Guide to Microsoft Planner

This guide to Microsoft Planner explains how to create plans, manage tasks, and track task progression. The guide will also show you how to integrate Planner with Teams, Excel and mobile devices.

Microsoft Planner is a simple, visual work management tool for structuring, planning and monitoring work for a group of people.

- Create new plans, assign tasks, and share files with others.
- Organize teamwork and collaborate on projects in a simple, visual way.
- Chat with others to make sure you're on the same page.
- Keep track of your team's progress and stay on top of your work—from anywhere, on any device.

How to access Microsoft Planner?

To access Microsoft Planner, go to https://www.office.com/ and login using your Open University email address and password.

Once logged in, you will see the App menu displayed down the left hand side of the page, Microsoft Planner is not listed from the initial menu, click the **'All Apps'** button (see Fig. 1) and you'll find the Planner app on the Office 365 apps page (see Fig. 2).

Fig. 1: All Apps menu.

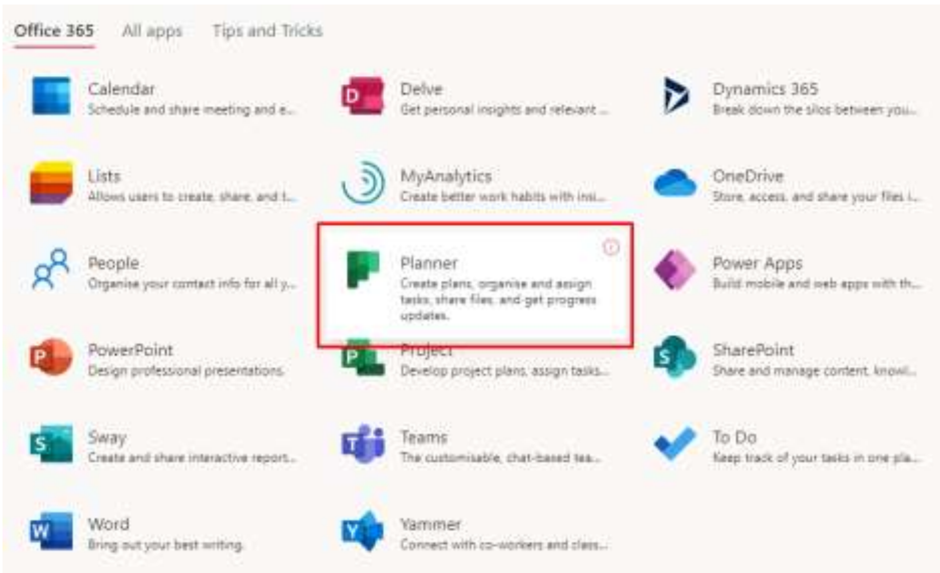

Fig. 2: Office 365 Apps.

When Planner opens the default screen is the Planner hub, which displays on overview of your plans and tasks, it also the starting place to create new plans. (see Fig. 3)

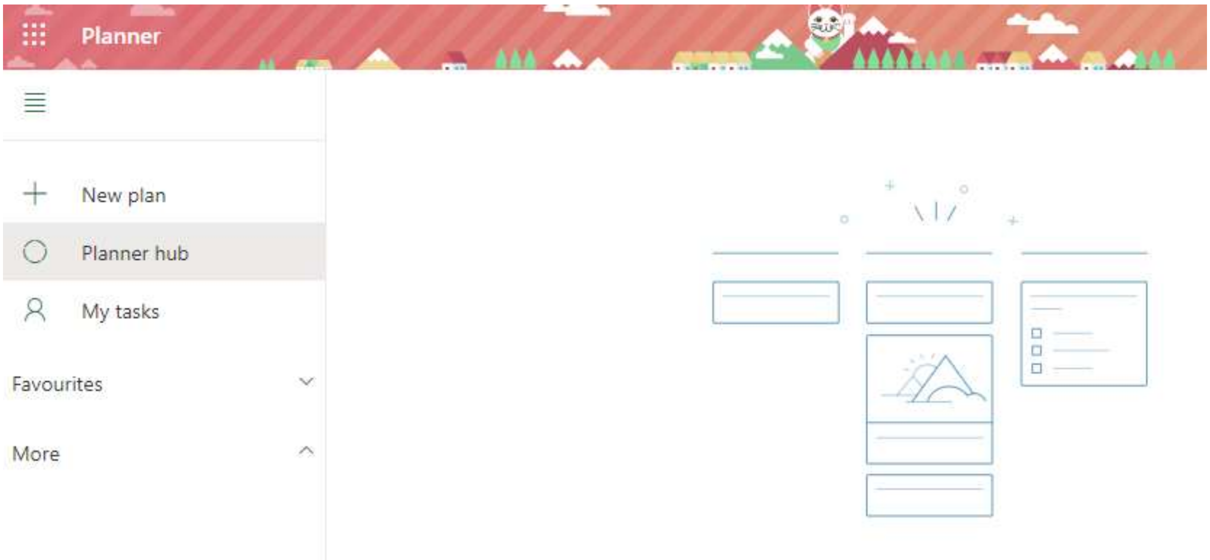

Fig. 3: Planner hub.

How to use Planner – Build your plan

Create a new plan

1. Select '**New plan'** in the left pane. (see Fig. 3)
2. In the New plan window:
   - Type a name for the plan.
   - Choose your plan privacy option:
     - Public – Select the public option if you want it to be visible to the rest of the university and in search results.
     - Private – Select the private option if you want only plan members to see it.
   - Choose a classification: Highly restricted, Highly confidential, Proprietary, Internal use only, Public.
   - To enter a unique description for the plan, select **'Options'** and type your description.
   - Click **'Create plan'** (see Fig. 4)

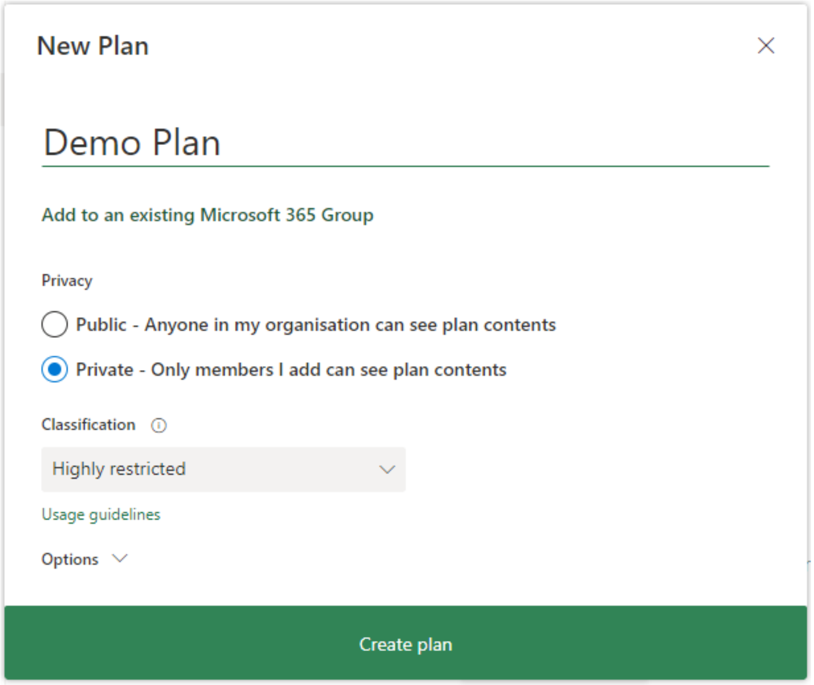

Fig. 4: New Plan window.

Once the plan has been created, it is displayed on the Board screen. The board offers a flexible way to organize your team's work, and makes it easy for you to see who's doing what and view details about any task. The board screen can be switched via the Plan menu to a Charts screen, a Schedule screen and other screens via the **'. . .'** options button (see Fig. 5).

