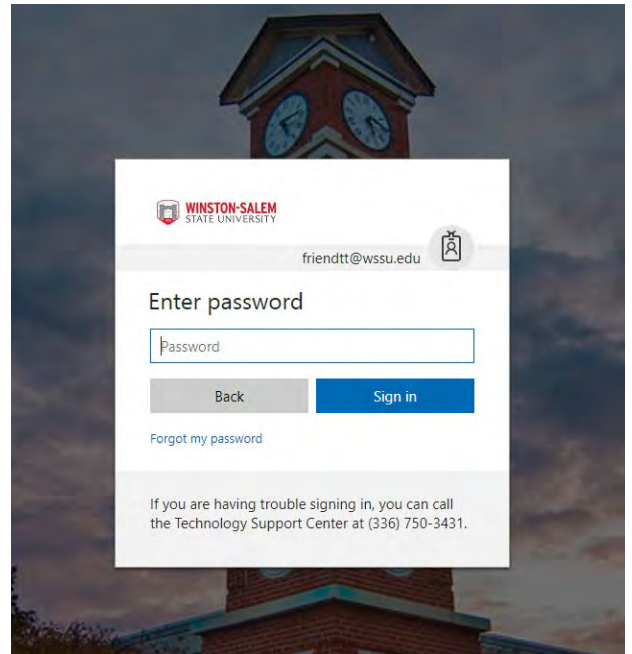


Figure 2 - Microsoft 365 Sign In Password

The Office 365 Interface

Initial login is directed to the main apps landing page. (See Figure 3) From the landing page users can access the following features:

- The **application tiles** for opening the range of available Office 365 apps
- The **Start New**, **All Apps**, and **Install Office** options allow users to maneuver through the landing page.

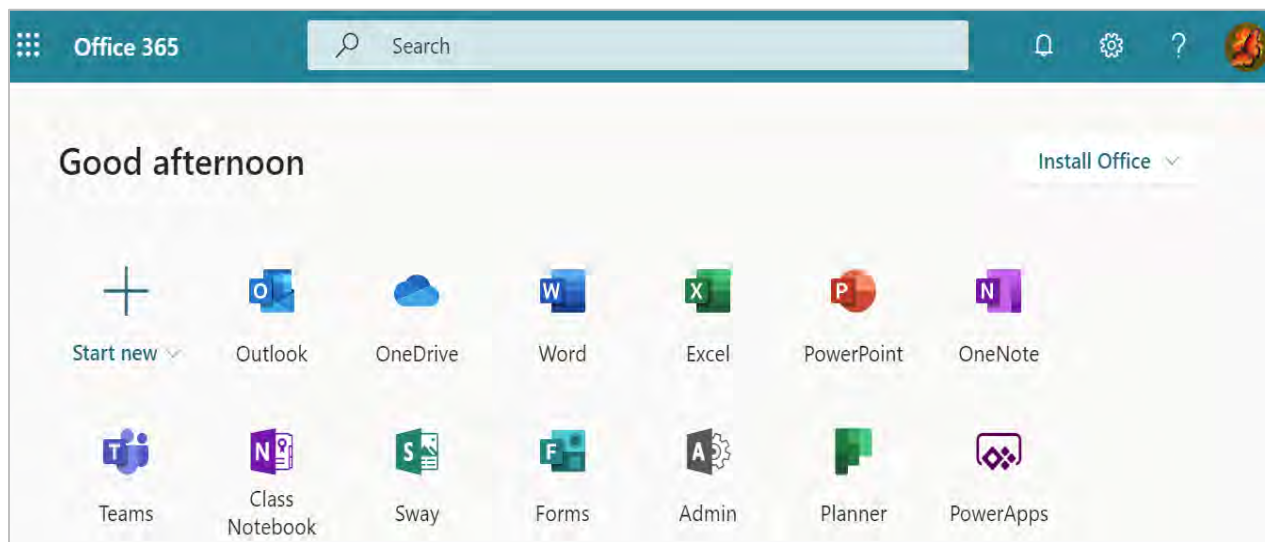
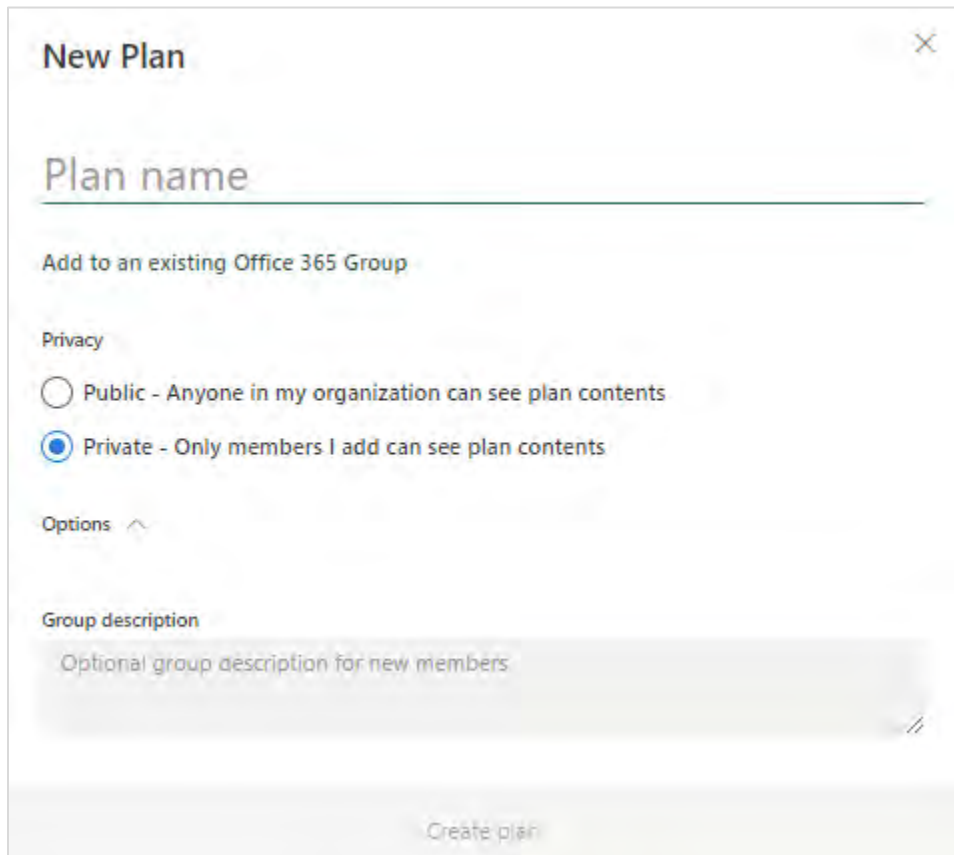


