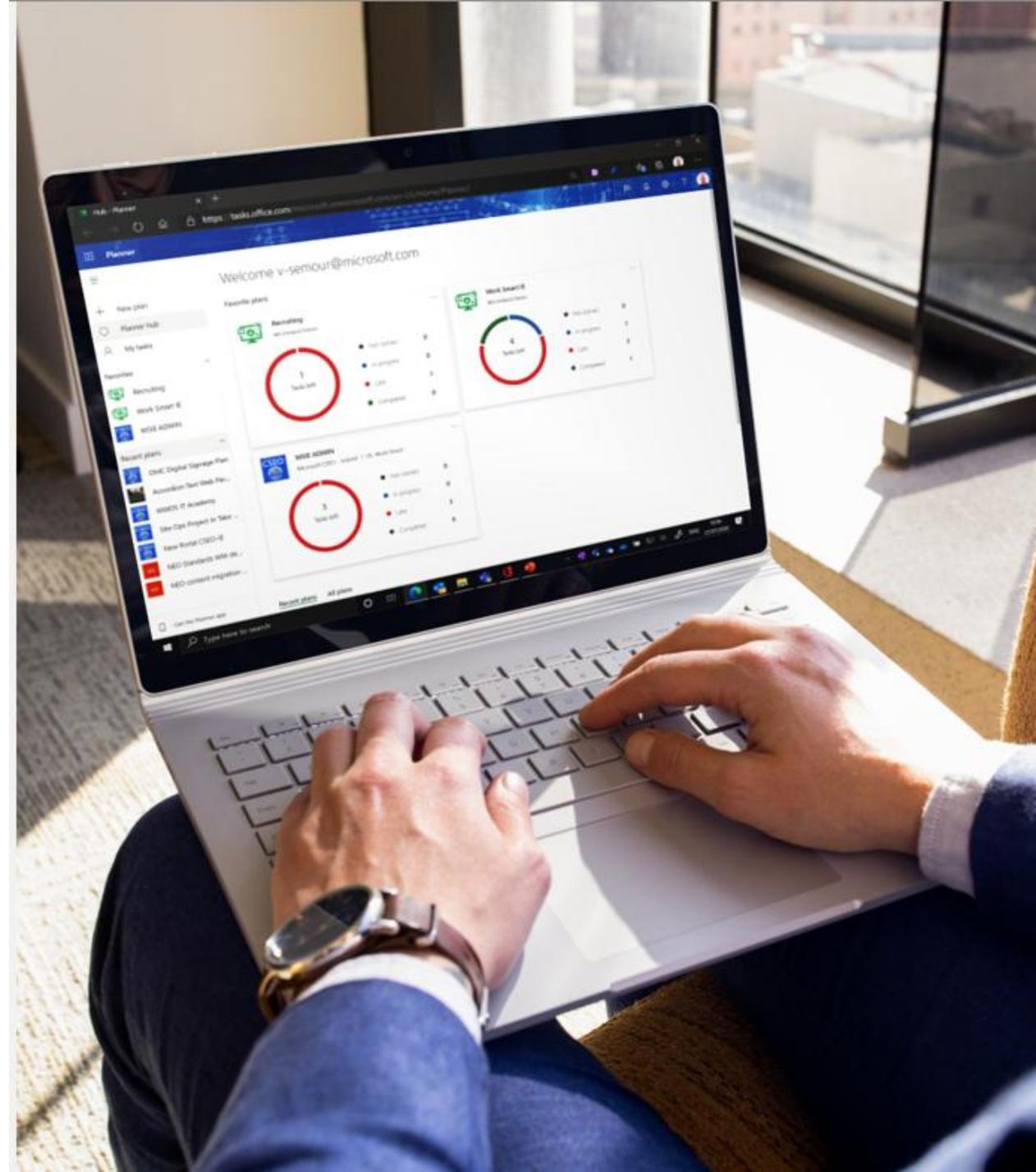


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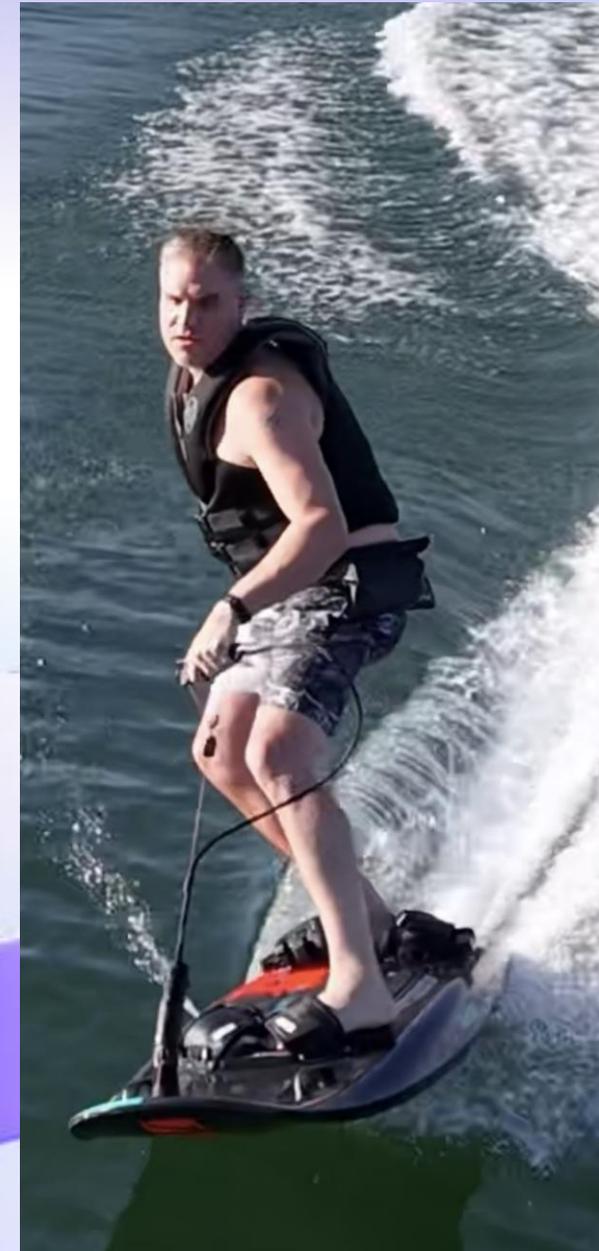
# Planner

Presented By  
Josh Meredith





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State and Local Government division  
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# Agenda

The basics

Creating a plan from M365 Copilot in Teams

Plan views: Board, Schedule, Charts

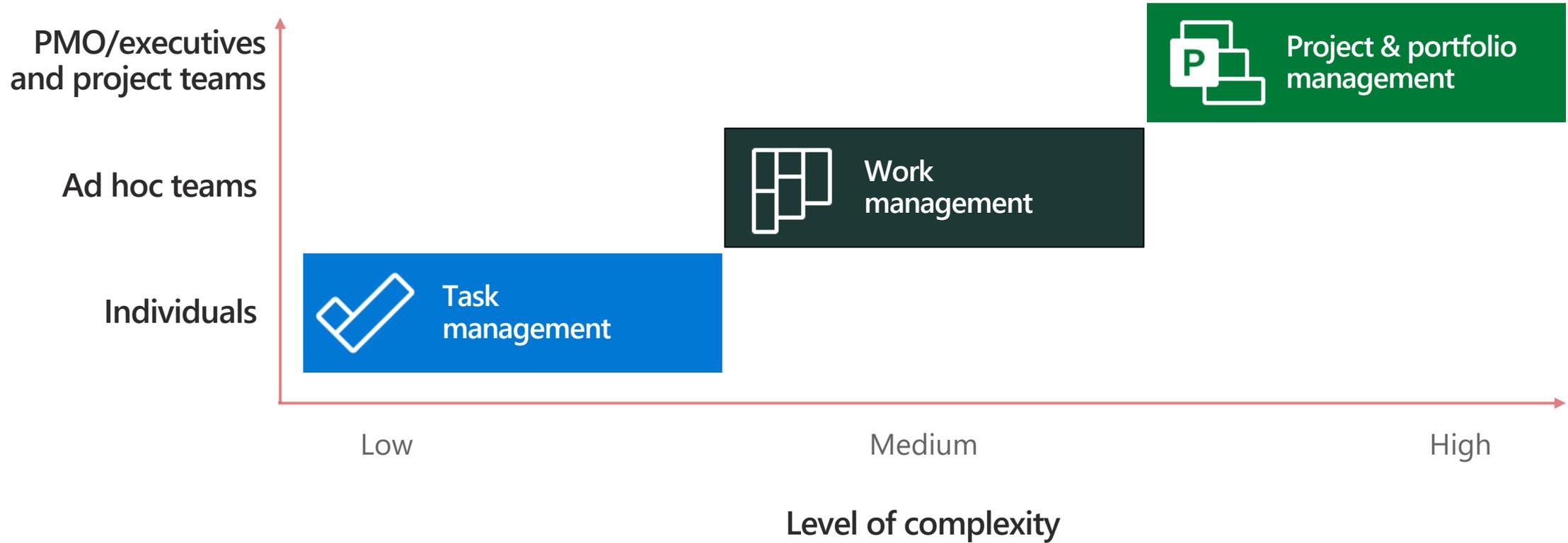
Plan structure: buckets, tasks, checklists, labels

