

## What is Office 365 Planner?

Our simplest explanation is that it's a way to organize teamwork – similar to Asana, Slack or Wunderlust for task/ project management. 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.

## Planner and Groups

Office 365 Planner ties in very closely to Office 365 Groups. Every time a new plan is created then a new Office 365 Group is automatically created and vice versa - if you have a pre-existing Group then a plan will automatically be created for this Group.

## Using Planner

### Plans

To start, you need to create your first plan. As mentioned earlier, 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:

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. It shows all the key information easily so you can see what is late, in progress, not started and completed.

New Plan

Plan name

Like 'Sales Pipeline' or 'Website Redesign'

Plan email address

Make this plan public

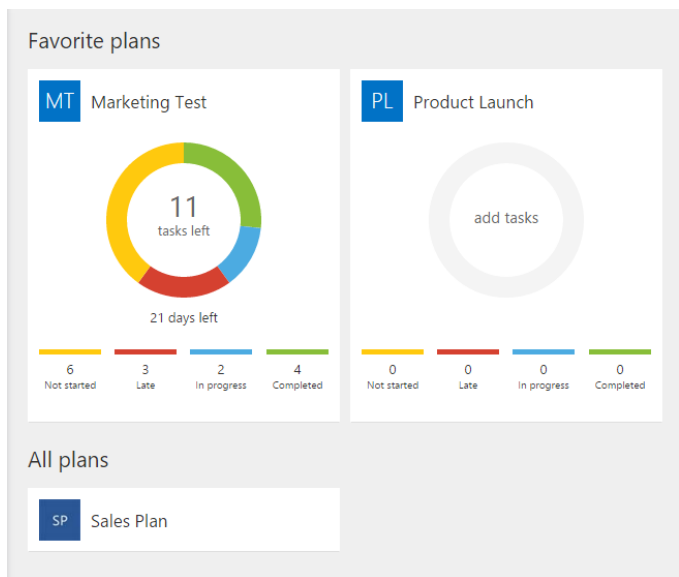
☒ Yes

Plan description

Add information about your plan for other people to see. (Optional)

Create Plan

Cancel

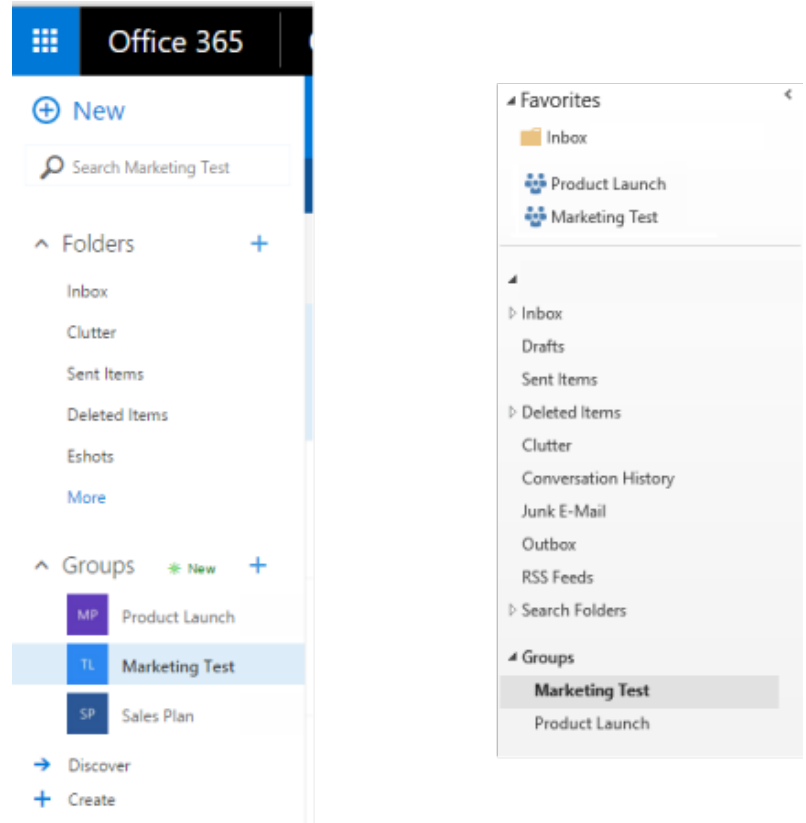


## Groups

With your new plan, you can add group members – just start typing and it will automatically list contacts after you type 3 letters. If the contact isn't listed then you can type in their email address – but only business email addresses are allowed.