Figure 3 - Microsoft 365 Applications View

Create a New Plan

To start, users can create their first plan. If you have any pre-existing Groups set up, then they will automatically have a plan created against them and will appear on the Planner homepage. If not, you can create a plan quickly by clicking New Plan:



The screenshot shows a 'New Plan' dialog box with a close button (X) in the top right corner. The main input field is labeled 'Plan name'. Below it, there is a section 'Add to an existing Office 365 Group' with a search bar. Under 'Privacy', there are two radio button options: 'Public - Anyone in my organization can see plan contents' and 'Private - Only members I add can see plan contents', with the 'Private' option selected. There is an 'Options' section with a caret icon. Below that is a 'Group description' field with the placeholder text 'Optional group description for new members'. At the bottom, there is a 'Create plan' button.

Figure 4 - Planner New Plan Creation

To get a high level overview of your plans you can go to the 'Planner Hub' which shows a snapshot of how your plans are progressing (once you've added members and created tasks). I really like how visually simple it is yet it shows all the key information easily so you can see what is late, in progress, not started and completed.

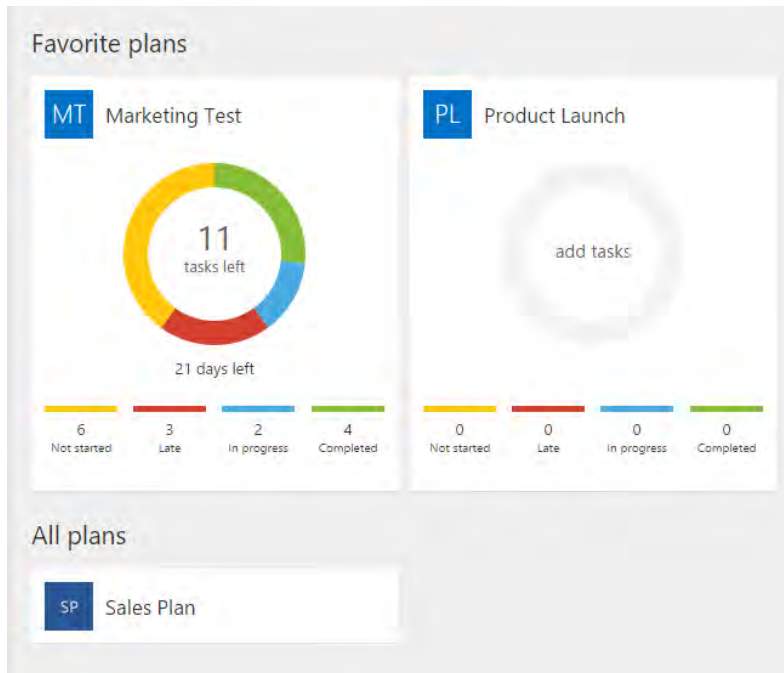


Figure 5 - Planner Hub View

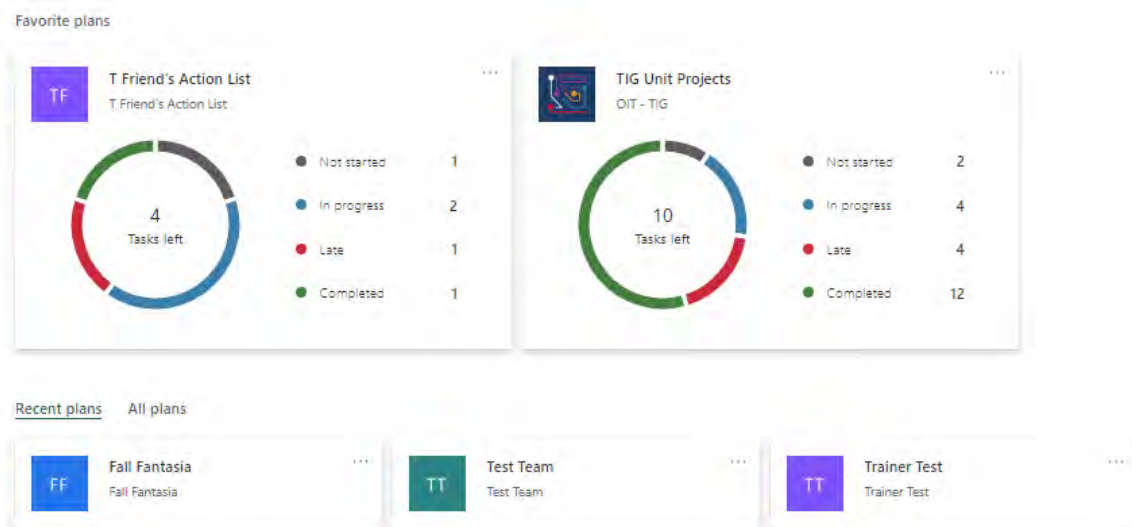


Figure 6 - Planner Favorite Plans View

Tasks

Once you have your plan you can start creating tasks or 'cards', which can be done before or after you add team members. Within your Plan on 'Board' you will see the option to add new task:

