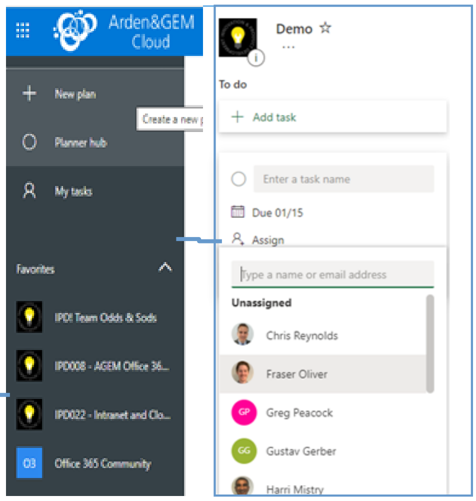
MICROSOFT PLANNER

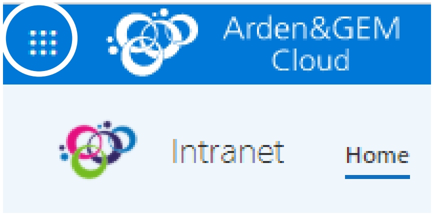
Quick Reference Guide

A simple, visual way to organise teamwork

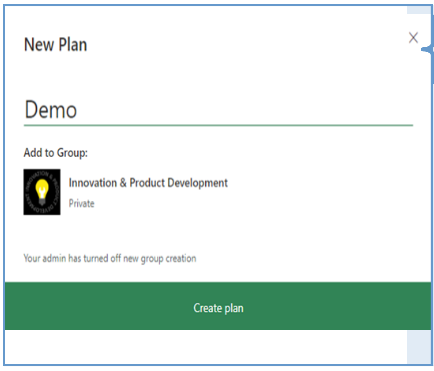
WHAT IS PLANNER?

Planner is a tool that helps teams organise, assign tasks and track projects within their team
Name your plan, and then select Add to an existing Office 365 Group.





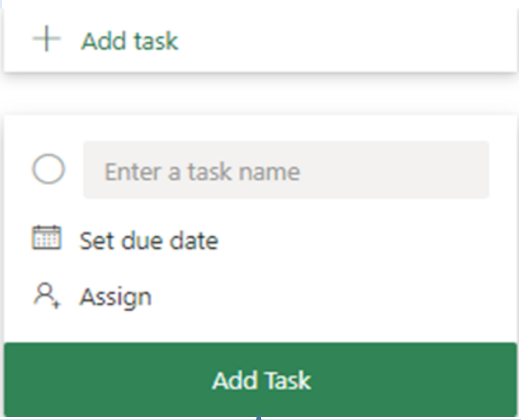
To access Planner, click on the waffle in the top left (Circled) and simply select Planner from the options that are presented

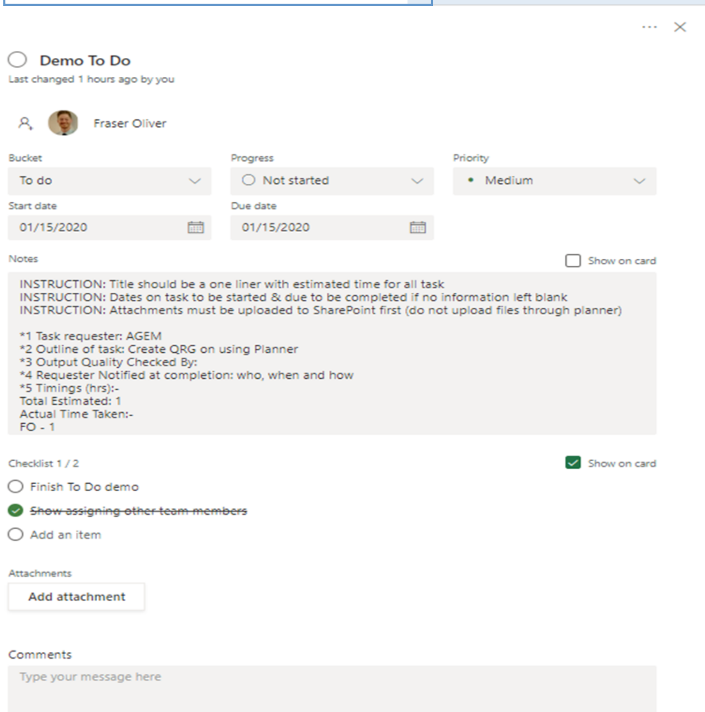


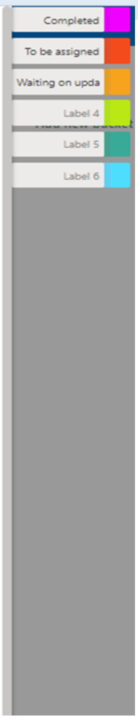
Enter a task name in the box under To do, and then choose Add task

Select a task to get to its details, and then add a Start date and a Due date. Due dates are shown in red if the task is overdue.