Whoever is added to the Plan will also be added to the Group automatically and they will see the Group appear in their Outlook. The Outlook Web App, just shows all Groups together but if you favorite a plan in the installed Outlook, then it appears in your favorites at the top; if not, it just appears below your Inbox in a Groups section, like below

When anyone is added to a plan they receive an email notification into their inbox welcoming them to the Plan and team and gives some useful starter information.



Groups in Outlook Web App and Outlook

## You're now a member of the Sales Plan group


SP

Use the group to share messages and files, and to coordinate group events.

[Go to the group](#)


Private group - [View members](#)


### Get group messages and events in your inbox


 Subscribe if you want to receive group conversations and calendar events in your inbox. Otherwise, you'll only see them in the group inbox.

[Subscribe](#)

### Explore the group

 [See conversations](#)

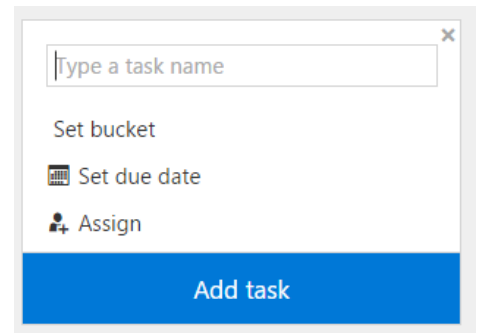
 [Check out the calendar](#)

 [Read group files](#)