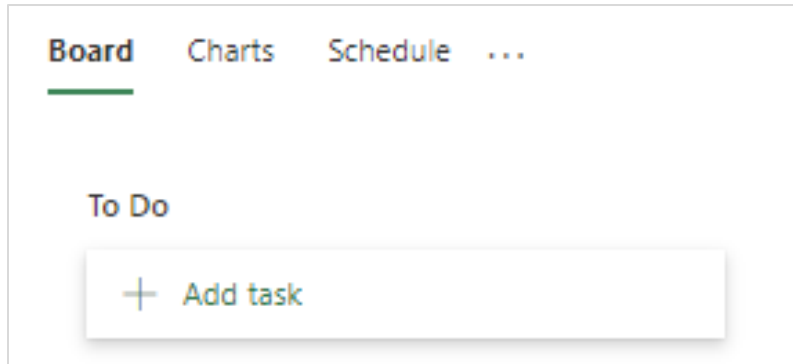


Figure 7- Planner Menu View

Once you've created task – which has very little information – you can click onto it and then add in more detail if required, such as:

- Assigning to members
- Adding start and due dates
- Descriptions
- Attachments (which connect to OneDrive or you can upload a file)
- Links
- Checklists
- Comments

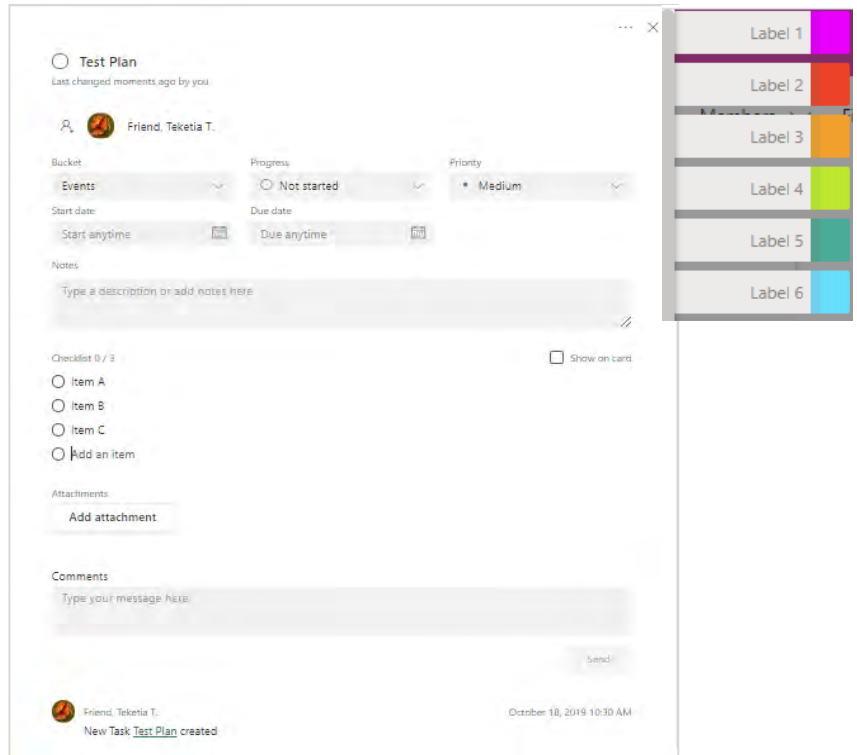


Figure 8 - Planner Label View

There are also little 'post-it' tabs on the side, which you can use to color co-ordinate different tasks. This is how it looks:

You can view your tasks on the Board tab or the Charts tab. The Board tab shows what stage the tasks/ cards are at and gives the detail into each task. If a task is overdue than the date is highlighted in red. If you complete a task you can either tick it (which appears when you hover over the card), or you can simply drag the card from In Progress to Complete, if the board is grouped by progress.

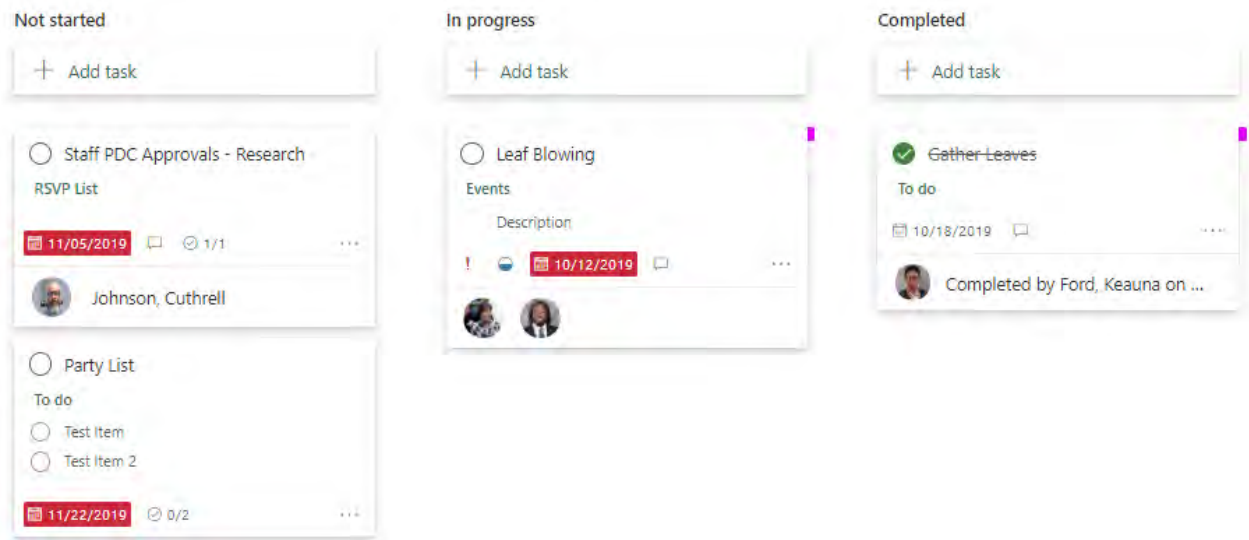


Figure 9 - Planner Task Status View

The Chart view gives a high level overview of the tasks within the Plan. It breaks it down into the status of the tasks; not started, late, in progress and completed and also shows where the tasks are assigned. I think it's a great way of quickly seeing the status of a project and especially if anything is overdue.