# What is it?

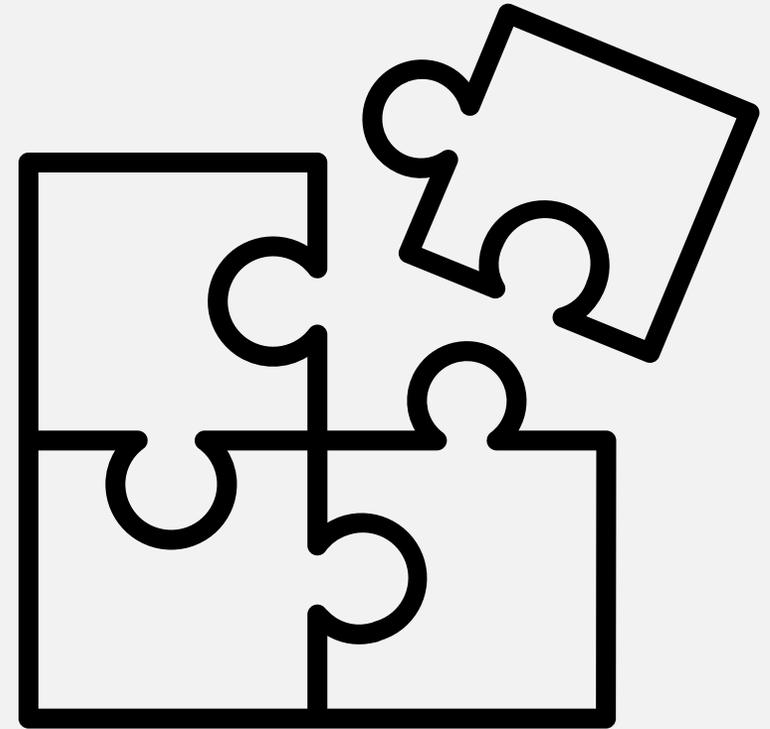
Planner is a *work management tool* that enables users to efficiently and effortlessly collaborate on the work they do together.

- Use Planner to manage project tasks
- Create plans in a few clicks
- Keep the team on the same page
- Plan from anywhere

# Positioning



# Creating a plan from M365 Copilot in Teams



# Planner Hub

Central area to access your plans

Create a plan

Keep certain plans as favorites

See recent or all plans

The screenshot displays the Microsoft Planner Hub interface. At the top, a blue header bar contains the 'Planner' logo and navigation icons. A dark sidebar on the left provides navigation options: 'New plan', 'Planner hub', 'My tasks', 'Favorites' (with sub-items 'DublinCampus' and 'Work Smart Ireland - De...'), 'Recent plans' (with sub-items 'Initiatives' and 'Project Den Haag'), and 'Get the Planner app'.

The main content area features a welcome message for 'Sergio Moura (IT Alliance)'. Below this is a promotional banner for the 'Planner in your pocket' mobile app, which includes a 'Get the app' button. The 'Favorite plans' section displays two plan cards:

- DublinCampus** (Work Smart Ireland (DEMO) > SharePoint Link): A donut chart shows 6 tasks left. The status breakdown is: Not started (2), In progress (0), Late (4), and Completed (2).
- Work Smart Ireland - Demo** (Work Smart Ireland (DEMO)): A donut chart shows 1 task left. The status breakdown is: Not started (0), In progress (0), Late (1), and Completed (0).

The 'Recent plans' section is currently set to 'All plans' and shows a list of plans including 'Initiatives', 'Project Den Haag', 'CSEO Tasks', and 'AV Link Operations'.

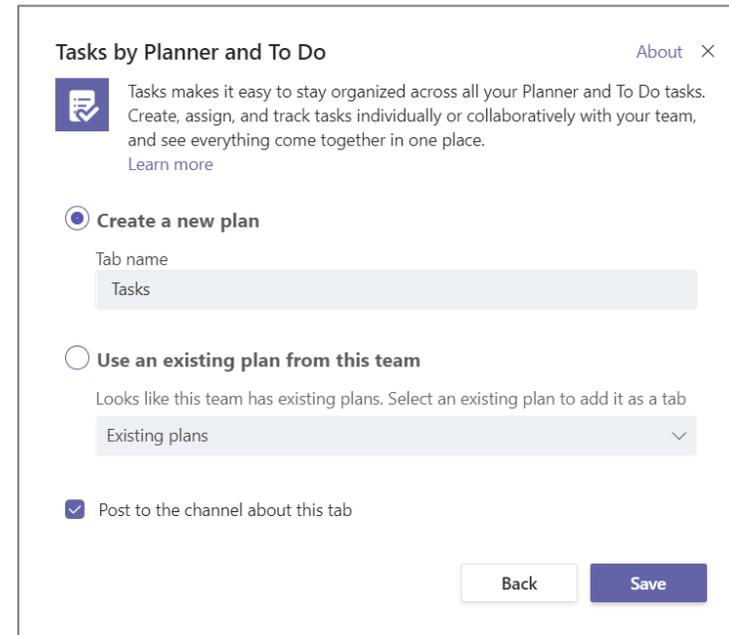
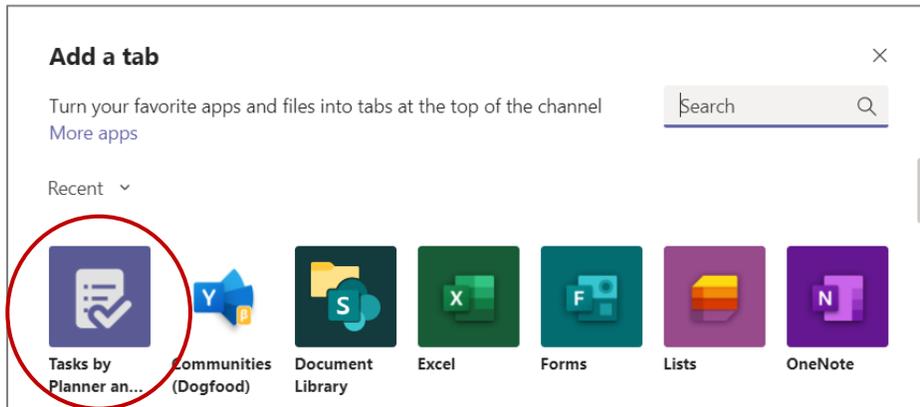
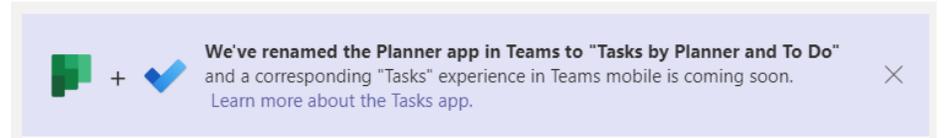
# Creating a Plan in Teams

Create plans in Microsoft Teams channels

Add a tab and choose **Tasks by Planner and To Do**.

Choose a name and whether to post to the channel about the new tab.

