Microsoft Planner

September 12, 2023

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Microsoft (MS) Planner

MS Planner is a web planning app used to visually assist teams on managing and tracking progress on simple projects (plans). Planner assigns tasks, shares information, and collaborates with the plan's members.

Why use MS Planner

- ✓ At RPI, MS Planner is part of the Office 365 group and is free to all Students, Faculty, and Staff **with an active RCS account**.
- ✓ Planner integrates with other Office 365 apps such as Outlook, Teams, OneDrive, SharePoint
- ✓ Email notifications are sent to help the team members keep track of their tasks.
- ✓ The Mobile app can be downloaded to stay connected when on the go.

NOTE: Planner does not include Gantt charts, track dependencies, use subprojects or forecast the completion date like Microsoft Project. Project is used for larger more detailed projects. **MS Planner is <u>free</u> and part of the Office 365 suite**. You can import your plans from Planner into MS Project.

Example of what a **simple project plan** may include:

- Project name, summary, and objective.
- Define the team members who will drive the project, along with their roles and responsibilities.
- What are the key outcomes and due dates.
- Project elements, that may not be in the scope categories.
- Milestones, milestone owners, and a project end date.
- Reference material or Training relevant to the project.

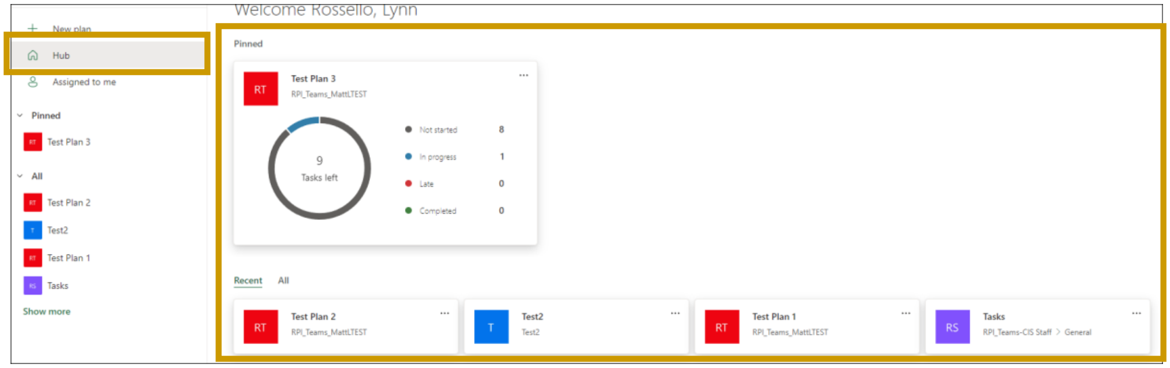
Getting Started – Logging in

NOTE: <u>Before starting a new plan</u>, you will need to **submit a request to the help desk so they can create your team**. Please include in the request the **name of the team members** and who will be the **Administrator (probably yourself) of this group**.

1. Type **portal.office.com –** You may have to login with your RPI email and RCS password.
2. In the top search bar type **Planner**.
3. Click the **Planner** app icon Planner.

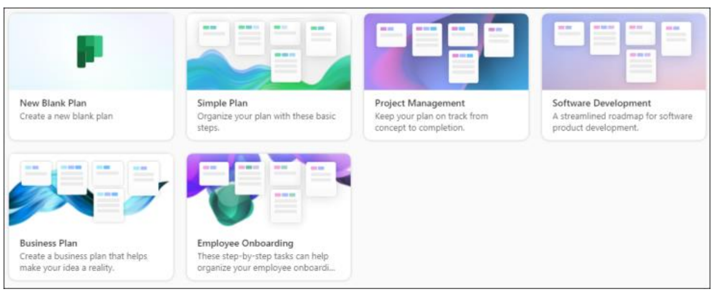
Planner Hub view and Create/Delete a Plan

The Planner **Hub** view opens showing the Plans that were previously created as well as any pinned plans at the top.