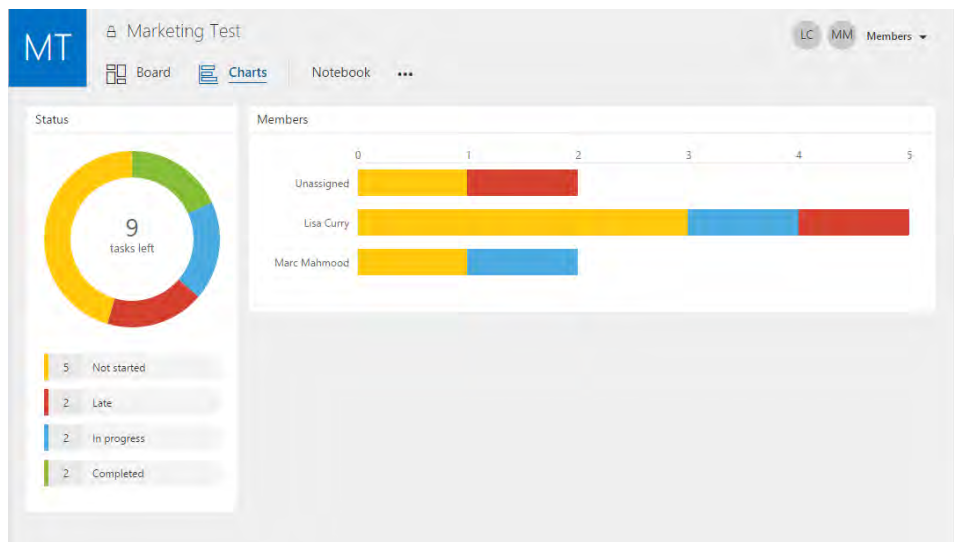


Figure 10 - Planner Task Status Chart View

Along the side navigation you can see you favorite plans and non-favorites and you can also go to 'My Tasks' to just see your tasks for all Plans and the stages they are at.

[What should I do next?](#)

What you do next really depends on what you know about your work, and how you want to stay on top of things. Consider organizing your tasks into buckets and adding the people you'll be working with.

[Add task start and due dates](#)

Start and due dates help give your plan some structure, so that your team knows what needs to happen when. Select a task to get to its details, and then add a **Start date** and a **Due date**.

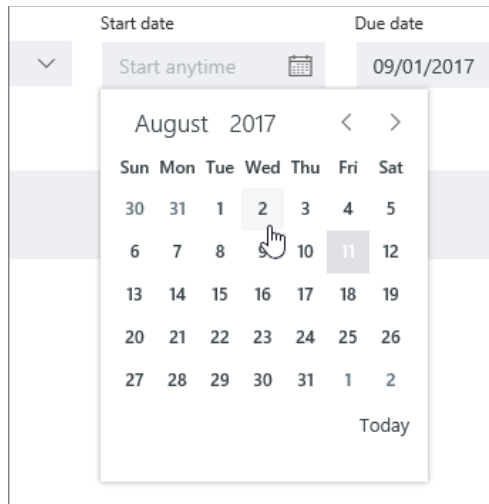
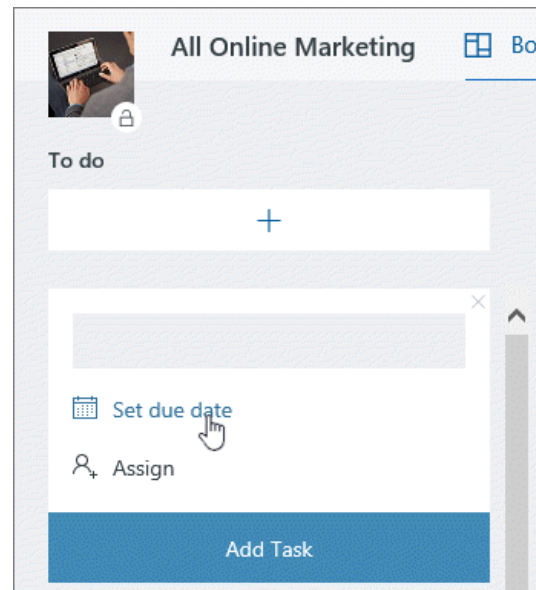


Figure 11 - Planner Set the date fields in task details

You can also add a due date when you create a task. Add name, and then select Set due date to choose a date from calendar.



a task a

Figure 12 - Planner - Set due date

Why is my date red?

Due dates are shown in red if the task is overdue.

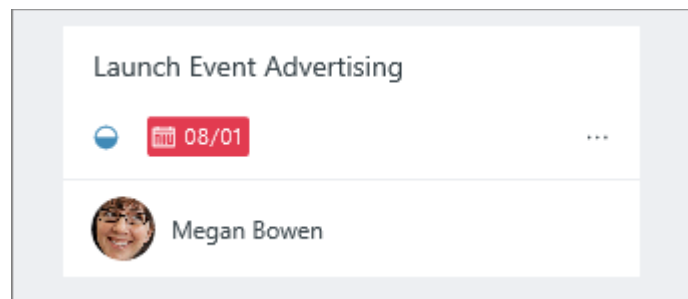



Figure 13 - Planner - Late Tasks Indicator

In this example, the symbol next to the date shows that the task is **In progress**  , but its due date has passed.