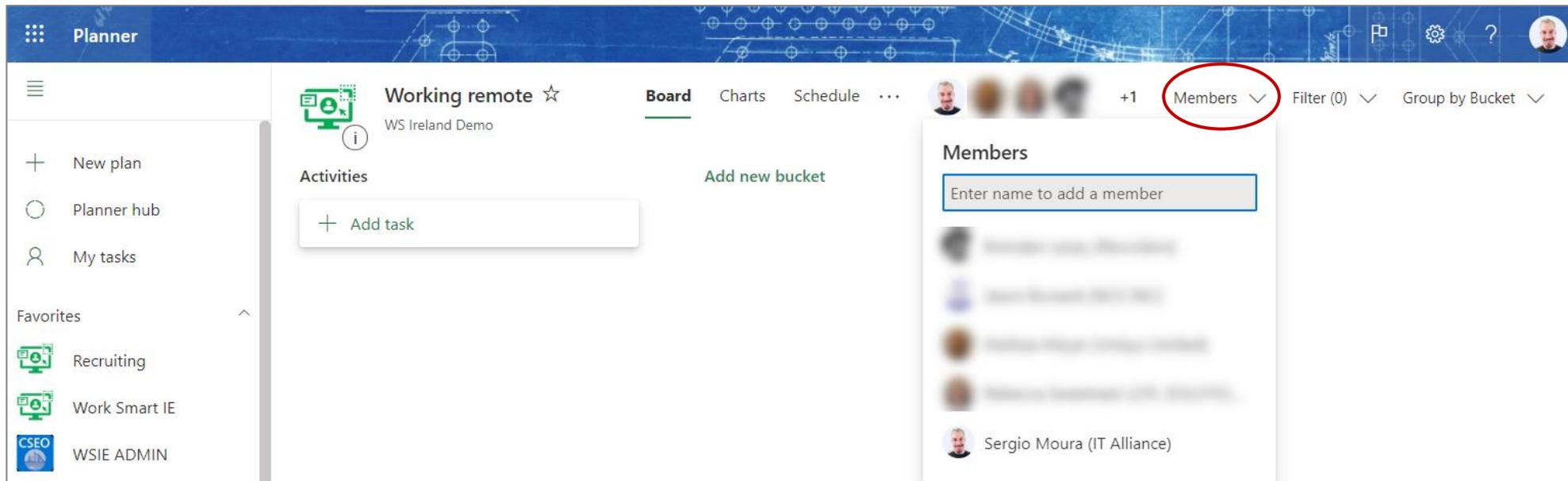
Or choose an existing plan from your Team if one was created via the Planner Hub.



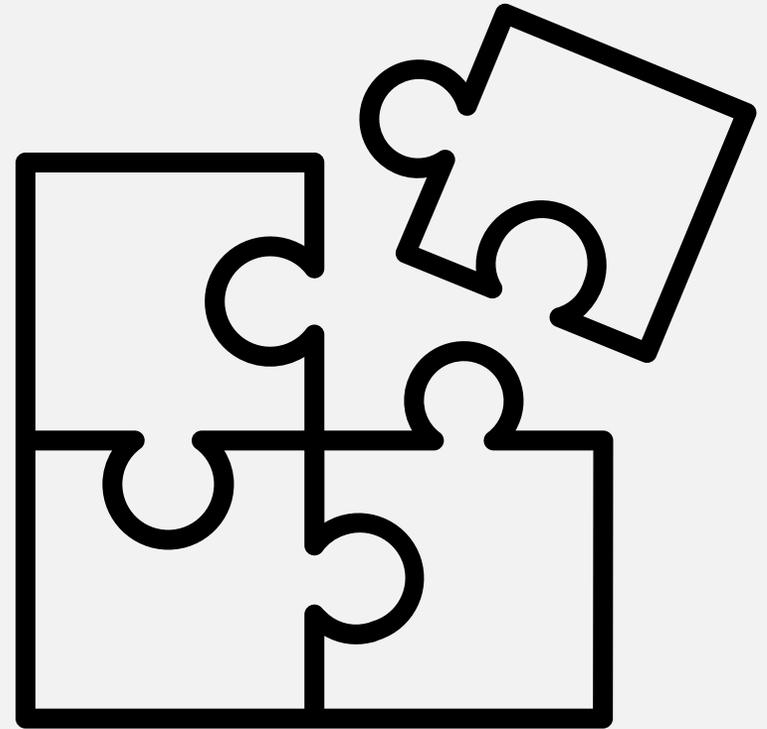
# Adding members to a Plan

On the Planner Hub, click the **Members** dropdown and then type the name of a colleague;

**IMPORTANT:** if a colleague who is not yet a member of the Microsoft Team associated with that Plan, he/she will be then automatically added to that Team!