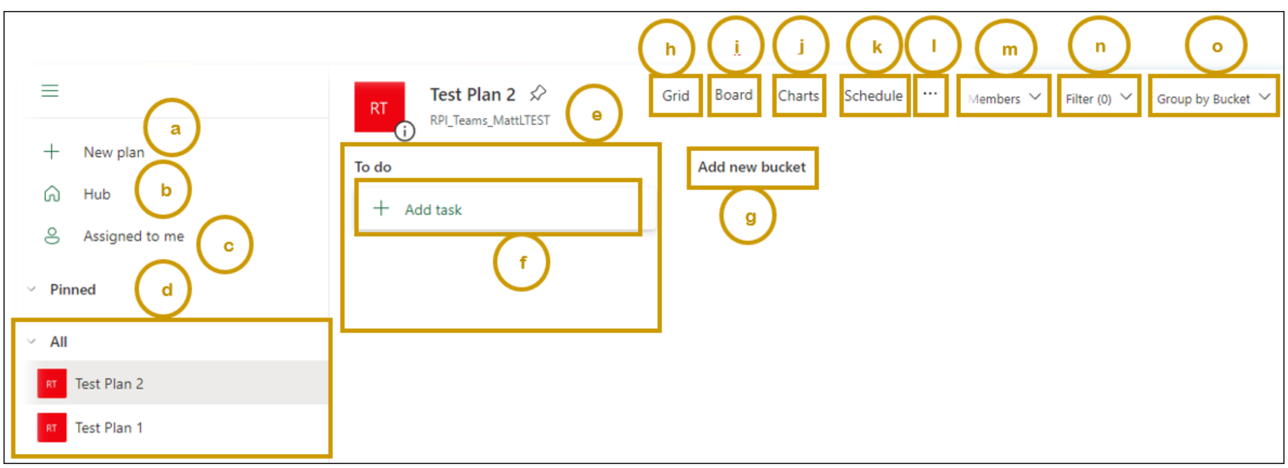
Create a New Plan

1. Click **+ New plan** located in the upper corner of the Planner window.
2. Choose a **New Blank Plan** or one of the **pre-defined templates**.



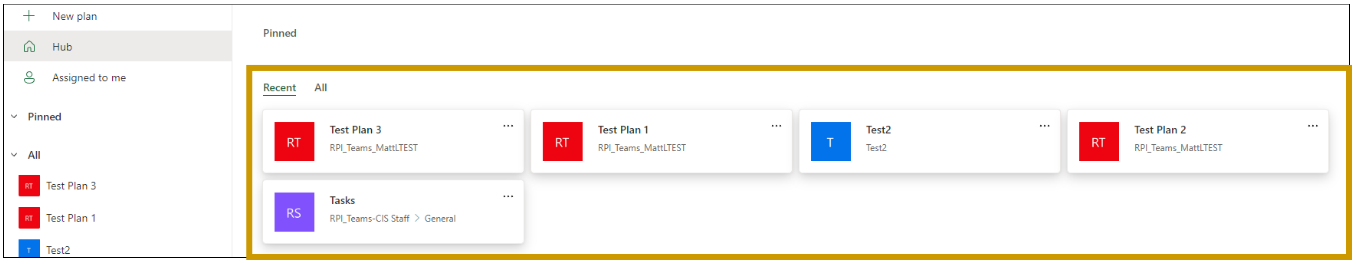
3. Enter a **Plan title** and then choose **Add an existing group** (optional) for the plan.
4. Click **Create**.

A **New Plan layout** appears.



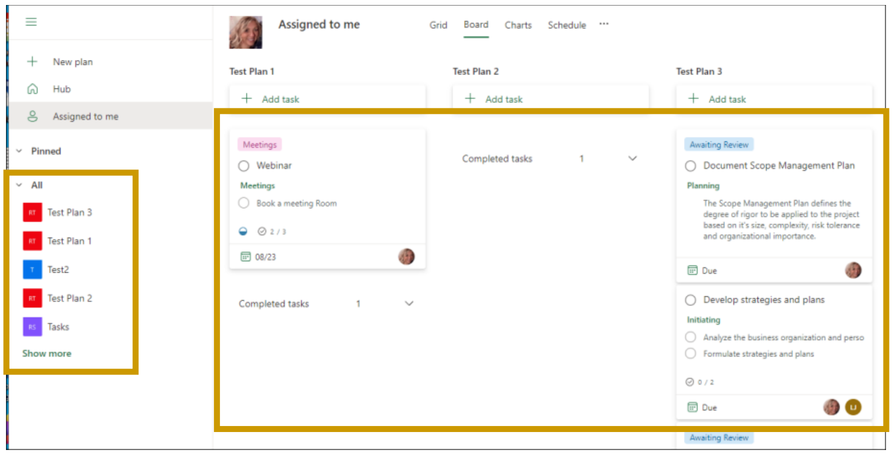
a. **New plan** – Starts a new plan.

b. **Hub** – A page that views all of your plans.