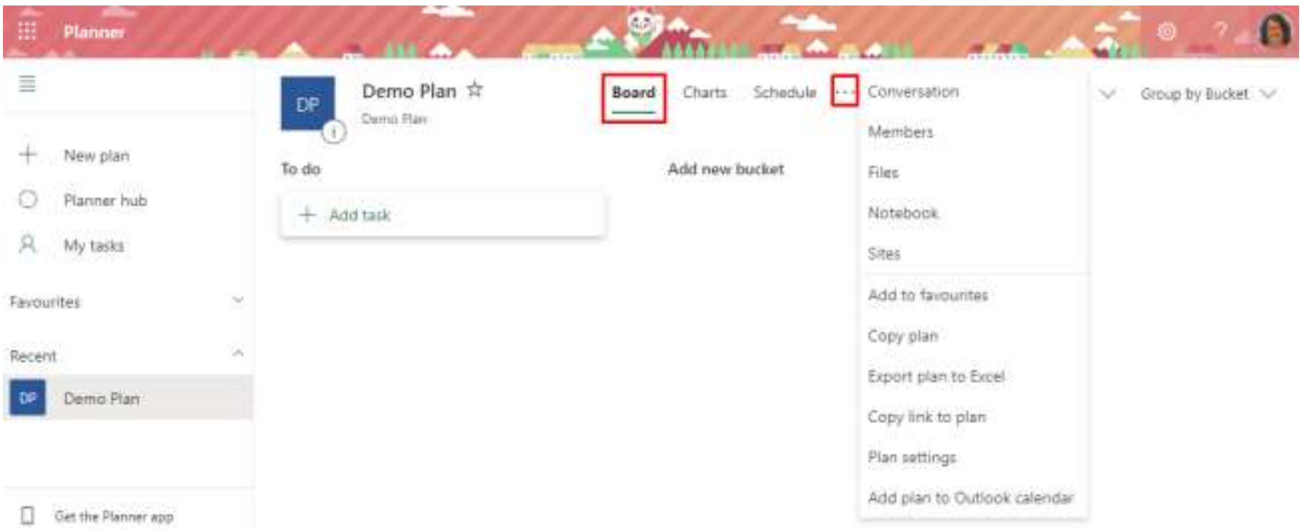

Fig. 5: Display of a new Plan.

Add people to a plan

The next task is to assign team members to the plan.

1. Select '**Members'** in the upper-right corner of the Planner window.
2. Begin typing the name or email address of a person within your organization that you want to add to the plan.

3. Select the person's card when it appears (see Fig. 6). After you add people and tasks to your plan, you can assign people to tasks.

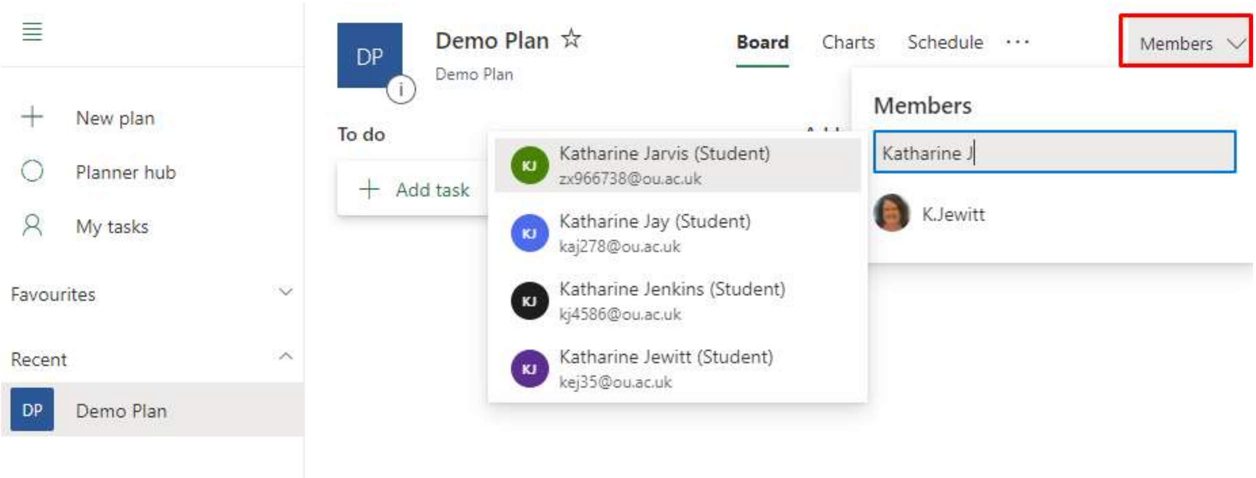

Fig. 6: Add new members to your plan

Set up buckets for tasks

Buckets are used to organise tasks into things like workstreams, project phases, or topics. By default, a bucket named ‘To do’ is created to store your tasks. To rename the bucket, click the more options button **‘. . .’** and choose the rename option from the list, (see Fig. 7).

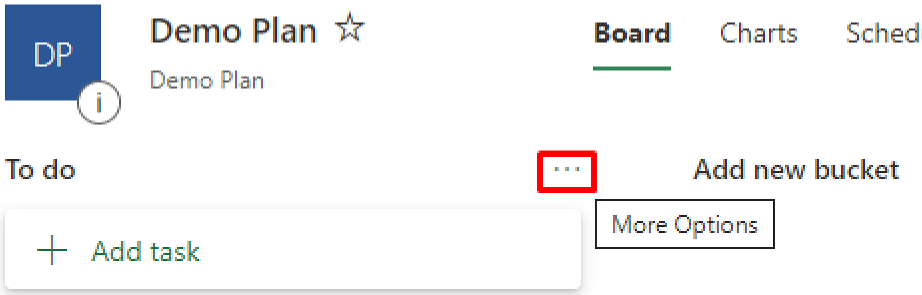

Fig. 7: Bucket options button.

Creating additional buckets

To add additional buckets, perform the following steps.

1. Select ‘**Add new bucket’** to the right of any existing buckets.
2. Type a name for the bucket, and then press Enter.

Tip: If you don't see ‘**Add new bucket’** button, the Plan board might be grouped by something else. To change the task grouping on the plan board, perform the following steps (see Fig. 8).

1. Select ‘**Group by’** near the upper-right corner of the plan board.
2. Select ‘**Bucket’**.

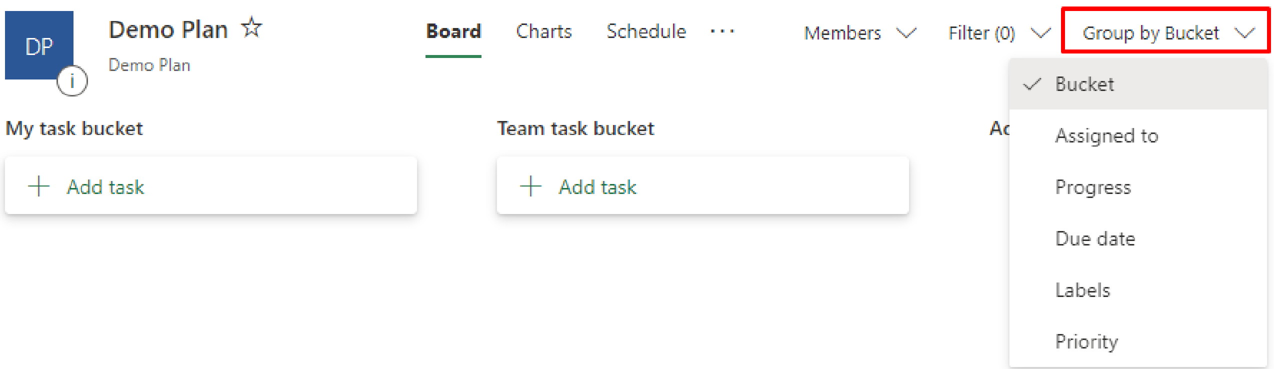

Fig. 8: Board grouping options.