**Plan views: Board,  
Schedule, Charts**

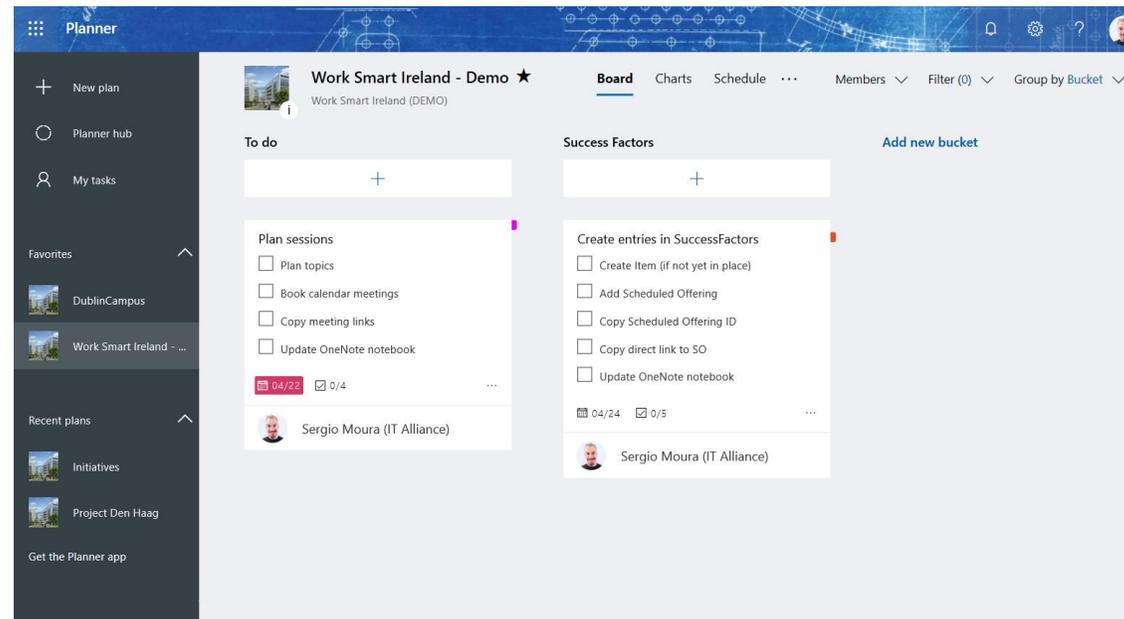


# Board

The Board is the main view of your plan

The "To do" is the default bucket - add tasks, assign users and due dates

For more complex plans, categorise your tasks under as many buckets as needed

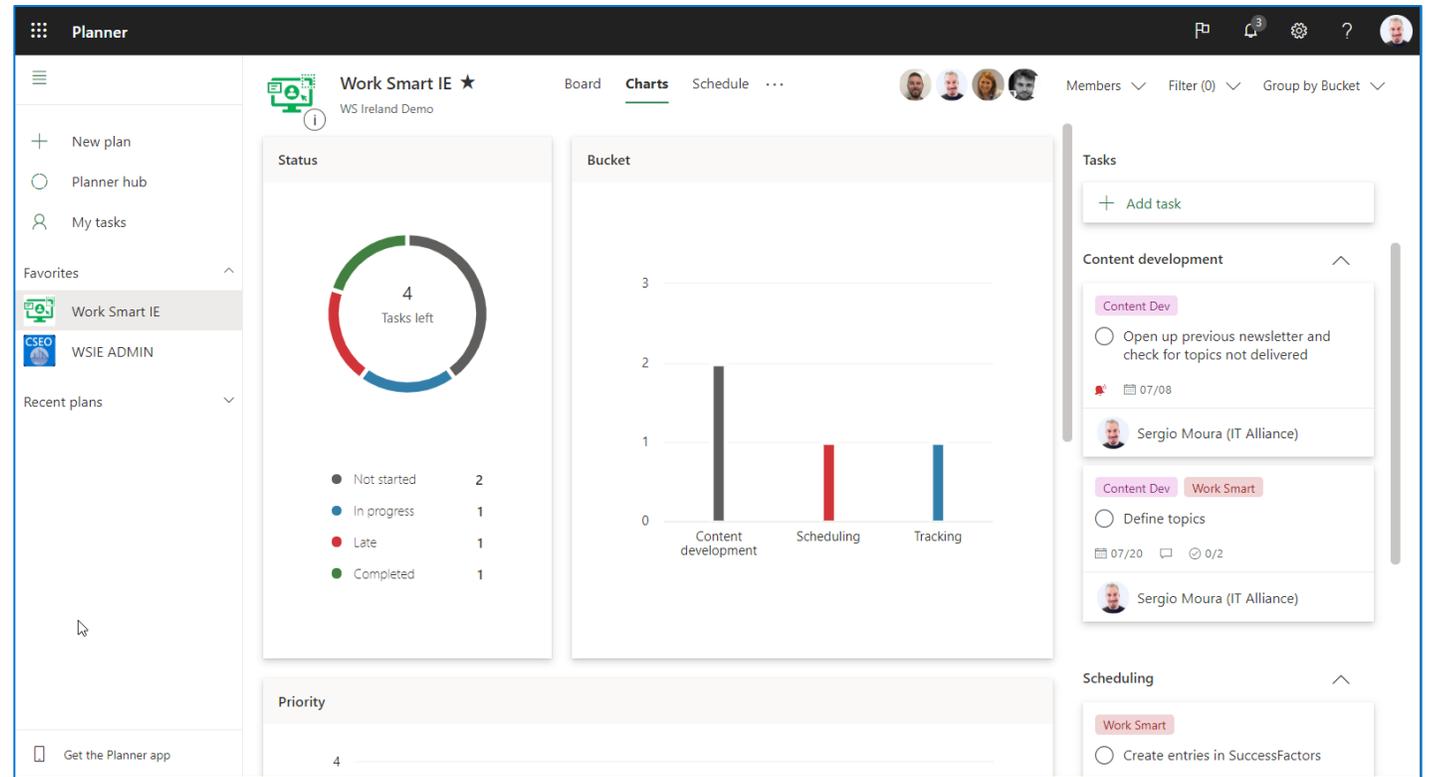


# Charts

The Charts area shows a summary / status report of your group plan

See where you are on all your tasks

Enforce accountability from a central view



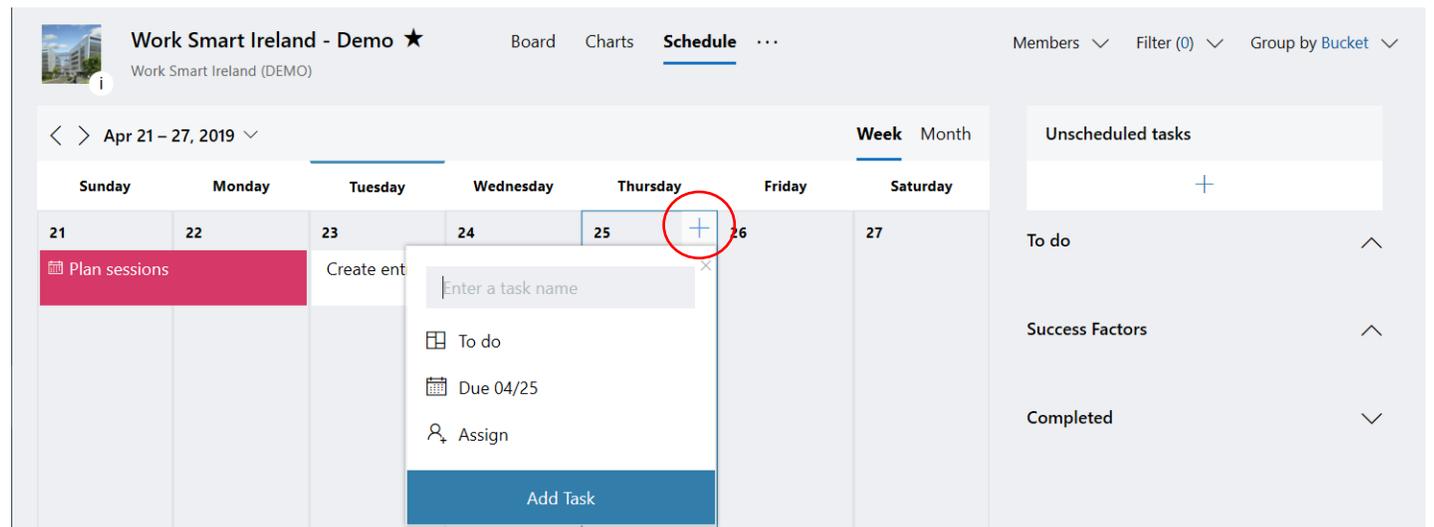
# Schedule

The Schedule shows a calendar view

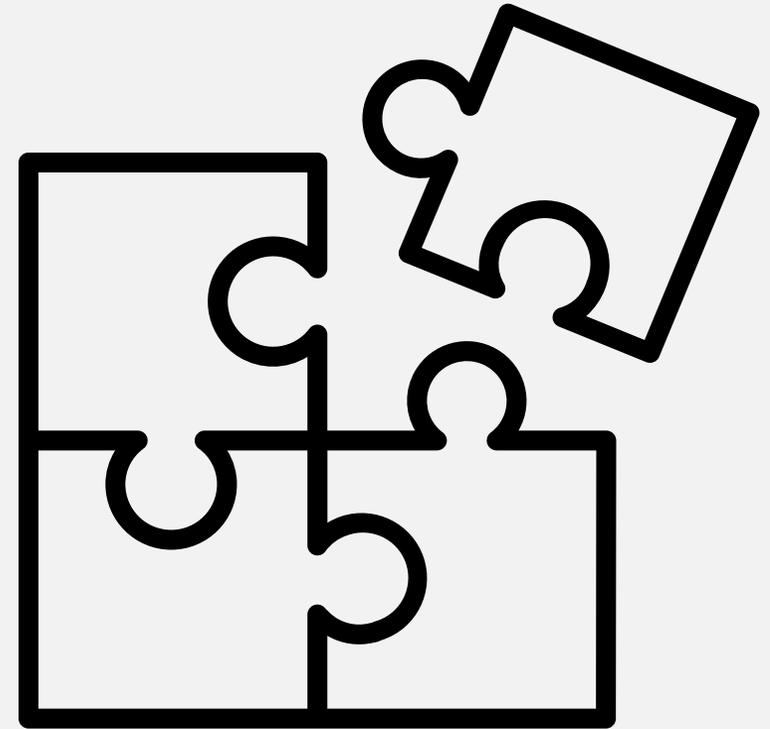
Filter based on bucket or member

Prioritize based on due dates

Easily add/assign tasks directly in the calendar view



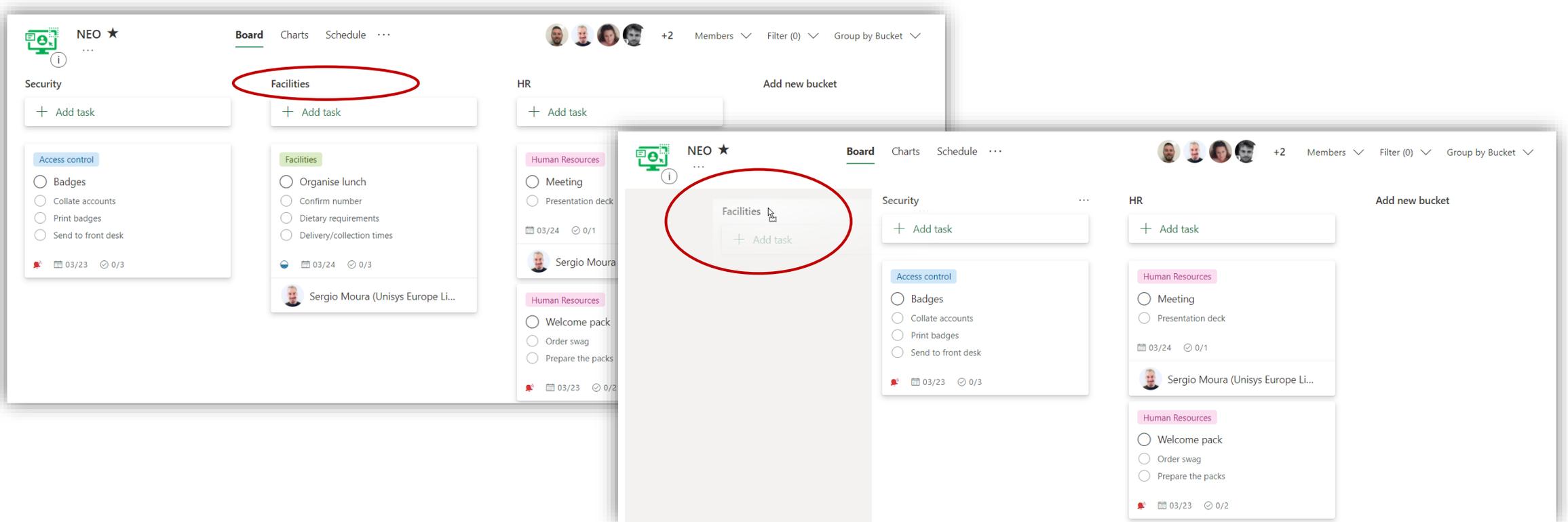
**Plan structure: buckets,  
tasks, checklists, labels**



# Buckets

Help you categorise your plan

Drag buckets across your plan to place them in the order you wish



# Task Details

Assign a member to keep people accountable

Add **Labels** to categorise your tasks

Select the **Progress** status;

Set the **Priority** level