Create buckets to sort your tasks

After **adding tasks**, you can sort them into *buckets* to help break things up into phases, types of work, departments, or whatever makes the most sense for your plan.

Set up buckets

To set up buckets for your plan's tasks, on the **Board**, select **Add new bucket**, enter a name for the bucket.

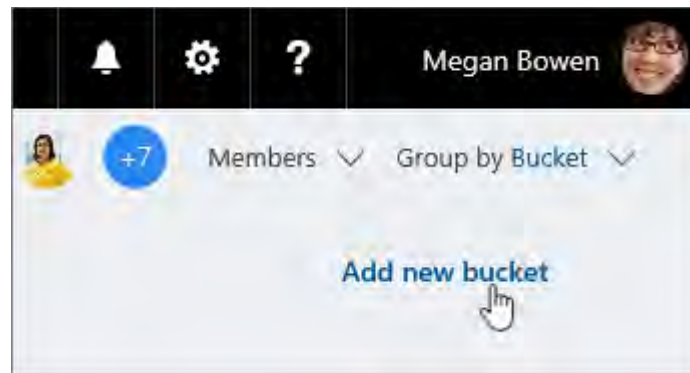


Figure 14 -Planner - New Bucket feature

Don't see Add new bucket? You might have the Board grouped by something else. Select **Group by** near the top right, and choose **Buckets**.

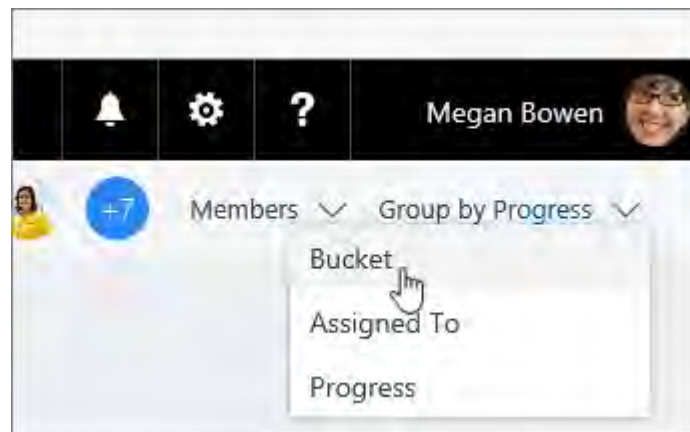


Figure 15 -Planner Group by Bucket

Tip: Want to change a bucket name? Select a bucket name to make changes. You can even rename the **To Do** bucket to something that you might find more useful!

Move tasks into buckets

Once you've created a bucket, you can **drag tasks into the bucket** to start getting organized.

You can also select the plus sign (+) below the bucket name to add a new task to that bucket. Enter the name of the task and choose **Add task**.

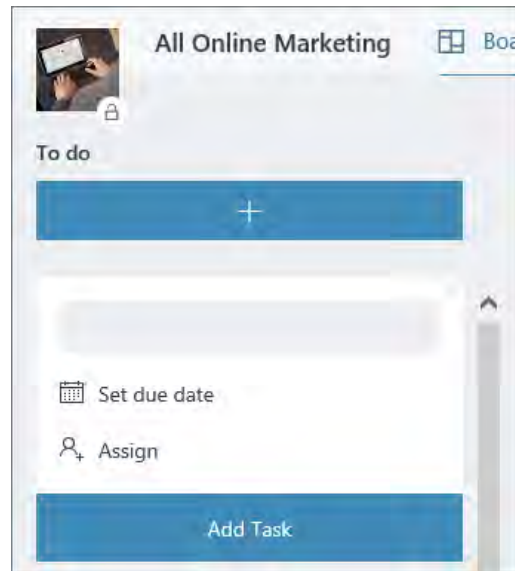


Figure 16 - Planner Adding additional Tasks

More ways to get organized

You can change the order of how buckets appear on the screen by dragging the title of a bucket to a new position. If you need more ways to organize your work, you might find using colored *labels* helpful.

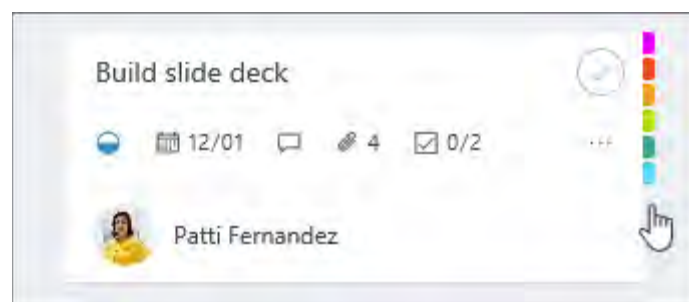


Figure 17 - Planner Using Labels

You can flag tasks with multiple colored labels to help you see, at a glance, which tasks have certain things in common.

Add people to your plan

In Planner, select **Members**, and then enter the name of the person you want to add. Each member will receive an email notification that they've been added to your plan.

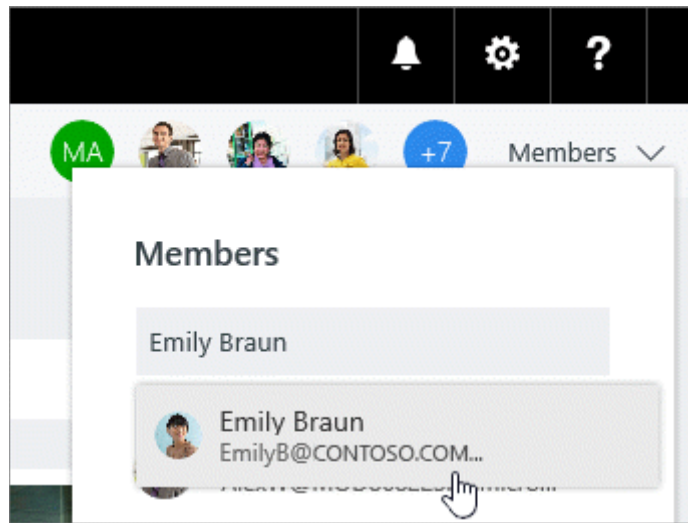


Figure 18 -Planner Adding members to Plan

Note: Want to add people outside of your organization? See [Guest access in Microsoft Planner](#).