Add tasks to a plan

To add a task to the plan perform the following steps:

1. Select '**+ Add task'** below the heading of the bucket to which you want to add a task (see Fig. 9).
2. Select '**Enter a task name'**.
3. Type the task name.
4. Do either of the following:
    - Press Enter to create a task without a due date or an assigned person.
    - Select '**Set due date'** and select a date.
    - Select **'Assign'** to add a person to the task.
    - Then select '**Add Task'** to create the task.

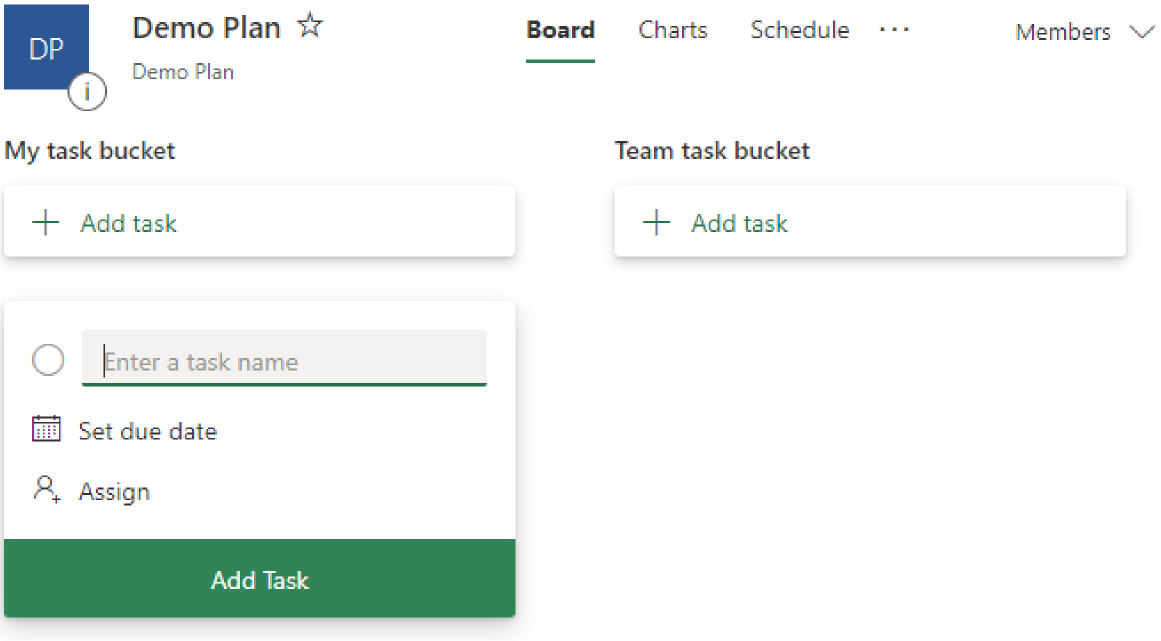

Fig. 9: Adding a task to a Plan

Modify task

Select the task to open the task window. From the task window (see Fig. 10) you can change the task name, assigned people, Bucket, Progress, Start and Due dates. You can also add Notes, Checklists, Attachments and Comments.

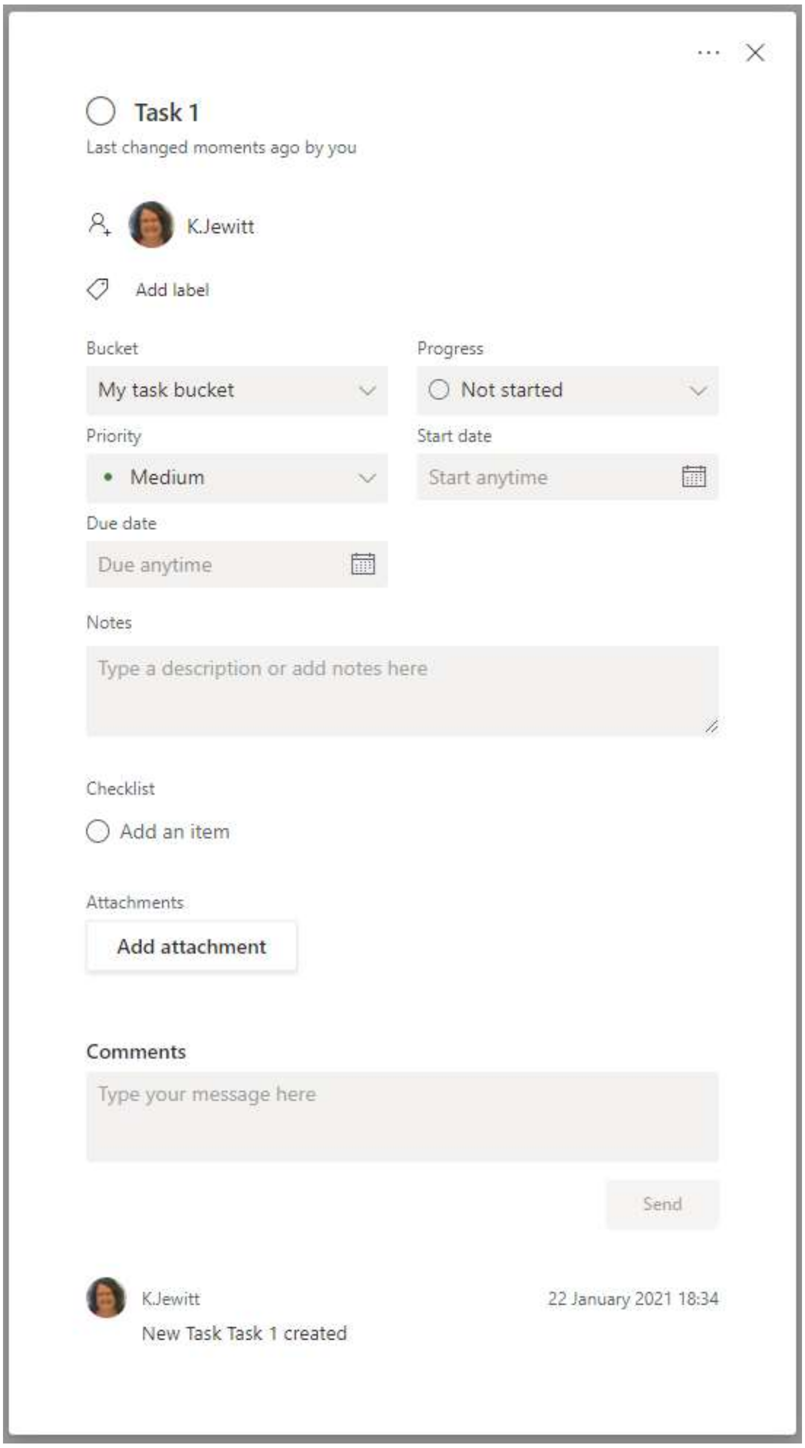

Fig. 10: Task window.

Select dismiss ✕ in the upper-right corner of the task window to save and close the task.

Task preview

In Planner, each task on the Board can have a preview, offering a quick way to identify the task. For example, you could use an Office file, PDF, photo, checklist, or description text, just check the **'Show on card'** option, (see Fig. 11 and Fig. 12).