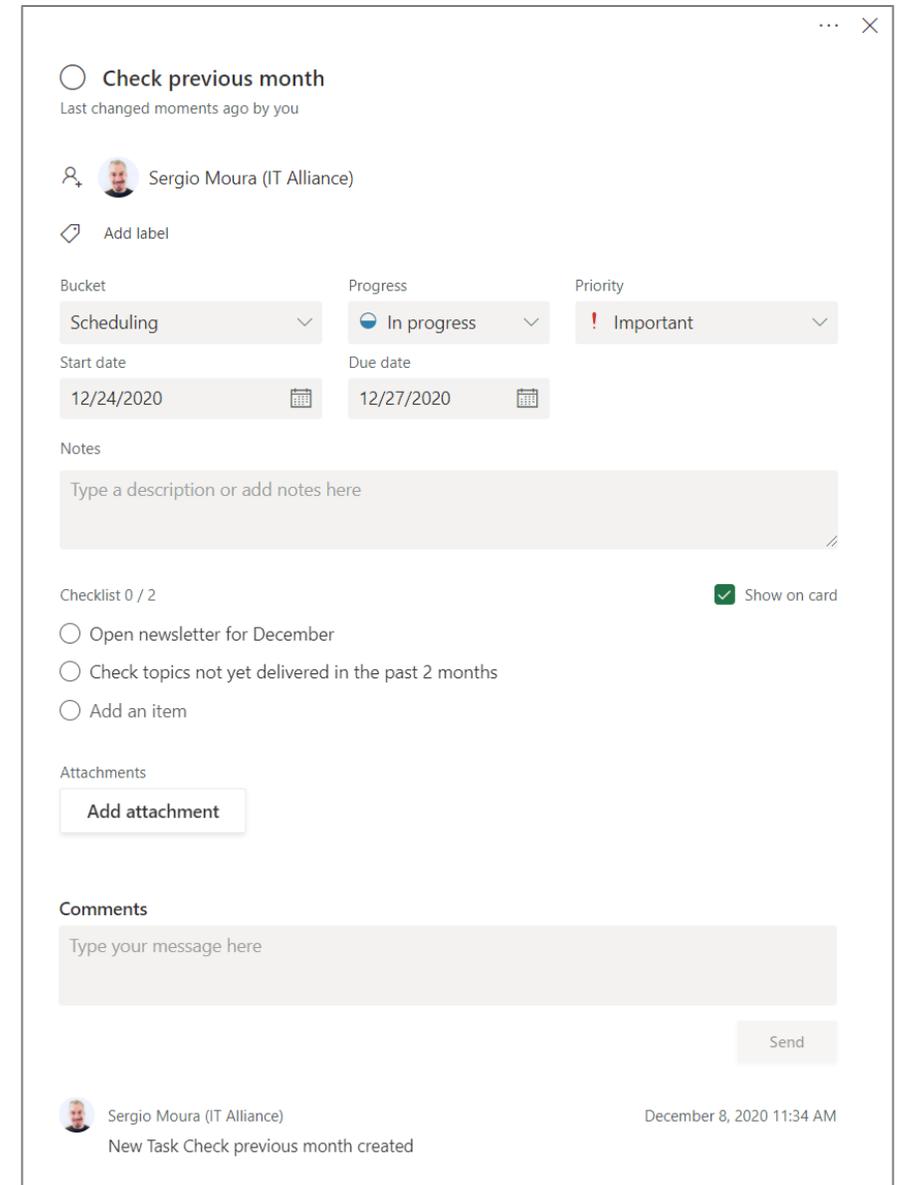
Set a **Start date**

Add **Notes**

Insert items to the task's **Checklist**

Include **Comments** to provide any updates

Add attachments if needed



The screenshot shows a task details form for a task titled "Check previous month". The form includes the following sections:

- Task Title:** Check previous month (Last changed moments ago by you)
- Assignee:** Sergio Moura (IT Alliance)
- Labels:** Add label
- Bucket:** Scheduling
- Progress:** In progress
- Priority:** Important
- Start date:** 12/24/2020
- Due date:** 12/27/2020
- Notes:** Type a description or add notes here
- Checklist:** Checklist 0 / 2. Items include: Open newsletter for December, Check topics not yet delivered in the past 2 months, Add an item. A "Show on card" checkbox is checked.
- Attachments:** Add attachment
- Comments:** Type your message here. A "Send" button is present.
- Footer:** Sergio Moura (IT Alliance) | December 8, 2020 11:34 AM | New Task Check previous month created

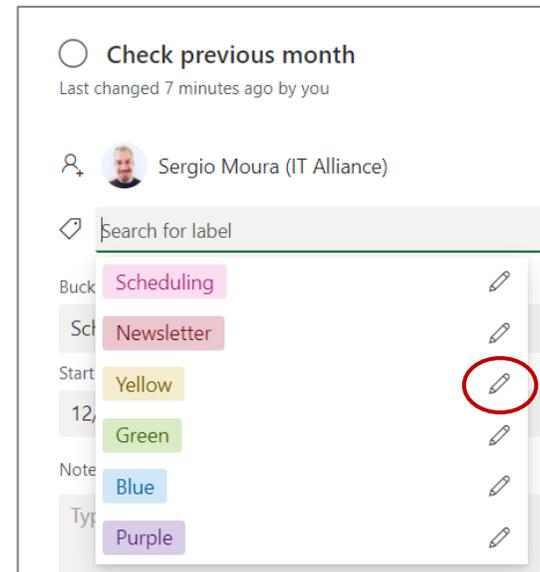
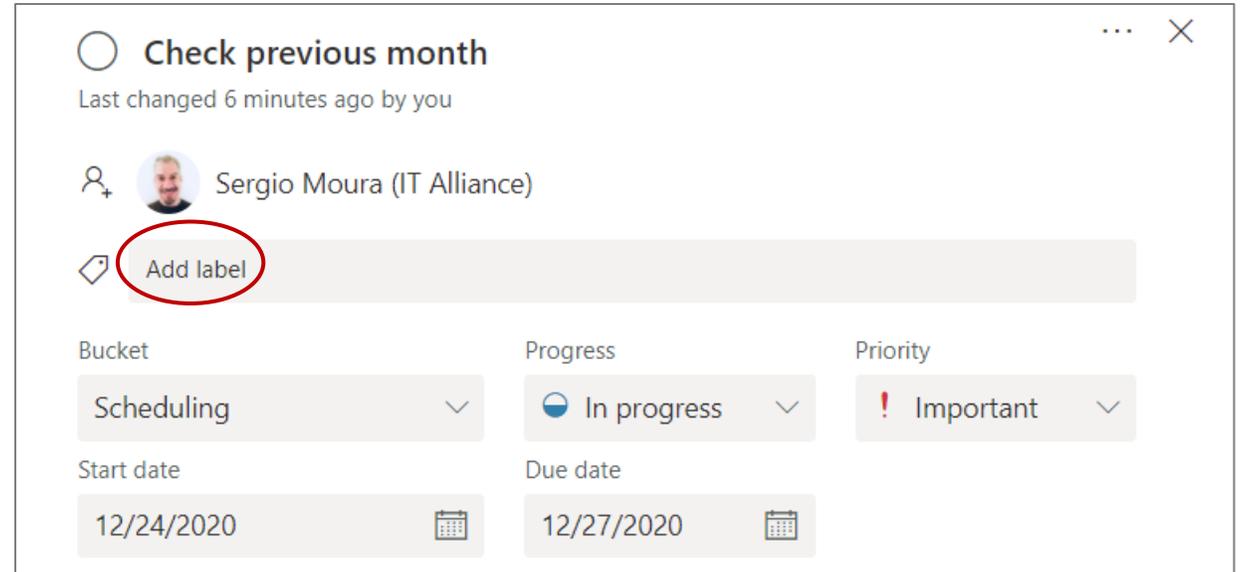
# Labels