After you've added people to your plan, you can [assign them to tasks](#).

Remove someone from Plan?

If you no longer need someone on your plan, select the arrow next to the plan members, point to the person you're removing, select the three dots, and then choose **Remove**.

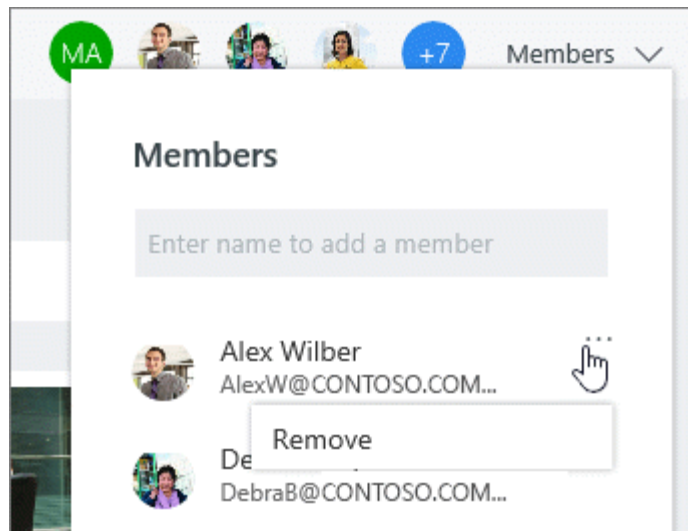


Figure 19 -Planner Remove members from Task

Important: You can't remove the plan's only owner. You need to create a second owner first. See the next section in this article for information on how to create a new owner.

Need to make someone else an owner of a plan?

The person who creates the plan is the plan's owner. Every person who gets added to the plan from Planner is a member. If you want to make another person the owner, you need to edit membership from within Groups in Outlook.

1. From Outlook, find the Group that has the same name as your plan.
2. In the header, select **Group settings > Edit group**.
3. In the **Members** list, click **Make owner** for the person you want to be an owner.
4. While you're here, you can also **Remove owner status**, add member, and remove members.
5. Click **OK**.

Assign people to tasks

When you're ready to decide who's doing what, there are several ways you can assign tasks to people in Planner.

You can assign someone when you create a task. Add a task name, and then select **Assign** to choose a plan member from the list. If the right person isn't listed, type a name or email address in the search box to add someone new.

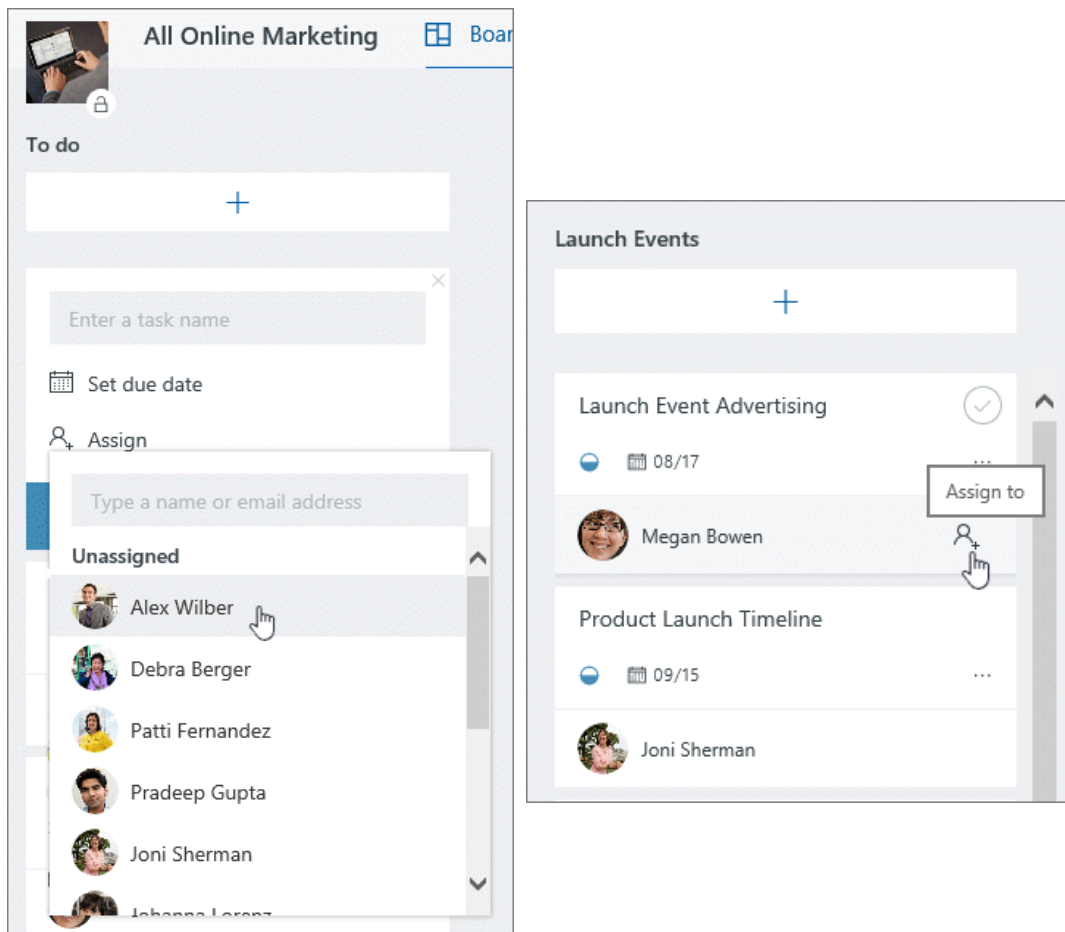


Figure 20 - Planner - Assign other to Tasks

You can assign a task to more than one person. When a task is being worked on by more than one team member, you can assign it to up to 11 people so that they can all see it in their **My tasks** list. When any team member marks the task complete, it's marked complete for all team members.