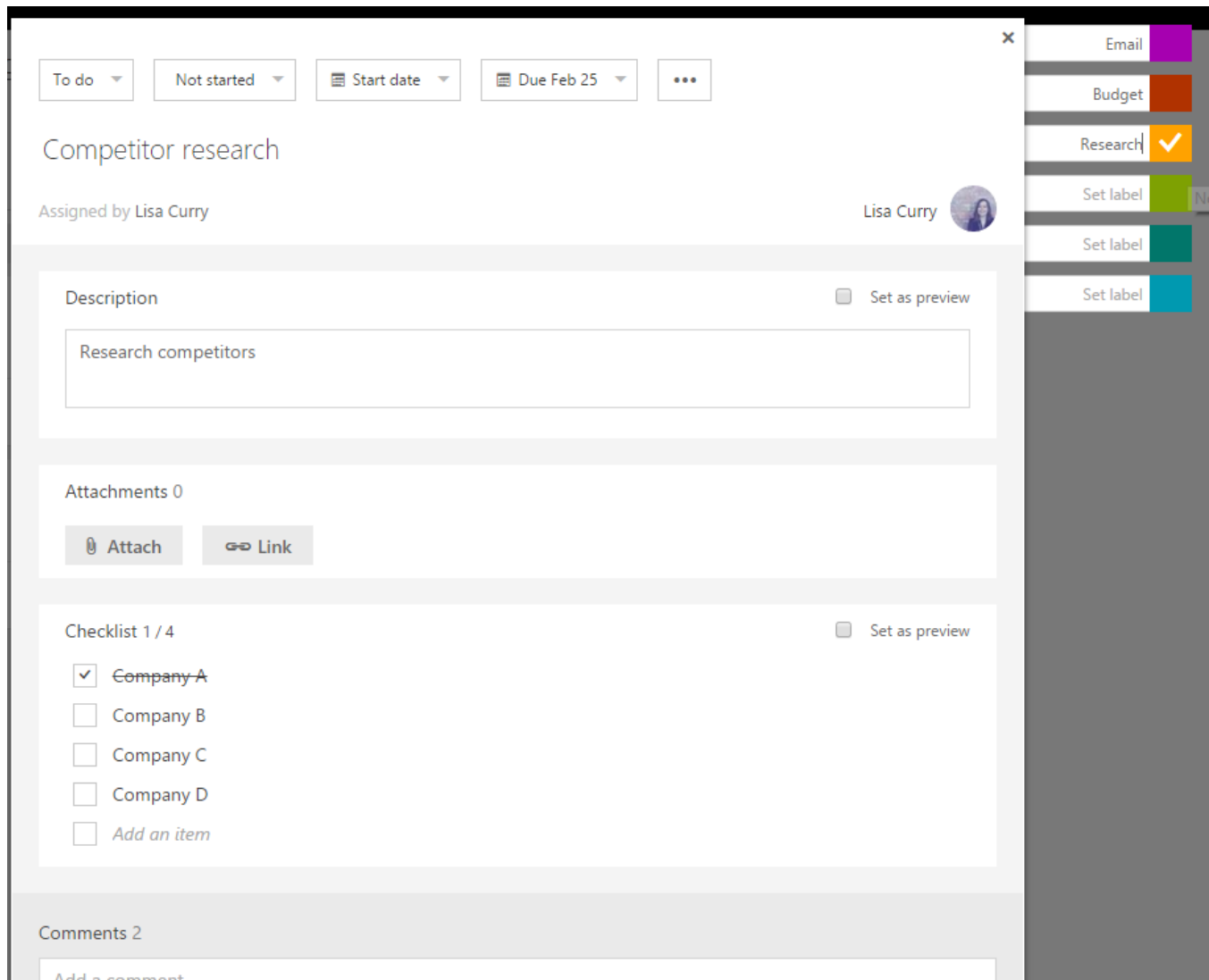
## Tasks

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.

Once you've created a task, 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 and finally comments. There are also little 'post-it' tabs on the side, which you can use to color coordinate different tasks. This is how it looks



A modal window for creating a new task. It features a text input field at the top labeled "Type a task name". Below this are three options: "Set bucket", "Set due date" (with a calendar icon), and "Assign" (with a person icon). At the bottom is a prominent blue button labeled "Add task".