Categorise tasks with labels

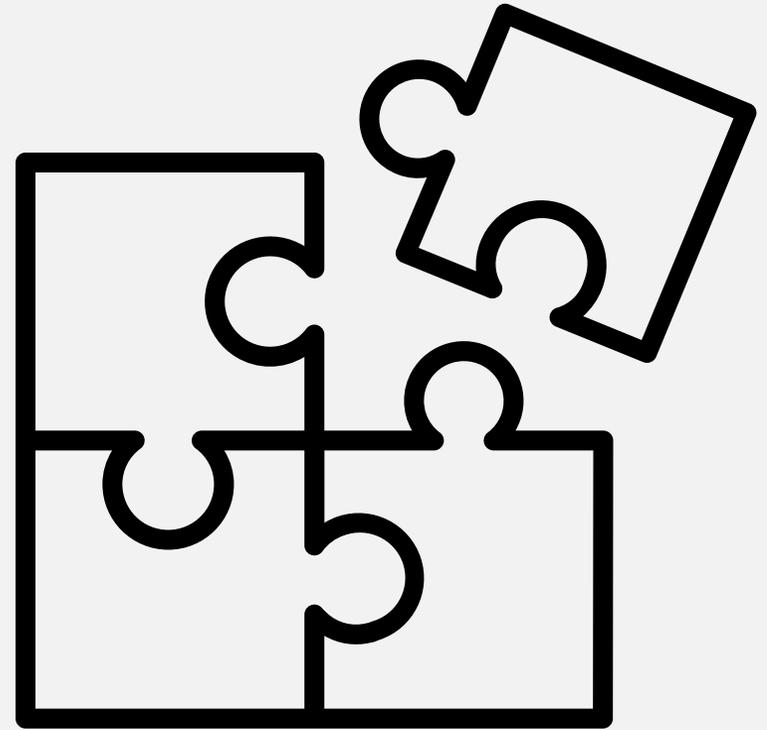
Edit by adding meaningful names

Assign multiple labels to a task

Allows sorting by different labels



**Plan settings and  
notifications**



# Plan Settings

Set a group notification;

Edit the plan name, the group (Team) settings or even delete a plan.

Note: The option **Leave plan** removes you from the Microsoft Team!

The screenshot illustrates the steps to access Plan settings in Microsoft Planner. The interface shows the 'Planner' app with a sidebar on the left containing options like 'New plan', 'Planner hub', 'My tasks', and 'Favorites'. The main area displays a plan named 'Initiatives'. A context menu is open over the 'Initiatives' plan, listing options such as 'Conversation', 'Members', 'Files', 'Notebook', 'Sites', 'Open in Microsoft Teams', 'Remove from favorites', 'Copy plan', 'Copy link to plan', 'Plan settings', 'Leave plan', and 'Add plan to Outlook calendar'. The 'Plan settings' option is highlighted with a red circle and the number 2. A red circle with the number 1 is placed over the three-dot menu icon. A red circle with the number 3 is placed over the 'Initiatives' text in the 'Plan settings' dialog. A red circle with the number 4 is placed over the 'Edit group' button in the 'Plan settings' dialog. A red circle with the number 5 is placed over the 'Edit group' button in the 'Edit group' dialog. The 'Edit group' dialog shows the group name 'Work Smart Ireland (DEMO)', a group description, privacy settings (Public and Private), and a classification dropdown set to 'Confidential'. There are 'Save' and 'Cancel' buttons at the bottom of the dialog.

# Setting up Notifications

In Planner, click the **Settings** icon and then click **Notifications**.

Select the desired notification option(s) to be informed of task assignments from Planner.

The screenshot displays the Microsoft Planner web interface. The browser address bar shows the URL: <https://tasks.office.com/microsoft.onmicrosoft.com/en-US/Home/Planner/#/mytasks>. The interface includes a left-hand navigation pane with options like 'New plan', 'Planner hub', 'My tasks', and 'Favorites'. The main area shows a task list under 'My tasks' with columns for 'Not started', 'In progress', and 'Completed'. A 'Settings' panel is open on the right, with 'Notifications' selected. A 'Notifications' dialog box is overlaid on the screen, containing the following text:

**Notifications**

Have Planner send me 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)

[Learn more](#)

Buttons: **Save** and **Cancel**

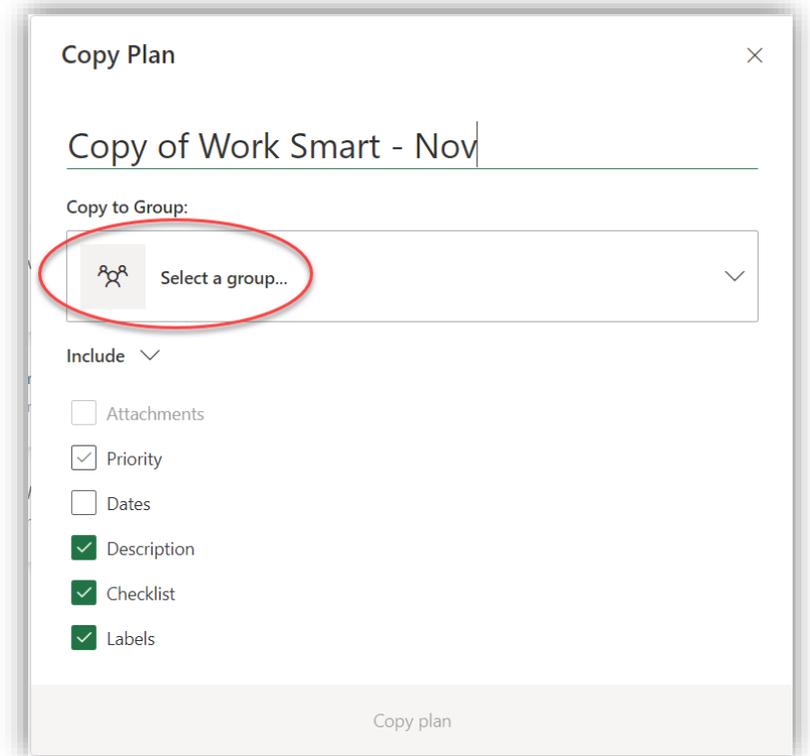
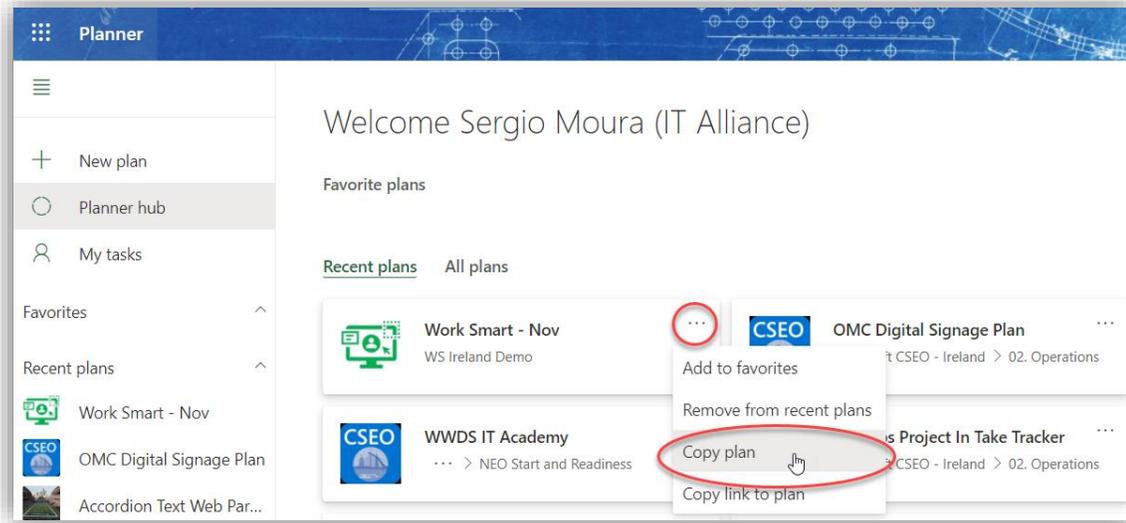
Red callout numbers 1 through 4 are placed on the image to indicate the sequence of steps: 1 points to the Settings gear icon, 2 points to the Notifications link in the Settings menu, 3 points to the notification options in the dialog box, and 4 points to the Save button.

