

Microsoft® Planner for Office 365™ Quick Reference



Exploring the Planner for Office 365 Interface

Planner for Office 365 is a cloud-based app that is included with most business and enterprise Office 365 subscriptions. It allows you (and your team) to create plans in which you can create and organize tasks, and assign them to plan members. As plan members work on tasks, they can update the progress of their tasks, as well as view the status of other members. Different views, as well as functionality to filter and group tasks, allows all plan members to get an up-to-date view of a plan's status. Planner integrates with other Office 365 apps like SharePoint Online (for file sharing), and Teams (where you can insert a plan directly into a channel) to name a few.

Navigation pane – Allows you to select different panel views as described below.

- **New plan** – Allows you to create a new plan and identify who can share your plan.
- **Planner hub** – Displays all of the existing plans, including categories for *Favorite plans*, *Recent plans*, and *All plans*.
- **My tasks** – Shows all the tasks that have been assigned to you (from all plans), including their status (Not started, In progress, or Completed).
- **Favorites** – Lists the plans that have been marked as such, to allow quick access to them. Click the Favorites ☆ button in the Task window.
- **Recent plans** – Displays the plans that have recently been opened.

Buckets – Allows you to organize tasks into related groups that you create. Each bucket appears as a separate column. See “Creating Buckets” on page 2.

Planner views – Allows you to view tasks in a variety of ways. The *Board* view (shown directly below) displays tasks in text-card mode. The *Chart* view shows a graphical display of the task progress. The *Schedule* view allows you to see tasks in a weekly or monthly view. See “Working with Planner Views” on page 3.

Members button – Allows you to identify and assign members to tasks. See “Adding Members to Plans” on page 2.

Group by button – Allows you to display tasks (in columns) grouped by predetermined categories. In the example shown to the left, tasks are grouped by *Bucket* where each bucket name appears in a separate column. See “Grouping Tasks” on page 4.

Filter button – Allows you to quickly locate a task that may not be visible on the current screen. You can type a keyword(s) to search, and/or click predetermined criteria based on time, assigned labels, or team members. See “Filtering Tasks” on page 4.

Task Cards – Displays the details of a task in a summarized view. In addition to displaying the task name and description, various icons (shown below) identify different aspects of a task such as task status, due date, file attachments, checklists, task labels, and member conversations. See “Adding and Managing Task Details” on page 2.

Chart view – Allows you to graphically show the task status, bucket status, member status, as well as task details (in the pane on the right), which may be filtered and/or grouped. The example below shows the task status filtered by the *Due status Late* and grouped by *Bucket*, resulting in only one task being displayed in the *Pre-Meeting List* bucket (in the pane on the right). See “Working with the Chart View” on page 3.

Task name
Task label(s)
Complete task icon
Task description
Task checklist
Attachment icon
Due date icon
Task status icon (e.g. In progress)

Prepare Meeting Room
 Check projection and PA system.
 Distribute reports at each seat.
 Ensure coffee and water are available.
 11/08 0/3
 Mark Billington

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Status

Late: 1
16 Tasks left

| | |
|-------------|----|
| Not started | 12 |
| In progress | 3 |
| Late | 1 |
| Completed | 3 |

Tasks

Pre-Meeting List

Locate AGM Planning 2019 Survey
 Carol Hurtig

AGM Meeting

AGM Reception

Completed

Featured Objectives

PAGE 1

Exploring the Planner for Office 365 Interface

- Learn how the Planner user interface, including its screen components and how to use them.

PAGE 2

Getting Started

- Learn how to launch Planner, sign out of Office 365, and locate existing plans.

Working with Plans and Tasks

- Learn how to locate and open plans from the Planner hub, create plans, add members, and create buckets. Also learn how to create tasks including adding and managing task details such as assigning Buckets, assigning members, assigning progress levels, attaching files, as well as assigning task labels.

PAGE 3

Viewing Plans and Tasks

- Learn how to access the three different views of Planner, as well as how to use the various filter options and Group By options to help narrow down your search for finding your tasks and results.