Change assignments

You can also change the **Board** to be grouped by **Assigned to**, and then drag tasks between the columns for each person on your team.

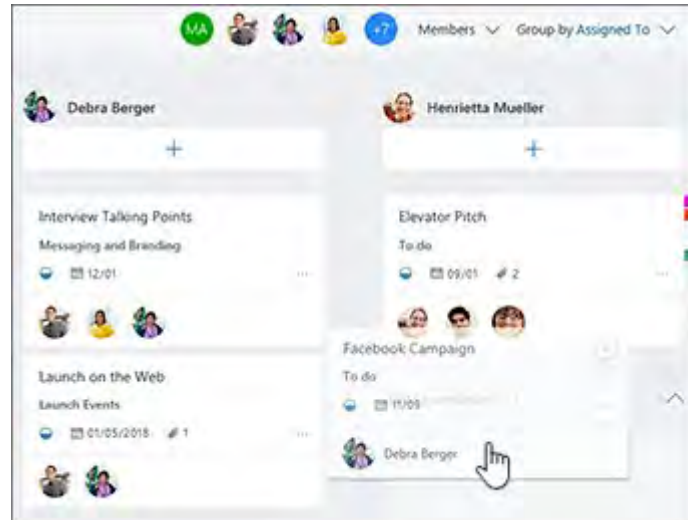


Figure 21 -Planner Board Assignments

Need to remove someone?

If you no longer need someone on your plan, select the arrow next to the plan members, point to the person you're removing, select the three dots, and then choose **Remove**.

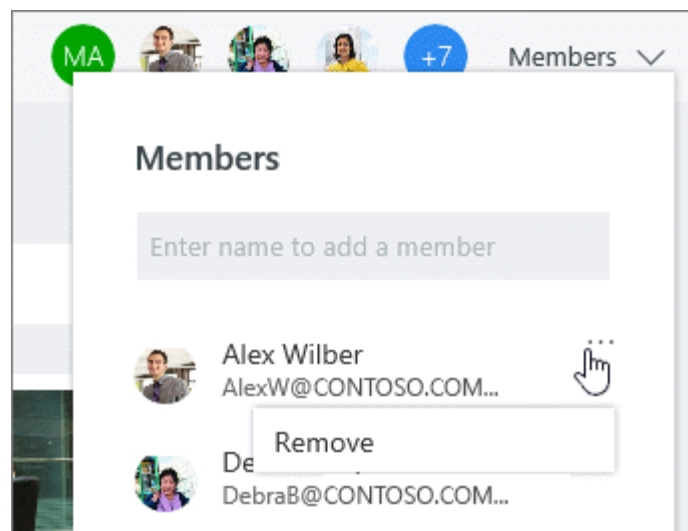


Figure 22 - Planner Board Assignment Removal

Can a group have more than one plan?

You can create multiple plans for a group via Planner integration within [Microsoft Teams](#) and SharePoint. We will support creating multiple plans from the Planner web app in the near future. In addition to creating multiple plans per group, you can also consider using [tasks](#) and [checklists](#) together to plan different work streams, or set up [buckets](#) to split up the work.

Add a checklist to a task

As you start planning your work, there may be lists of things you need to keep track of for each task. You can add a checklist to a task to help you stay on top of your to-do list.

To add a checklist, select the task to bring up its details, and then click **Add an item** under **Checklist**, and then start typing your list. Press **Enter** to add another item to the list.

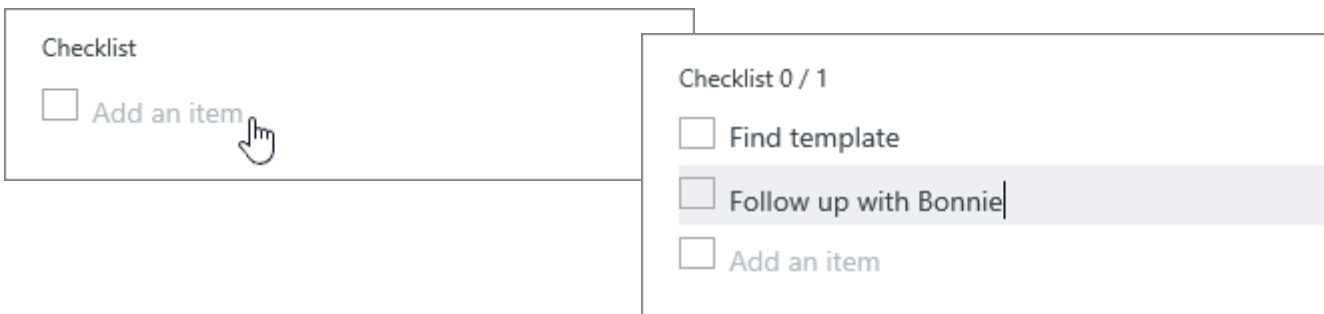


Figure 23 - Planner Adding a Checklist

Set the checklist as the task preview to make it easy to see what work is involved in a task. You can use either a checklist or a document/image preview, but not both. [What else can I use for a task preview?](#)