# Setting a Plan as “template”

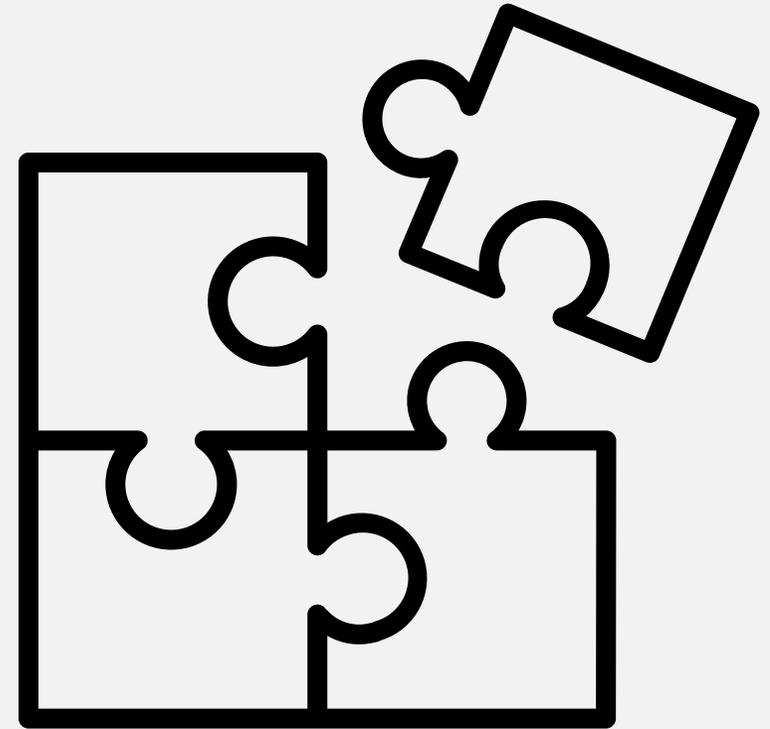
Although there are no actual templates in Planner, it is possible to make copies of any existing plan into other groups (Teams);

Create a “default” plan with tasks/checklists that you use frequently but without setting start dates or assigned users;

Copy that plan over and over, making the changes you need.



**Integration with other  
apps and feedback**

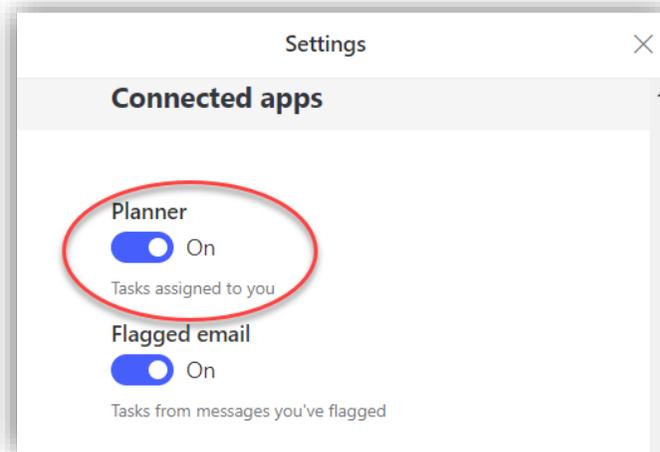
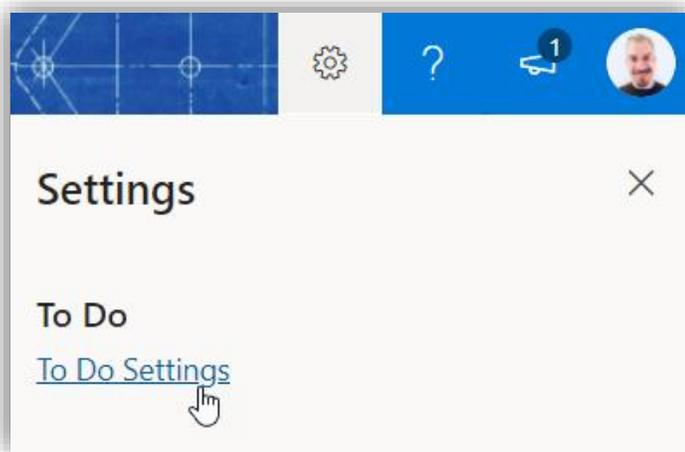


# Integration with Microsoft To do

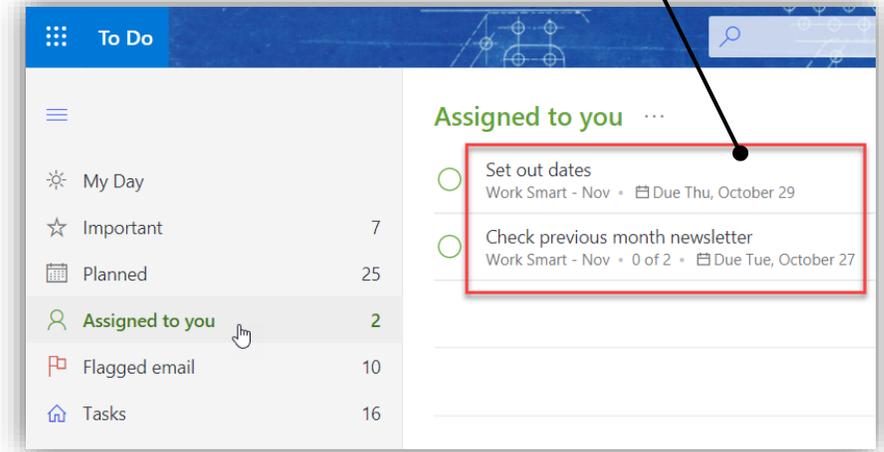
Go to Microsoft To Do on the web and click **To Do Settings**

In the **Settings** dialogue box, scroll down to **Connected apps** and make sure **Planner** is set to **On**