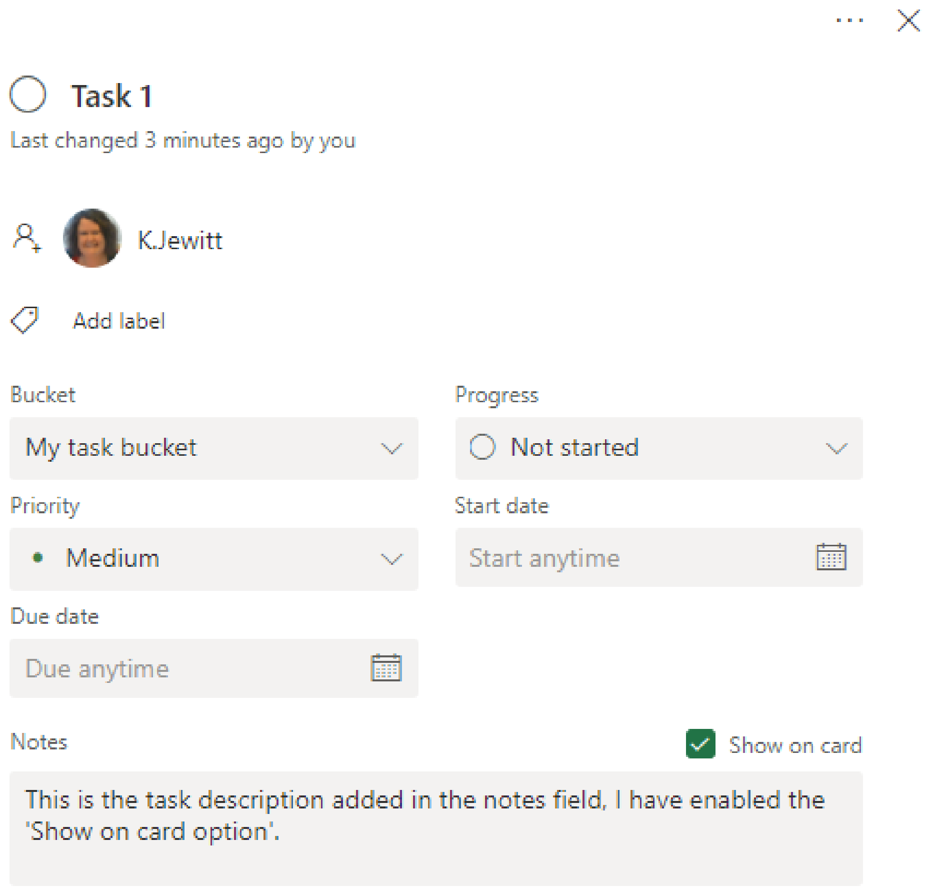

Fig. 11: Task description with 'Show on card' checked.

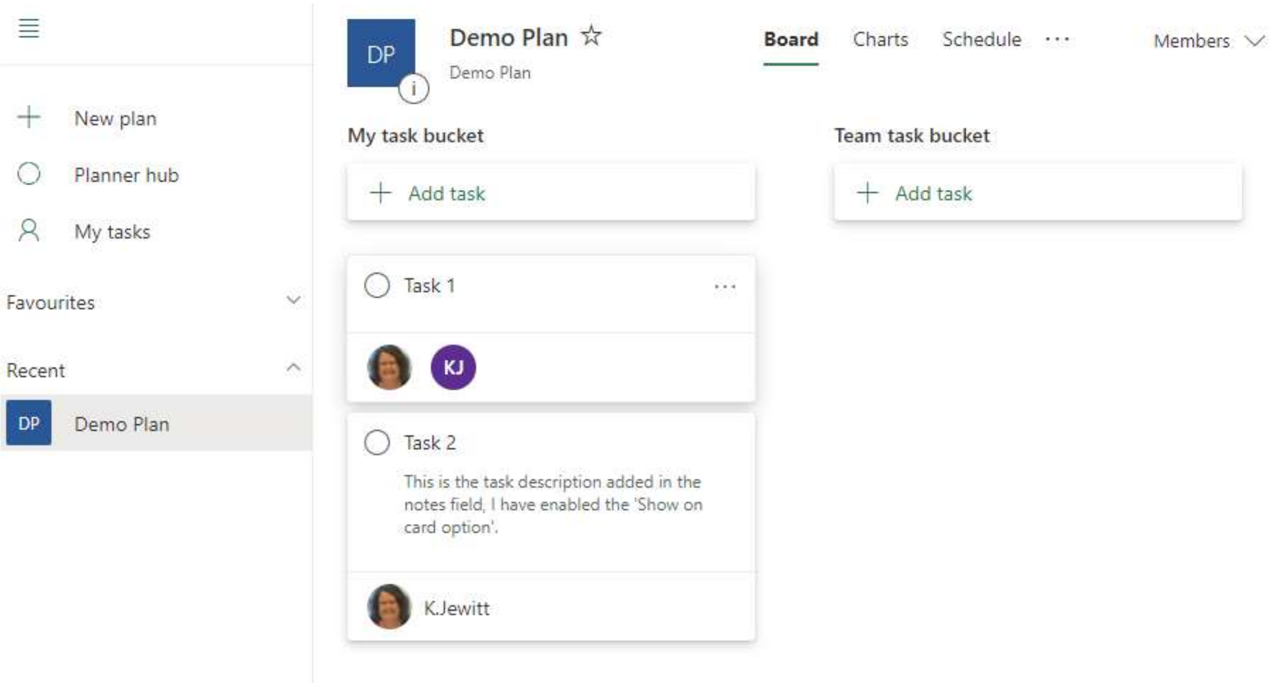

Fig. 12: Board showing two tasks. Notes for Task 2 are previewed.

How to use Planner – Stay on track

Set and update task progress

To update the progress of a task, open the task and change the status from **'Not started**', to **'In progress'** or **'Completed'** (see Fig.13).

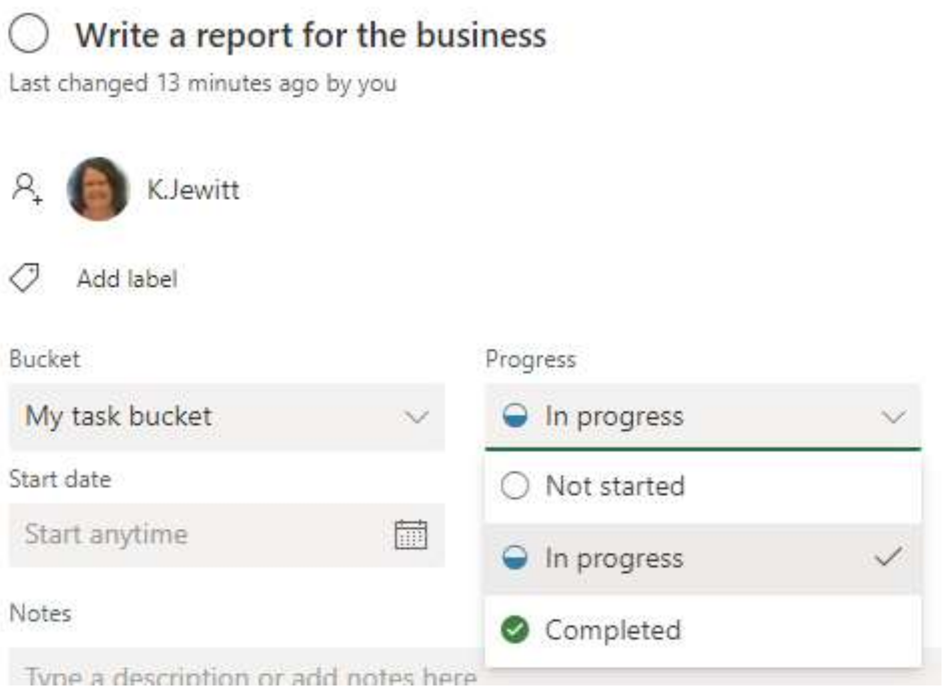

Fig. 13: Changing the Progress of a task.

Task Priority

Priorities can also be set on tasks, the default priority for a new task is Medium, however this can be changed to Low, Important or Urgent (see Fig. 14).