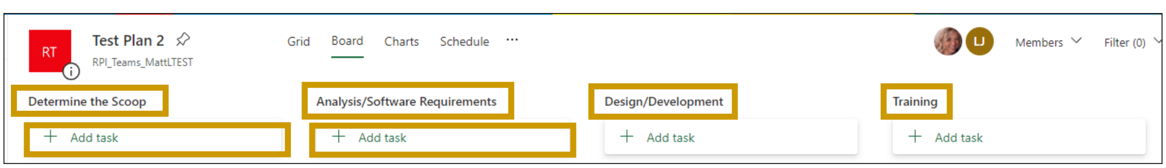
c. **Assigned to me** – Shows tasks assigned to you.

d. **All** – Displays a list of plans that you have recently viewed.

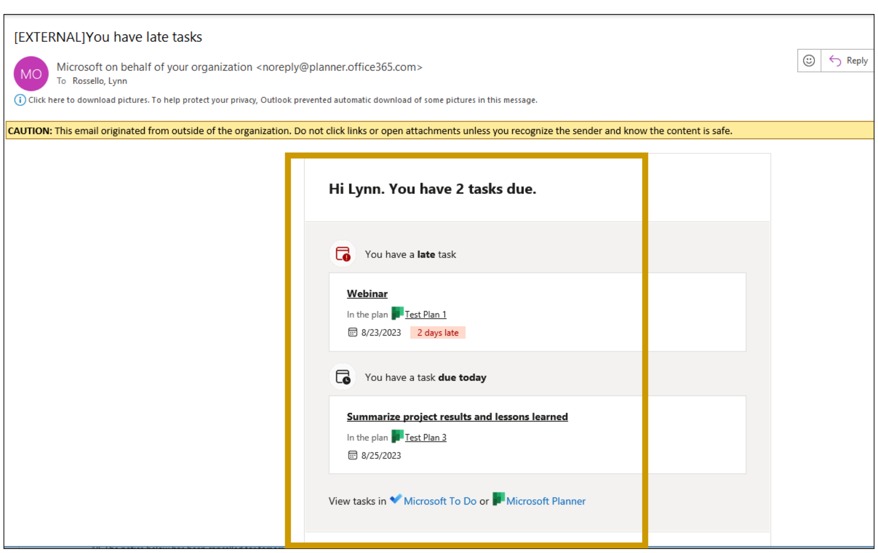


e. **Buckets** – View and create buckets, i.e. workstreams, project phases or topics. Buckets allow you to group and organize related tasks. **Examples of buckets can be:** *Determine the scope, Analysis/software, Design, Development, Training*.

f. **Add Tasks** – Create a new task, assign a task and add a due date for a task.

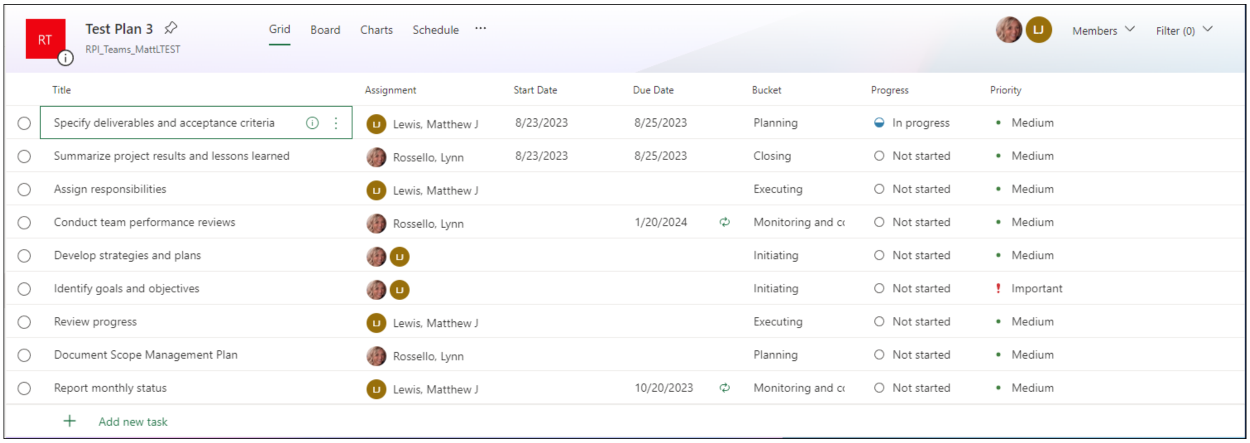


Example of an Email notification letting you know you have late task(s) on a project.