Any tasks assigned to you in Planner will then become visible in Microsoft To Do

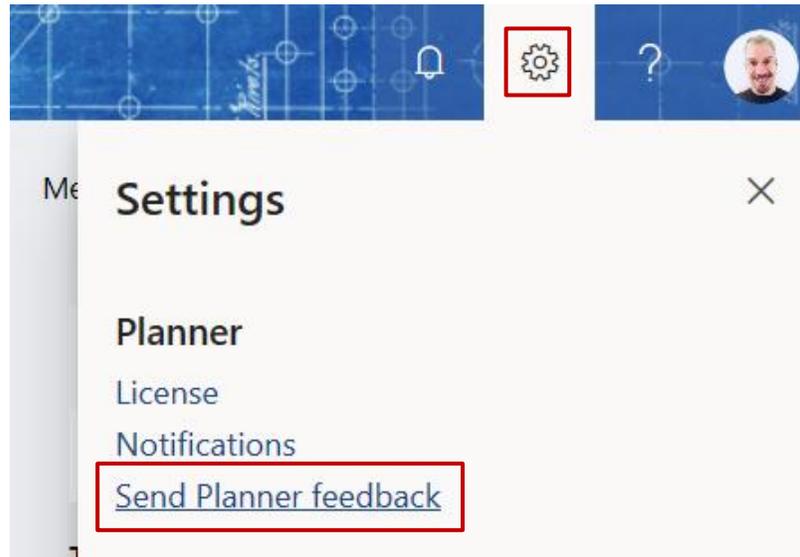


Tasks from Microsoft Planner



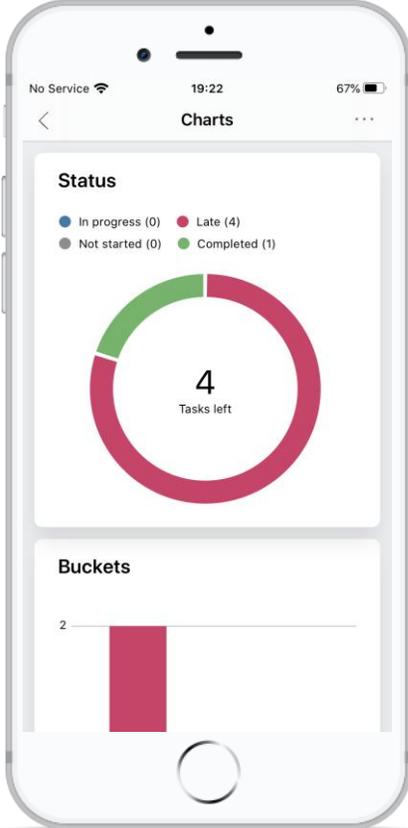
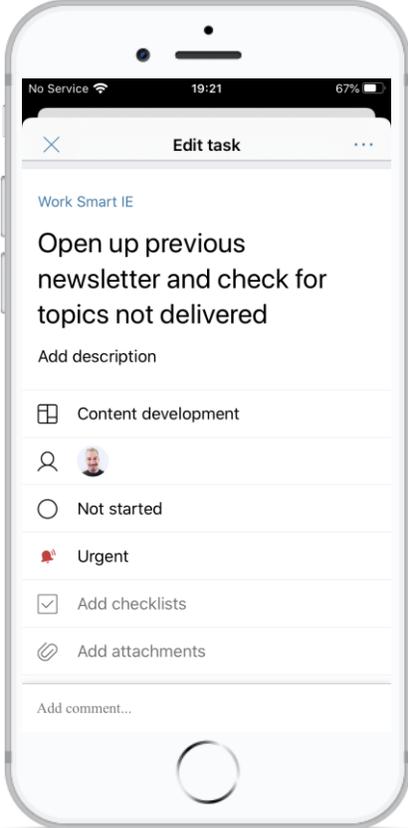
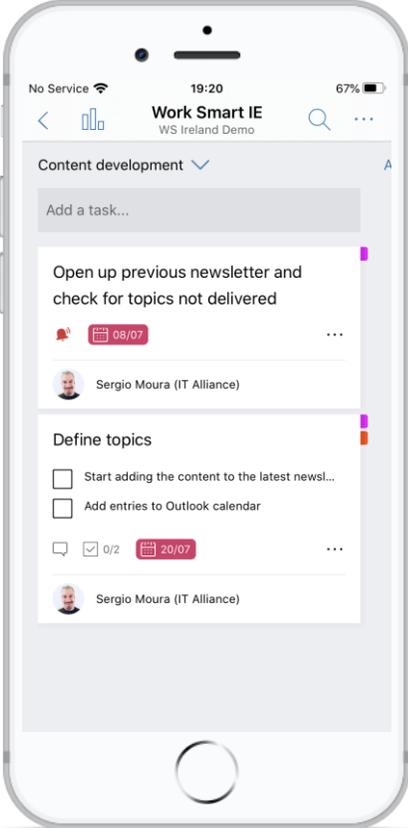
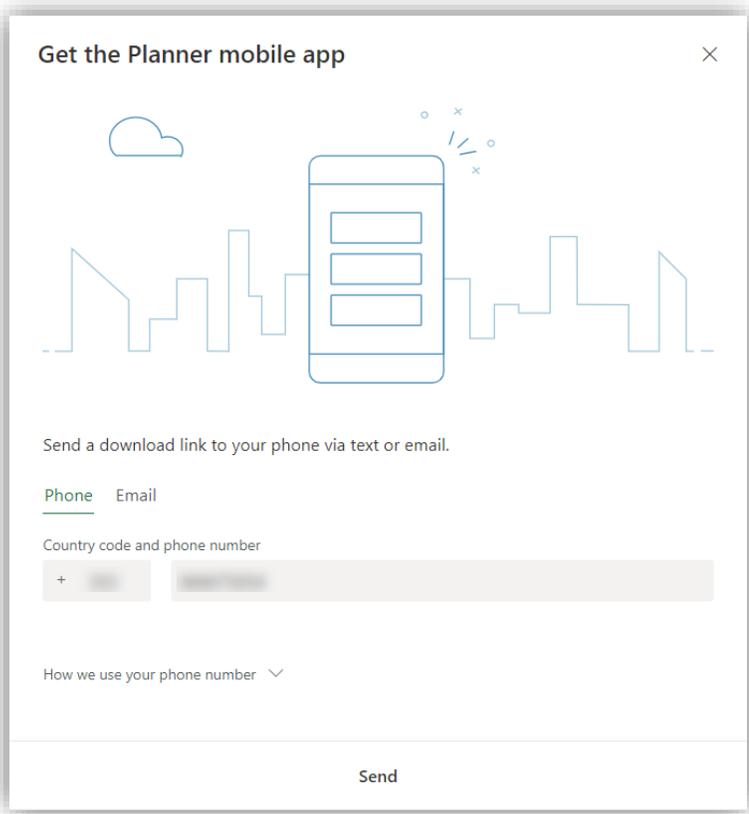
# Send Feedback

To suggest a feature or send your ideas, on the top right corner of the Planner window, click the **Settings** icon then select **Send Planner Feedback**.

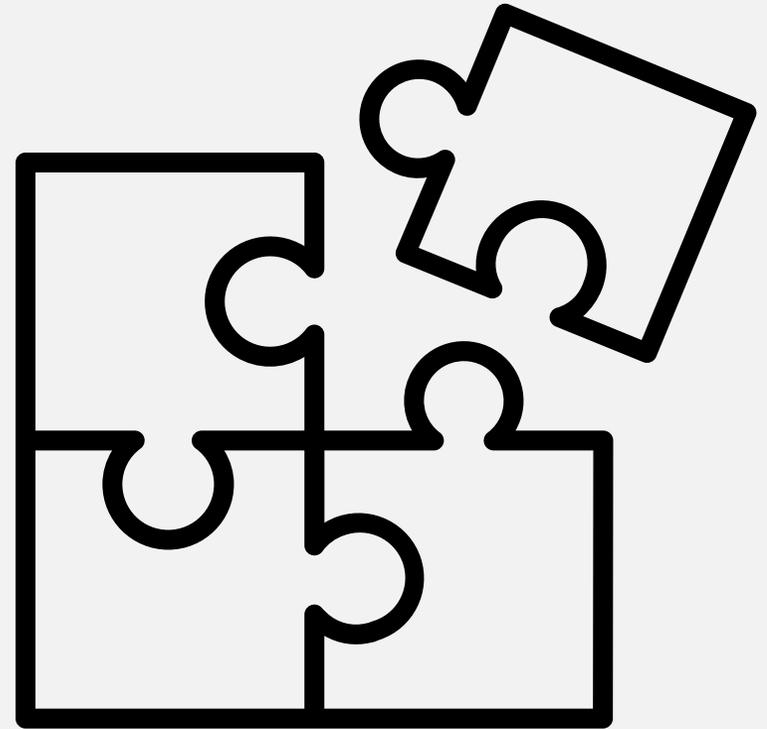


# Get the Mobile App

Check out plan progress and stay accountable while mobile



**Additional resources**



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## Further learning links

[Microsoft Planner help & learning portal](#)

[Microsoft Planner video training - Office Support](#)

[Use Planner in Microsoft Teams - Office 365](#)

[Microsoft Community](#)