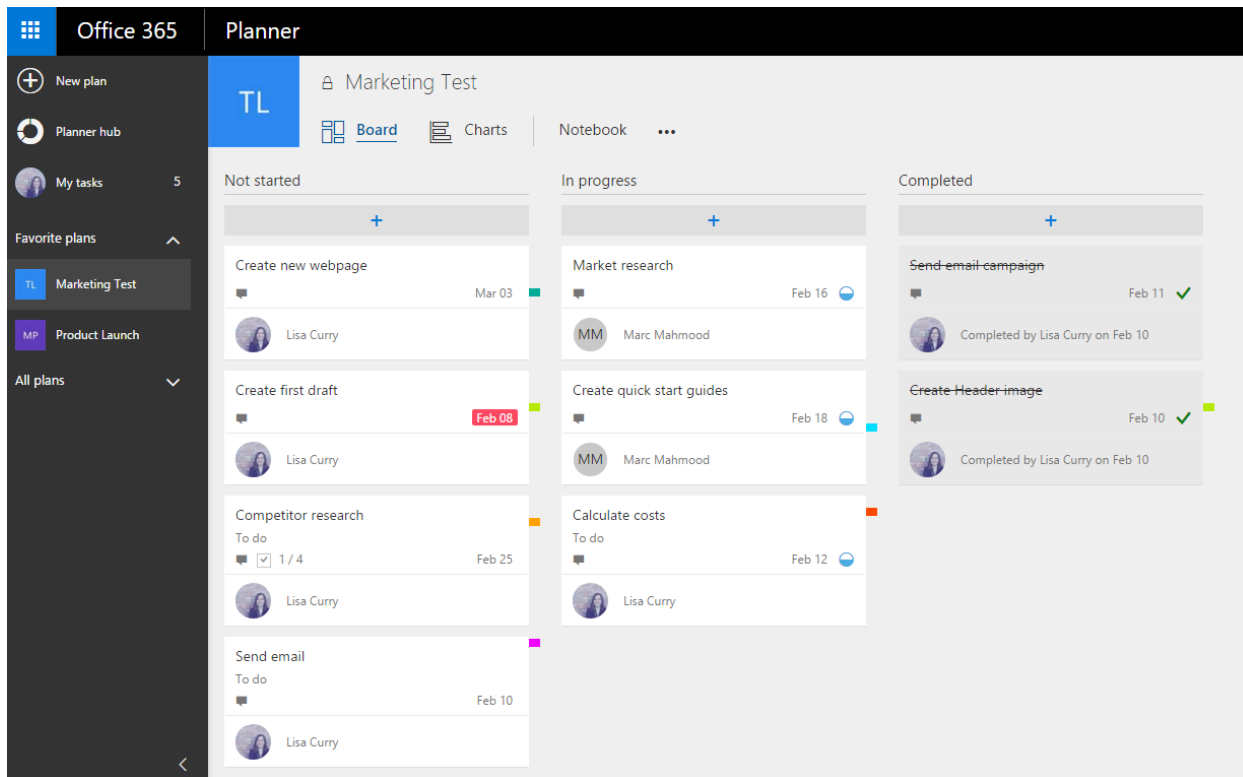


A detailed view of a task titled "Competitor research". At the top, there are filters: "To do", "Not started", "Start date", and "Due Feb 25". The task is assigned to "Lisa Curry". The main content area includes:
 

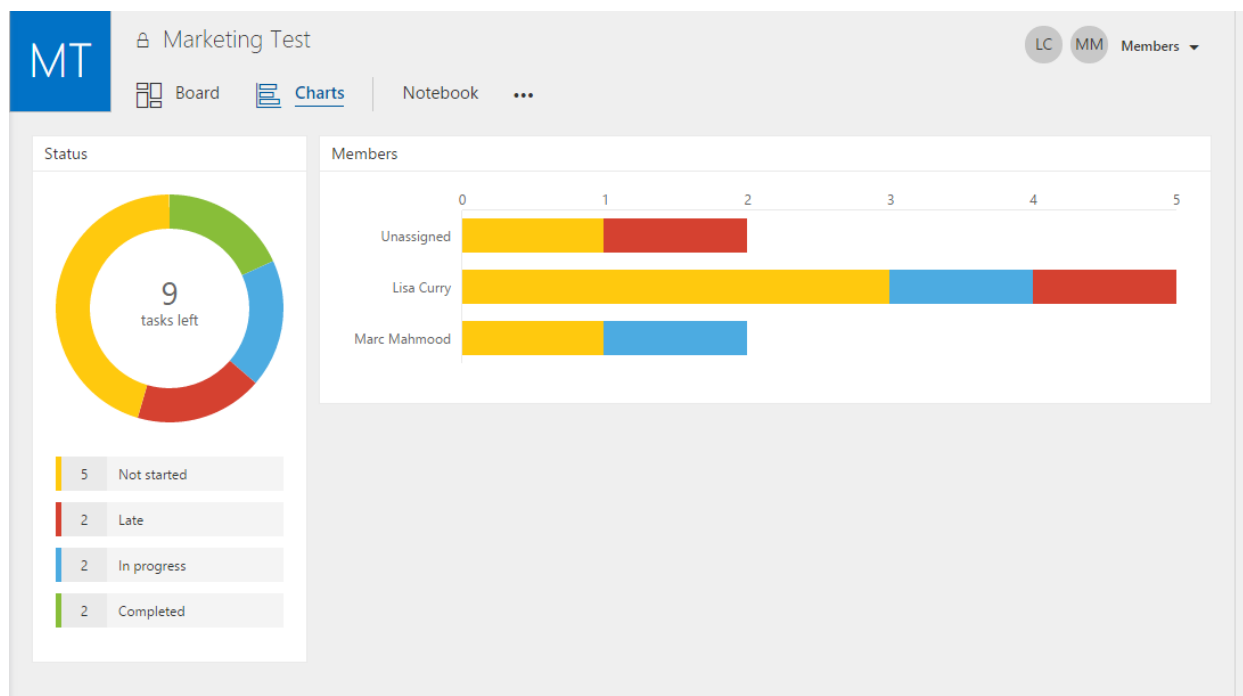
- Description:** A text box containing "Research competitors" and a "Set as preview" checkbox.
- Attachments:** A section showing 0 attachments with "Attach" and "Link" buttons.
- Checklist 1 / 4:** A list of items: "Company A" (checked), "Company B", "Company C", "Company D", and "Add an item". It also has a "Set as preview" checkbox.
- Comments:** A section showing 2 comments with an "Add a comment" input field.