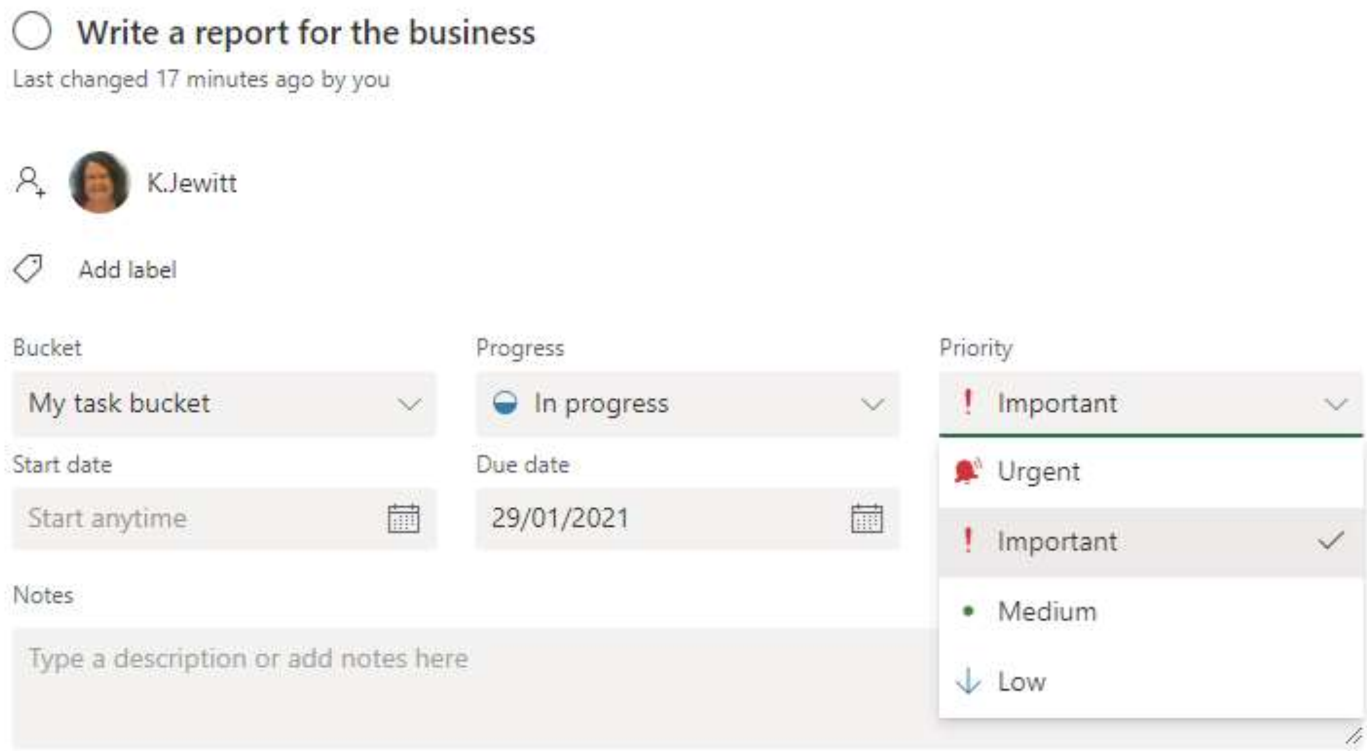

Fig. 14: Priority options for tasks.

Task Checklists

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:

1. Select the task to bring up its details
2. Click **'Add an item'** under Checklist
3. Typing your checklist item.
4. Press Enter to add another item to the list.

To mark items on the check list as complete, tick the box to the left of the checklist item, a progress bar also appears above the check list. Checklist items can also be promoted to a new task. Hovering over the checklist item displays a **'Make this a new task'** button (see Fig. 15).

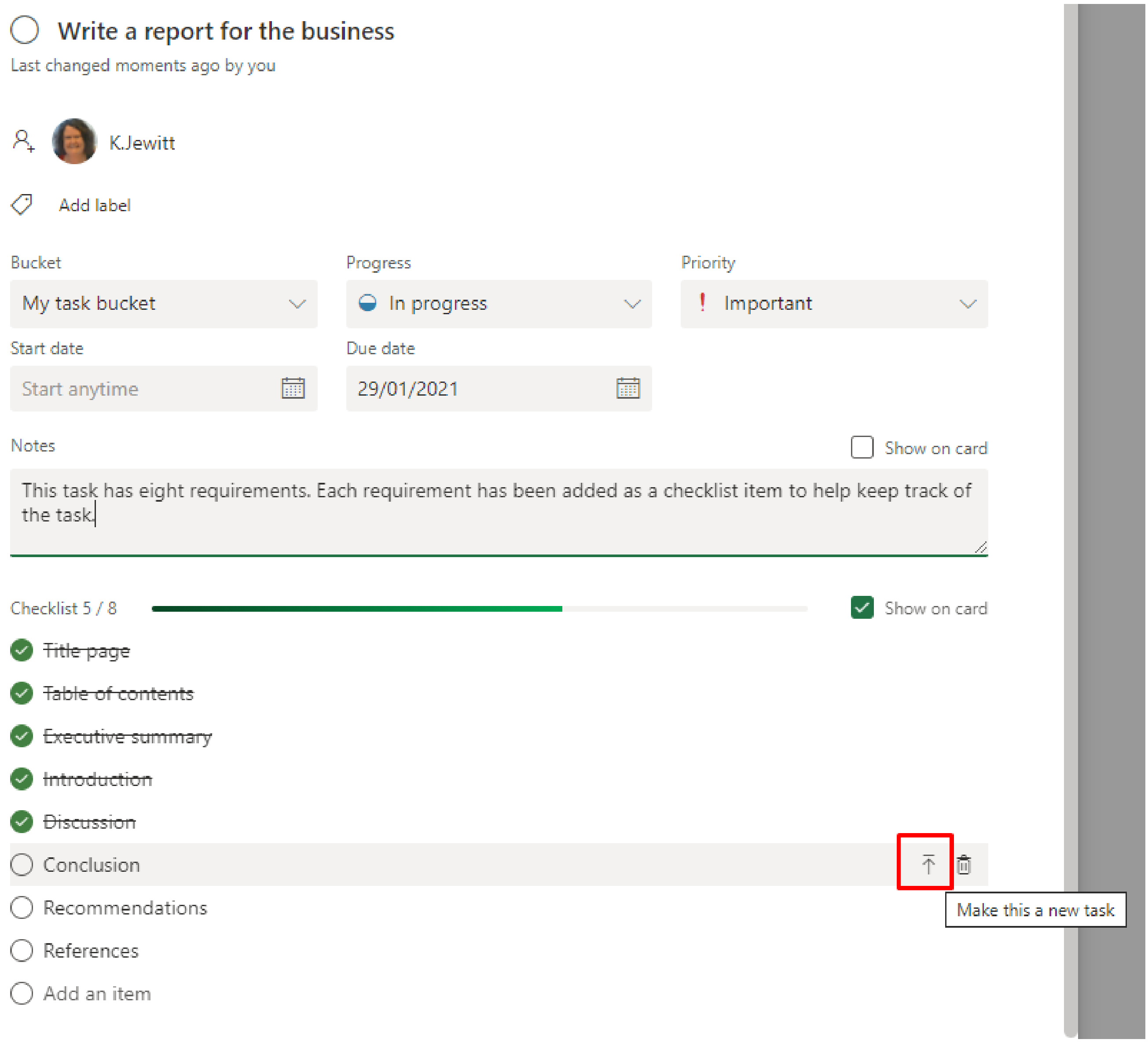

Fig. 15: Checklist item displaying the 'Make this a new task button'.

Checklist item progress can also be displayed on the task preview. The preview displays the next three items on the checklist which are not complete, it also displays the checklist completion progress (see Fig. 16).