Start and due dates help give your plan some structure, so that your team knows what needs to happen and when.





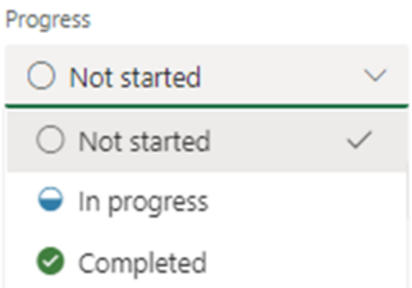


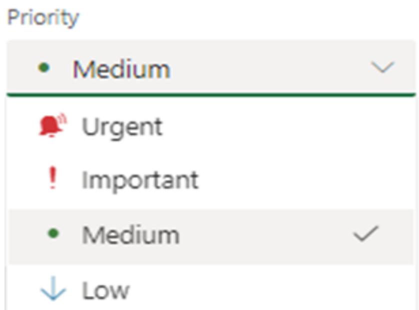
You can assign someone when you create a task. Add a task name, and then select Assign to choose a plan member from the list. If the right person isn't listed, type a name or email address in the search box to add someone new. You can assign a task to more than one person.
When a task is being worked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

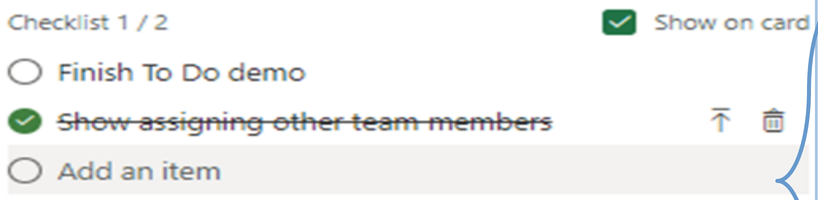
On the Board, select a task to open details, and then choose the coloured boxes on the top right side. Select the flag you want to use, and then give it a name. Once you've defined labels on one task, they're available to all tasks in the plan.

Sharing out task progress doesn't have to involve complicated calculations. In Planner, it's simple. Tasks can be: Not started, in progress or Completed

Additionally, you can set the priorities of a task as well, from: Low, Medium, Important or Urgent.



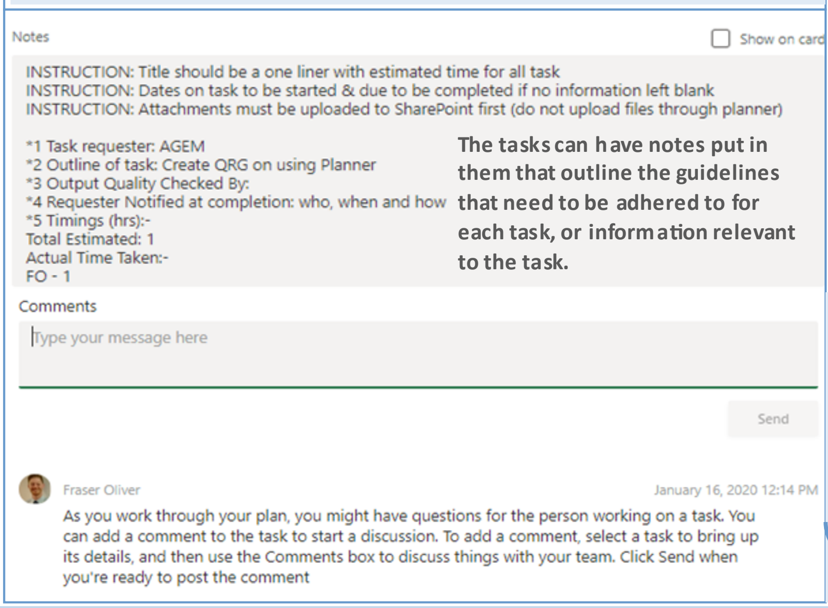




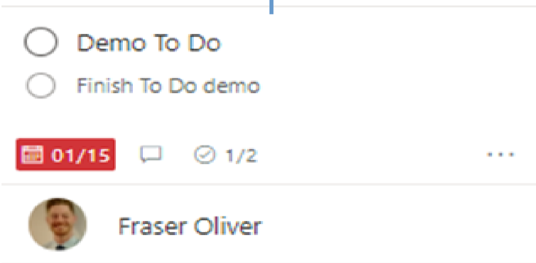
When you tick something off the plan checklist, it will be hidden from the plan view, meaning that only tasks that need to still be completed are visible here, meaning the entire team is on the same page and work isn't replicated. You can see the number of tasks that have been checked off in the task along with the due date. If the due date is shaded red it means it is overdue.

Sometimes you may need more than simple task progress:

Need a to-do list to track progress? Try using a checklist to keep track of task details!



The tasks can have notes put in them that outline the guidelines that need to be adhered to for each task, or information relevant to the task.



Next you create your "Buckets". Buckets are a way to help break things up into phases, types of work, departments, or whatever makes the most sense for your plan.

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