 On the right side, there is a vertical sidebar with color-coded tabs: "Email" (purple), "Budget" (orange), "Research" (yellow, with a checkmark), and several "Set label" tabs in green, teal, and blue.

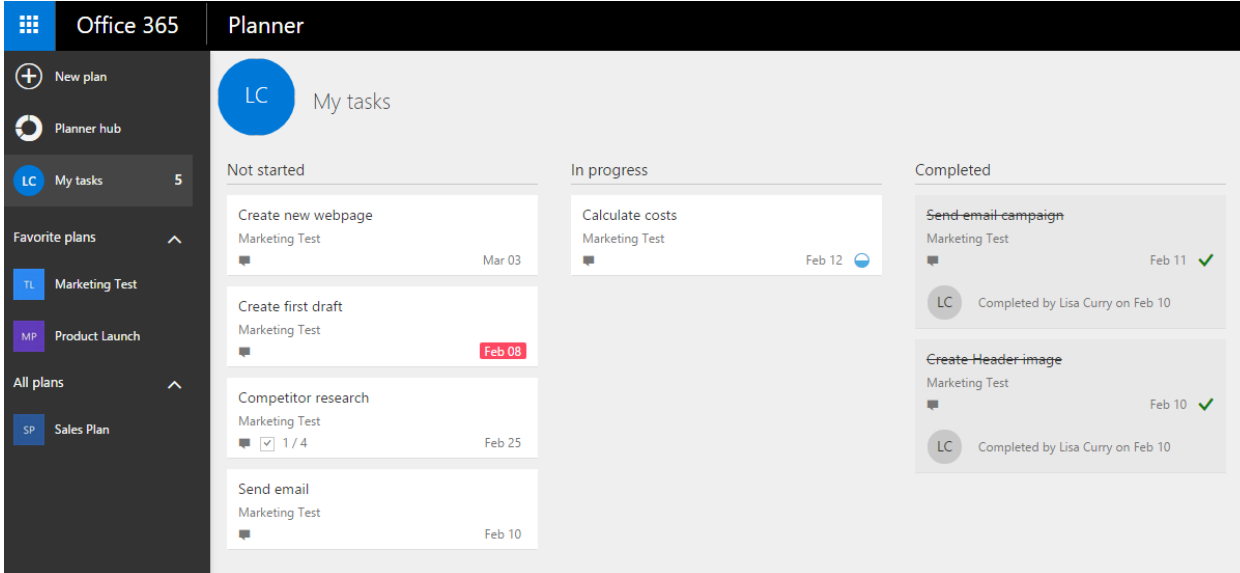
You can view your tasks on the Board tab or the Charts tab. The Board tab shows what stage the tasks/ cards are at and gives the detail into each task. if a task is overdue than the date is highlighted in red. If you complete a task you can either tick it (which appears when you hover over the card),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



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. It's a great way of quickly seeing the status of a project and especially if anything is overdue.



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



The screenshot shows the Microsoft Planner interface. On the left is a dark sidebar with navigation options: 'New plan', 'Planner hub', 'My tasks' (selected, showing 5 tasks), 'Favorite plans' (listing 'Marketing Test' and 'Product Launch'), and 'All plans' (listing 'Sales Plan'). The main area is titled 'Planner' and 'My tasks'. It displays three columns: 'Not started', 'In progress', and 'Completed'. Under 'Not started', tasks include 'Create new webpage' (Mar 03), 'Create first draft' (Feb 08), 'Competitor research' (Feb 25, with a sub-task '1 / 4'), and 'Send email' (Feb 10). Under 'In progress', there is one task 'Calculate costs' (Feb 12). Under 'Completed', there are two tasks: 'Send email campaign' (Feb 11, completed by Lisa Curry on Feb 10) and 'Create Header image' (Feb 10, completed by Lisa Curry on Feb 10).

### Notifications

Notifications are always one of the trickiest aspect of task management. Too few and you don't stay on top of what you need to do or miss discussions; too much it gets very annoying quickly. At the moment, any activities within the Plan are emailed into the Group inbox, which is a shared mailbox with the whole team (or 'Group')'. If you subscribe to the Plan, then you will be emailed when tasks are completed, assigned, commented on etc. If you unsubscribe, you still get email notifications in your inbox, but just around your tasks.