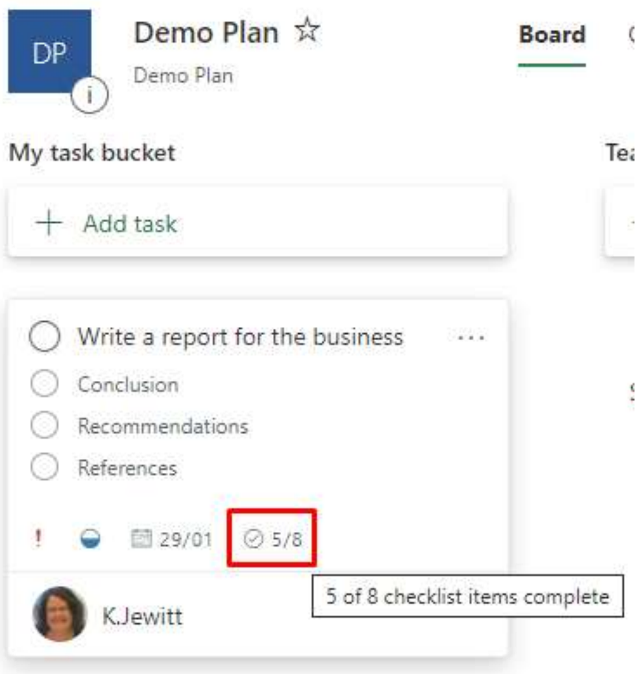

Fig. 16: Task showing a checklist progress in the task

Charts

The Charts screen shows how your plan is progressing, with details about what's complete, in progress, not started, and late. Task status is displayed by Status, Bucket, Priority and Members (see Fig. 17).

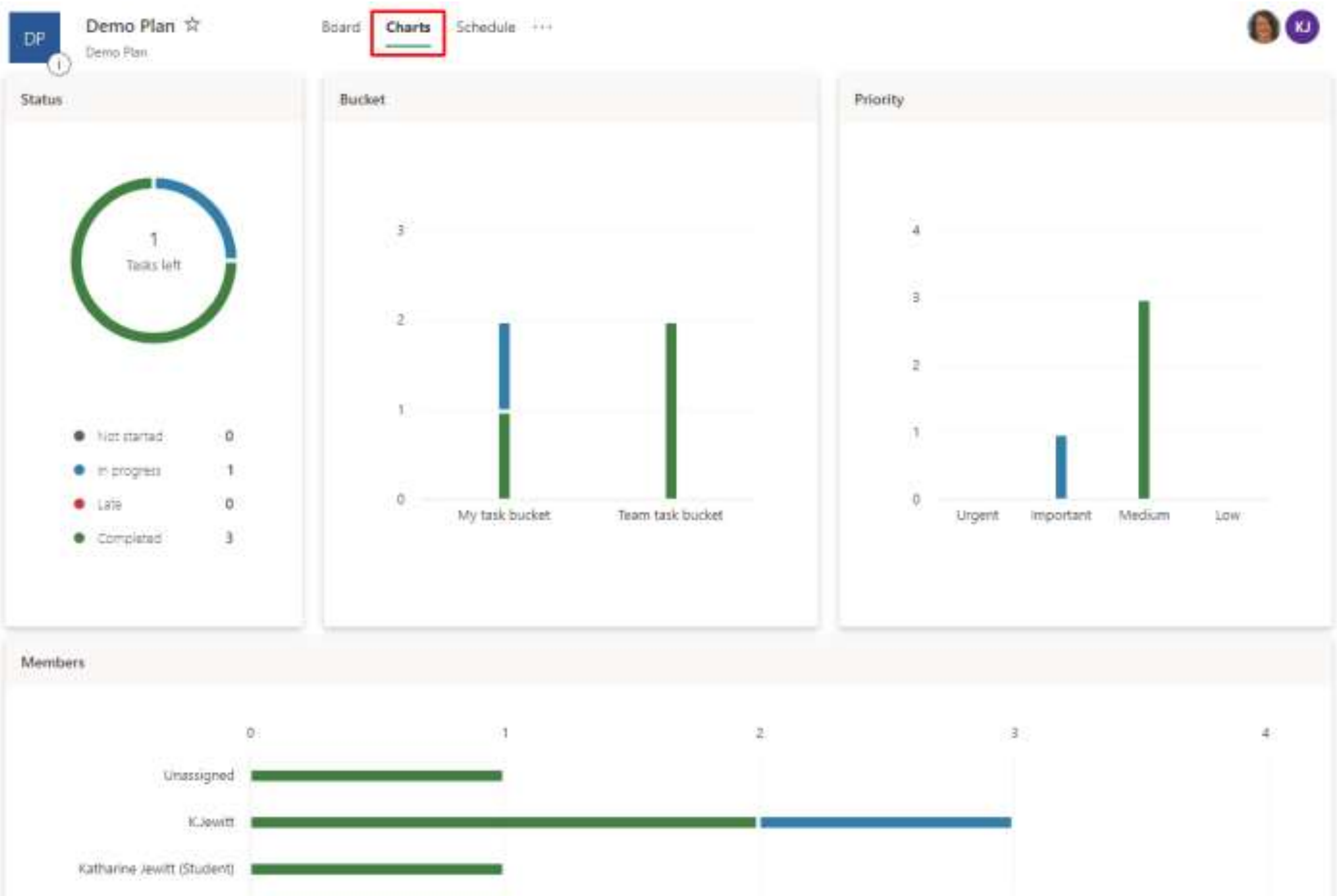

Fig. 17: Charts screen displaying task status from the plan.

Schedule

The schedule screen displays task for a plan in either a weekly or monthly view (see Fig. 19). Tasks can be moved to different days by simply dragging it on to another date in the calendar view.