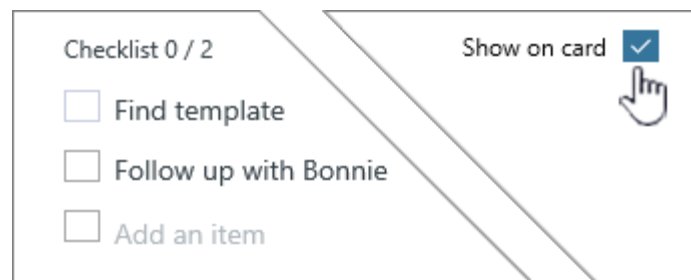


Figure 24 - Planner Show on Card

Mark things completed from the **Board** view by checking them off as you go. [What are some other ways to update task progress?](#)

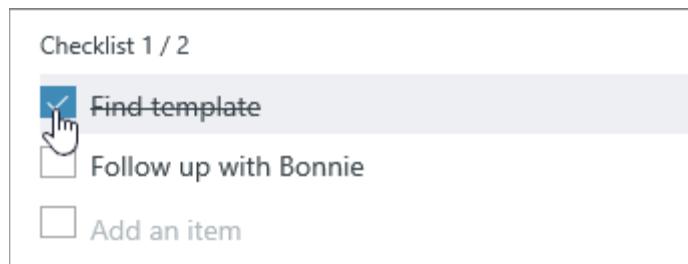


Figure 25 - Planner Checklist

Turn a checklist item into a task

If a checklist item starts to get more complicated, you can turn it into a separate task in your plan.

Select the task to bring up its details, point to a checklist item, and then choose **Promote item**.

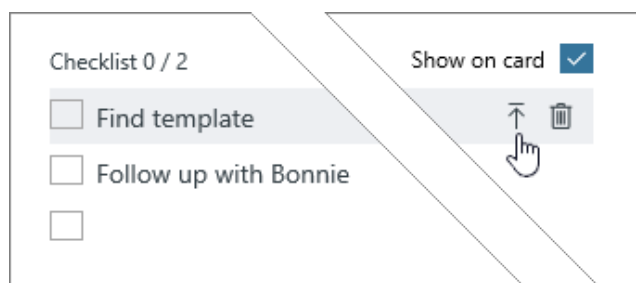


Figure 26 - Planner Checklist Promotion

Delete a checklist item

Don't need a checklist item anymore? Select the task to bring up its details, point to a checklist item, and then choose **Remove checklist item**.

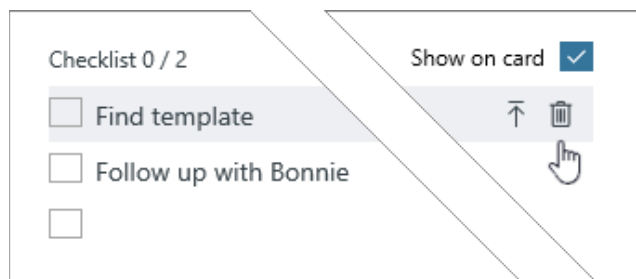


Figure 27 - Planner Checkbox Deletion

Attach files, photos, or links to a task

In Planner, you can attach files, photos, and links directly to the tasks themselves, making the plan a central location for everyone to collaborate and get work done.

To see a list of all files or photos that you've attached to Planner tasks, select the three dots to the right of the plan name (...), and then choose **Files**. These files are stored in the SharePoint document library associated with your plan's Office 365 Group.

Note: If you've just created your plan, Planner may still be setting up your plan's SharePoint document library. If you see a message about this, you'll need to wait a bit before attaching files.

Add an attachment

To attach a file or link, select the task to bring up its details, click **Add attachment**, and then choose **File**, **Link**, or **SharePoint**.

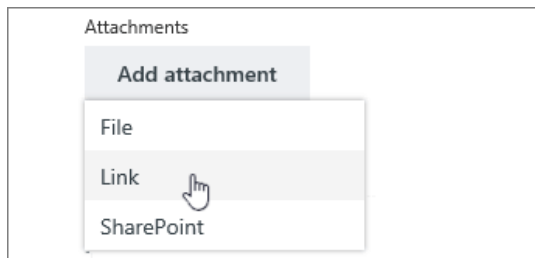


Figure 28 - Planner Upload an attachment

- **File:** Upload a document or file from your local computer. Files you upload are stored in the SharePoint document library associated with your plan.
- **Link:** Fill in a URL and the text you'd like displayed in Planner.
- **SharePoint:** Choose files already stored in the SharePoint document library associated with your plan.

The first time you attach a photo, it will automatically become the task's **preview picture**. If you'd prefer a document as the **preview picture** for the task, click **Show on card** for the document. The **preview picture** is shown on the **Board**, and offers a quick way to identify the task and get to work.

Features You Should Be Using in Microsoft Planner

Bid adieu to teamwork chaos with Microsoft Planner. A solution that comes with your Office 365 suite, the platform enables your team to easily create new plans, assign tasks, share files, update statuses and much more. No matter how big or small the project with Planner teams can effortlessly work together, collaborate on different tasks and produce excellent results.

Without further ado, let us talk about the 6 killer features you should be using in Microsoft Planner to:

- Gain greater visibility into project schedules,
- Receive notifications of upcoming deadlines,
- Easily group and filter tasks

Here is an overview of the features.

Assigning tasks to multiple people

Previously a task can only be assigned to a single person in the plan. Now you can assign a task to as many people as you like. As more than one user can be assigned to a task, every user that is assigned the task will see it on their **My Tasks** page.

Group and Filter options

Get deeper insights into your tasks to help you meet key deadlines with the Group and Filter options in Planner. For e.g you can filter tasks based on due dates to get a clear picture of approaching deadlines and plan your work accordingly.

Due date notifications

Stay on top of your approaching deadlines with this feature. A planner user will receive an email notification with a brief summary of tasks due in the coming week.