A QUICK GUIDE TO

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PLANNER

![Microsoft logo]

WHAT IS PLANNER?

Microsoft Planner is a to-do app that comes with Office 365. It's used for personal and teamwork planning, with a simple card-based interface

Microsoft Planner allows you to create new plans, assign tasks, and share files with others as well as organize teamwork and collaborate on projects in a simple, visual way. Collaboration means you can chat with others to make sure you're on the same page when working on a project or team task.

CREATING PLANS

In Planner, every plan has a board and charts.
- 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 get details about any task.
- The charts show how your plan is progressing, with details about what's done, in progress, not started, and late.

CREATING TASKS

Select + Add task below the heading of the bucket to which you want to add a task.

Select Enter a task name.

Type the task name.

Do either of the following:

- Press Enter to create a task without a due date.

- Select Set due date and select a date. Then select Add Task to create a task with a due date.
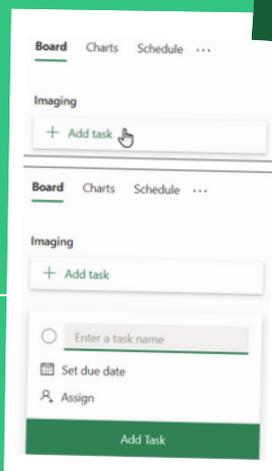
CHARTS

In Planner, use the Charts view to see how your work is progressing.

You can see how many tasks are running late in the **Status** chart, which lists how many tasks are **Not started**, **In progress**, **Late**, and **Completed**.

PLANNER IN TEAMS

You can organize your tasks by adding one or more Planner tabs to a team channel.

When you add a plan on a channel tab, you can see your plan in context of the rest of your team conversations, files, and more.

You can get a Teams notification when a Planner task is assigned to you by another person if your team has Planner installed and your plan has a tab in Teams.
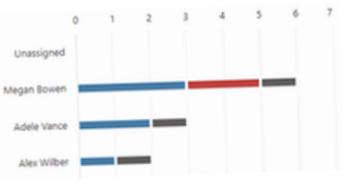
Your Planner assignment will produce a notification in Teams that contains the task title, who assigned the task, the plan the task belongs to, and a link to open the task details in Teams.

ASSIGN TASKS

In Planner, select Members, and then enter the name of the person you want to add.

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 see if one person has more tasks than everyone else. The bars on the Charts view show the number of tasks each person is assigned in the plan, color-coded by progress.

WHERE CAN I USE PLANNER?

Download on the App Store

GET IT ON Google Play

ACCELERATE LEARNING WITH THE RIGHT TOOLS; FIND ADDITIONAL QUICK GUIDES TO GET STARTED