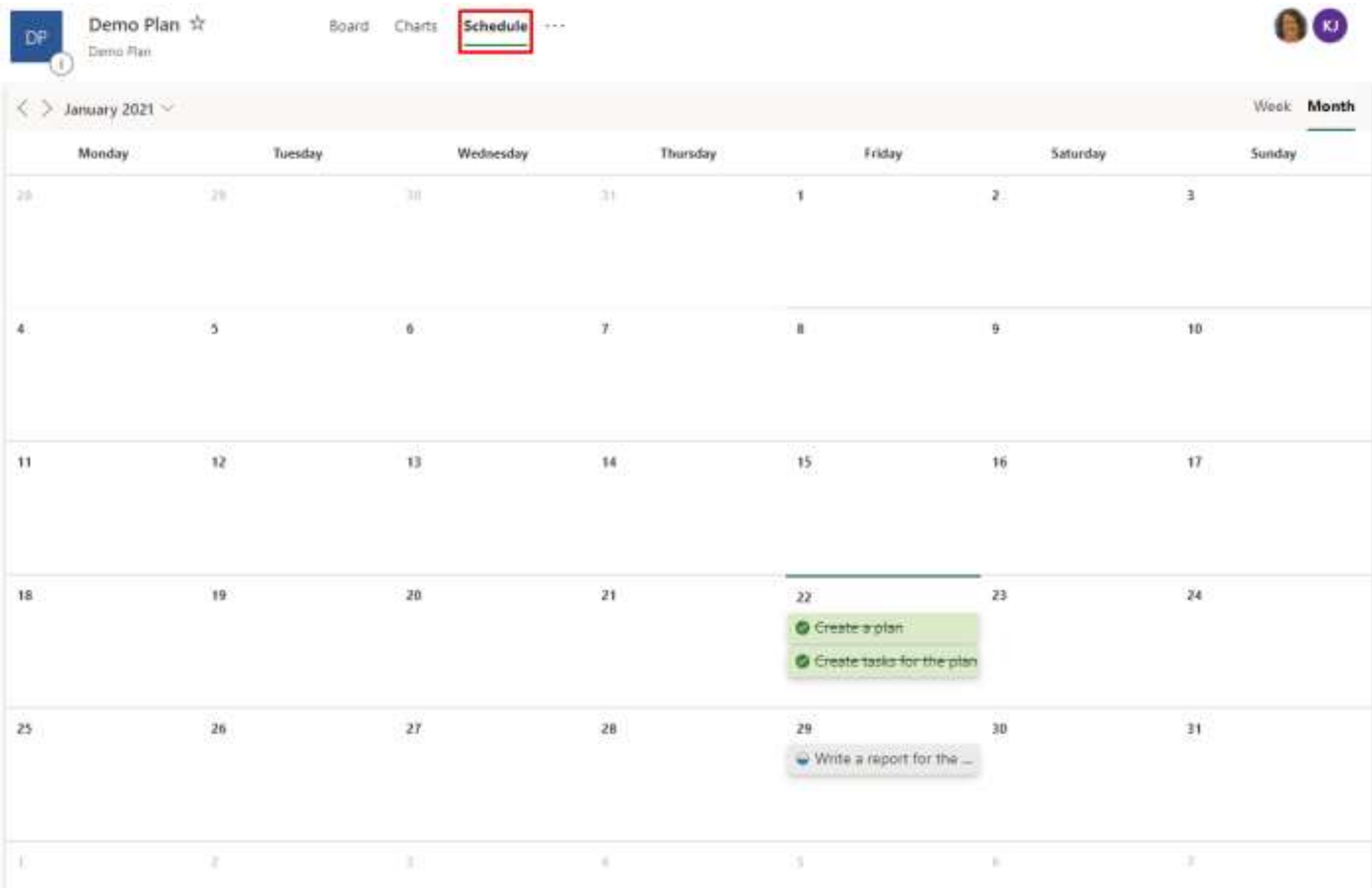

Fig. 19: Schedule screen displaying tasks in Month view.

Email notifications

You'll automatically receive email notifications when tasks are assigned to you, and when they're due. If you want to turn these on or off, do the following:

1. Select the settings button ⚙ near the top right of the screen and then choose **Notifications**.
2. In the **Notifications** dialog box (see Fig. 20), choose to have Planner send you notifications when:
   - **Someone assigns a task to me. (Email, Teams, and mobile push)**
   - **A task assigned to me is late, due today, or due in the next 7 days. (Email only)**
3. Choose **Save**.

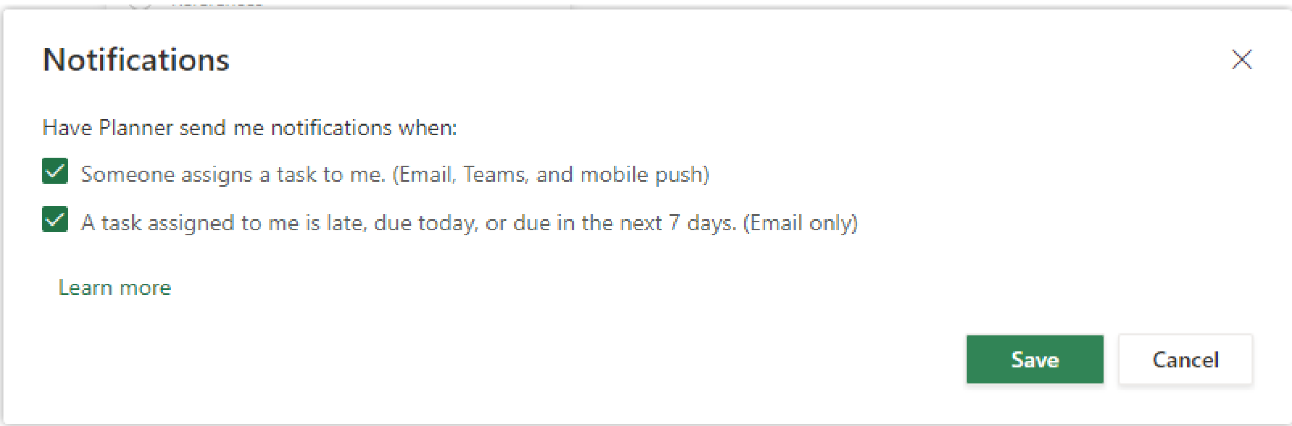

Fig. 20: Notifications dialogue box.

How to use Planner – Apps and integration

Use Planner in Microsoft Teams

1. In your team channel, select '**Add a tab +**' (see Fig. 21).

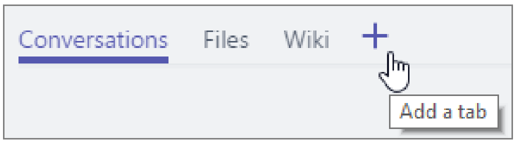

Fig. 21: Add a tab button in Teams.

2. In the Add a tab dialog box, choose '**Tasks by Planner and To Do**' (see Fig. 22).

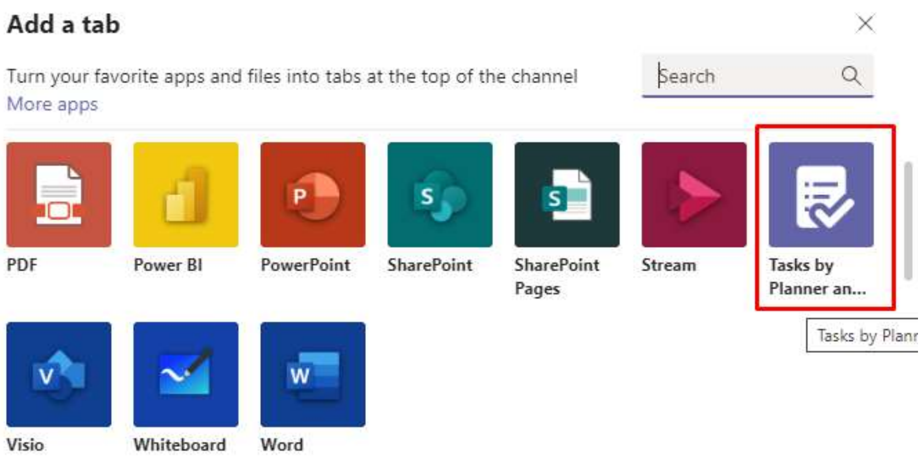

Fig. 22: Add app to tab, Tasks by Planner and To Do.

3. In the Tasks by Planner and To Do dialog box (See Fig. 23), choose:
   - **'Create a new plan'** to make a new Planner plan and add it as a tab to this channel.
   - **'Use an existing plan'** to choose an existing Planner plan to add to a tab in this channel.
   - Choose whether to post to the channel about the tab, and then select '**Save**'.

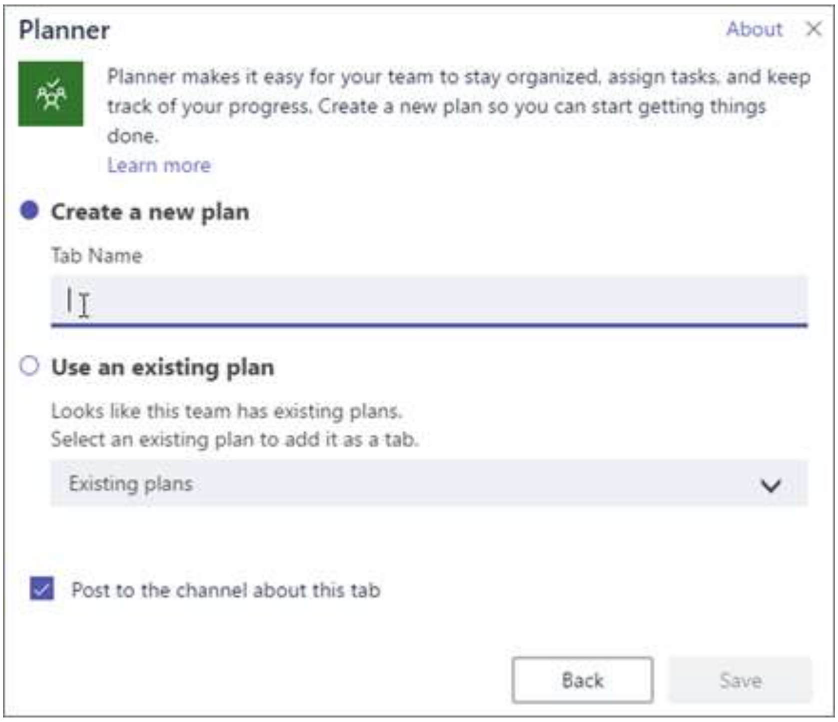

Fig. 23: Tasks by Planner and To Do dialog box.

4. The tab will be added alongside your other team channel tabs, and you'll be able to start adding tasks to your board (see Fig. 24).

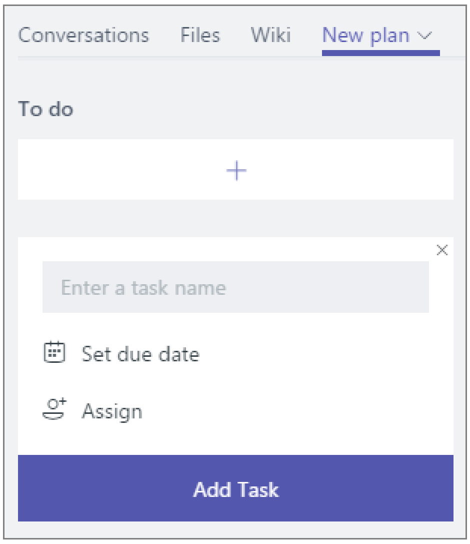

Fig. 24: Plan showing as a tab in Teams.

5. Repeat this procedure to add as many plans as you want for your channel.

Note: You can also add the same plan to multiple tabs. This doesn't create a copy of your plan.

Export a plan to Excel

If you want to sort, filter, report on, or share your Planner plan with people who aren't members of the plan, you can export your plan to Excel. Exported plans include the Plan name, Plan ID, and Date of export, as well as all of your tasks and their details.

1. In your plan menu, select the options button **'(…)'** (see Fig. 25).
2. Choose **'Export plan to Excel'**.
3. When asked what you want to do with "[Plan name].xlsx", choose either Open or Save.

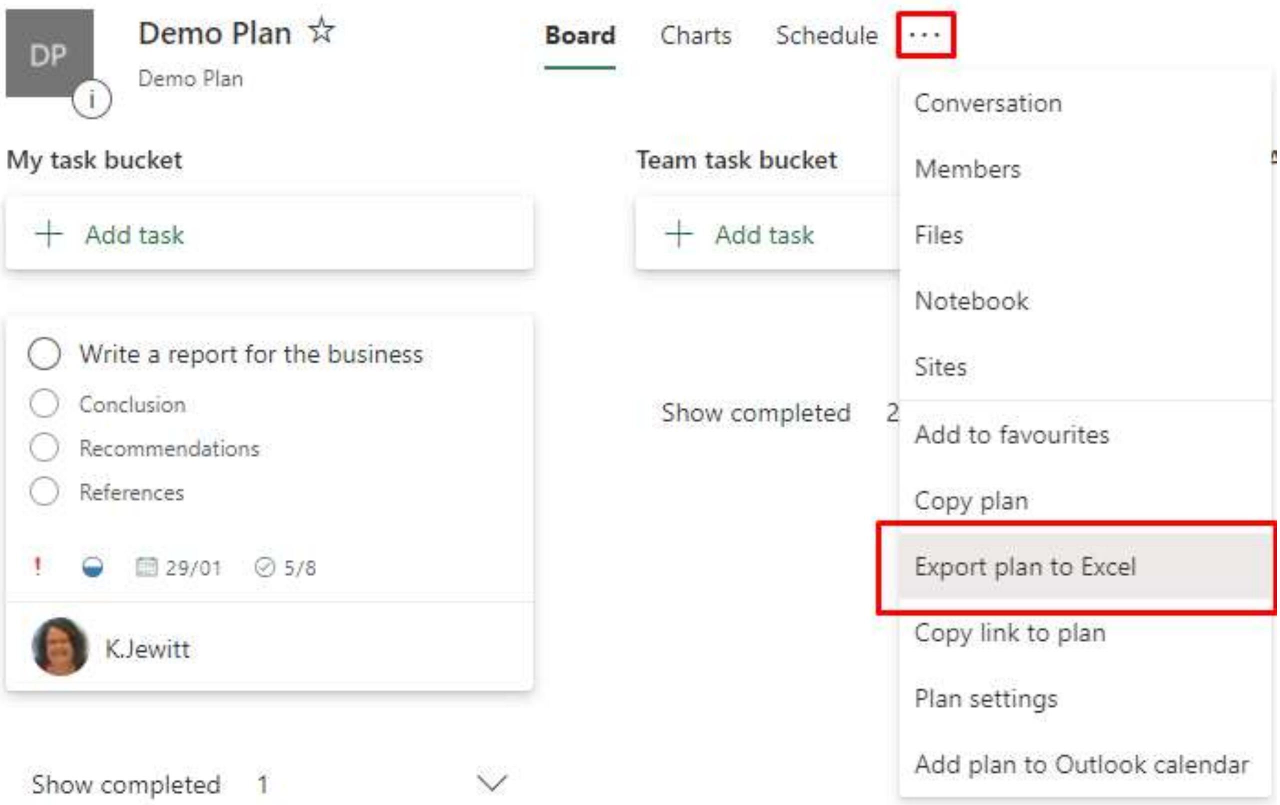

Fig. 25: Exporting a plan to Excel.

Microsoft Planner for Android

In Planner for Android, you can do most of the things you can do in Planner for web, with a slightly different look and feel. There are a few things you can currently only do in the browser, and one thing you can only do from your device: add photos using your device's camera.

What can I do with Planner for Android?

Action	Planner for web	Planner for Android
Delete a plan	Yes	No - You need to use Planner for web to delete a plan.
Add a photo by taking it with your device's camera	No	Yes
All other features	Yes	Yes

Add a photo using your device's camera

In Planner for Android, you can seamlessly attach a photo to a task using your device's camera.

1. In Planner for Android, in one of your plans, tap a task.
2. Tap ‘**Add attachments**’.
3. In the lower right corner of your screen, tap the plus sign (**+**).
4. Tap ‘**Add image from camera**’.
5. Take a photo and, if you want to use it, tap ‘**Ok**’. Otherwise, tap ‘**Retry**’.

Your photo now appears in your list of Attachments. Tap the **'back'** arrow to see this photo on your task card. The first photo added appears on your task card, but you can change this on the Attachments page by tapping the ellipses on a photo and then tapping '**Show on card'** or '**Don't show on card'**.

Planner is available as an iOS app via the following link: https://play.google.com/store/apps/details?id=com.microsoft.planner

Microsoft Planner for iOS

In Planner for iOS, you can do most of the things you can do in Planner for web, with a slightly different look and feel. There are a few things you can currently only do in the browser, and one thing you can only do from your device: add photos using your device's camera.

What can I do with Planner for Android?

Action	Planner for web	Planner for iOS
Delete a plan	Yes	No - You need to use Planner for web to delete a plan.
Add a photo by taking it with your device's camera	No	Yes
All other features	Yes	Yes

Add a photo using your device's camera

In Planner for iOS, you can seamlessly attach a photo to a task using your device's camera.

1. In Planner for iOS, in one of your plans, tap a task.
2. Tap '**Add attachments'**.
3. In the upper right corner of your screen, tap the plus sign '(**+**)'.
4. Tap '**Take photo'**.
5. Take a photo and, if you want to use it, tap '**Use Photo'**. Otherwise, tap '**Retake'**.

Your photo now appears in your list of Attachments. Tap the back arrow **'(<)'** to see this photo on your task card. The most recent photo added appears on your task card, but you can change this on the Attachments page by tapping the ellipses on a photo and then tapping **'Show on card'** or **'Don't show on card'**.

Planner is available as an iOS app via the following link: https://apps.apple.com/gb/app/microsoft-planner/id1219301037