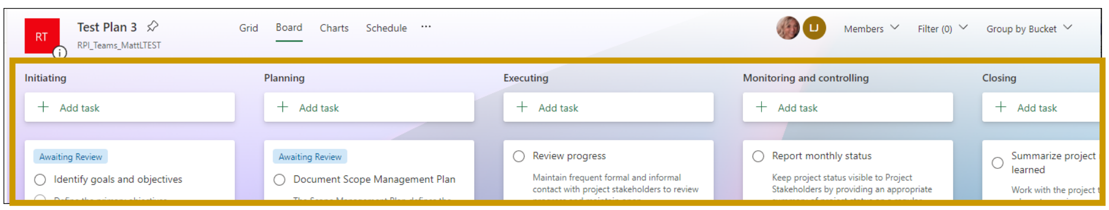


g. **Add new bucket** – Create a new bucket for your plan. Click the **Add new bucket** option located to the right of the bucket name line.

h. **Grid** – Shows your tasks in a convenient list using a grid where assignments, bucket, dates and other settings can changed by clicking to the right of each task field.



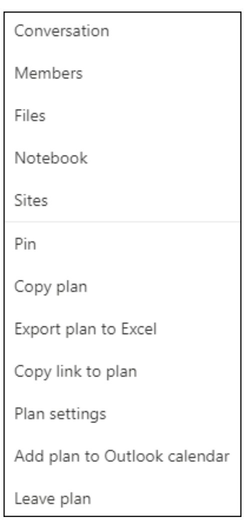
i. **Board** – Default view for Planner. Where you can view plan buckets, filter tasks or changed how tasks are grouped.



j. **Charts** – View the plan in a chart format.

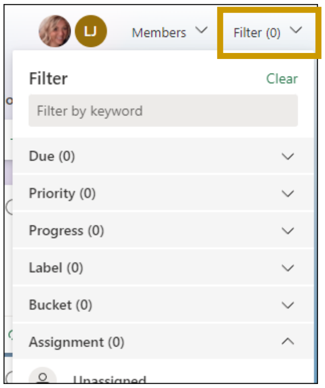
k. **Schedule** – View the plan in a calendar format.

l. **More options** – Shows additional options and plan settings. **NOTE**: The Notebook option opens OneNote.

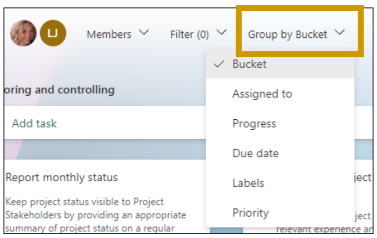


m. **Members** – View and add members to the plan.

n. **Filter** – Filter the plan by due date, assignment, bucket, etc.

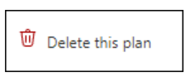


o. **Group by Bucket** – Group by Assigned to, Progress, Due Date, Labels, and Priority



chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://apps.kennesaw.edu/files/pr_app_uni_cdoc/doc/Microsoft_Planner_Guide.pdf

Delete a Plan

1. Open the plan that you want to delete.
2. Click the more options, three dots to the far right of the Plan name and choose **Plan settings**.
3. Click Delete this plan  located at the bottom left of the Plan settings view.

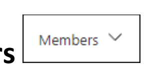
The Delete plan dialog box appears letting you know that the plan and tasks will be permanently deleted.

4. Choose **Delete**.

Add/Remove Members to the Plan

It is important to add the plan member before adding tasks to a plan.

Add a new member to the plan

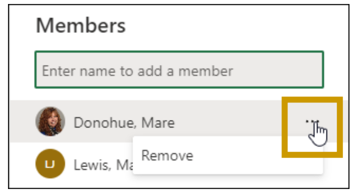
1. Open a plan and then click the drop-down arrow to the right of **Members**  located in the upper right corner.

2. Begin typing the name of the person you want to add and then choose them from the list below.

Their name now appears in the members list.

Remove a member from a plan

1. Click the drop-down arrow to the right of **Members** located in the upper right corner.
2. Locate and click the **three dots ". . ."** to the right of the members name you want to remove and click **Remove**.



The member has been removed from the list.

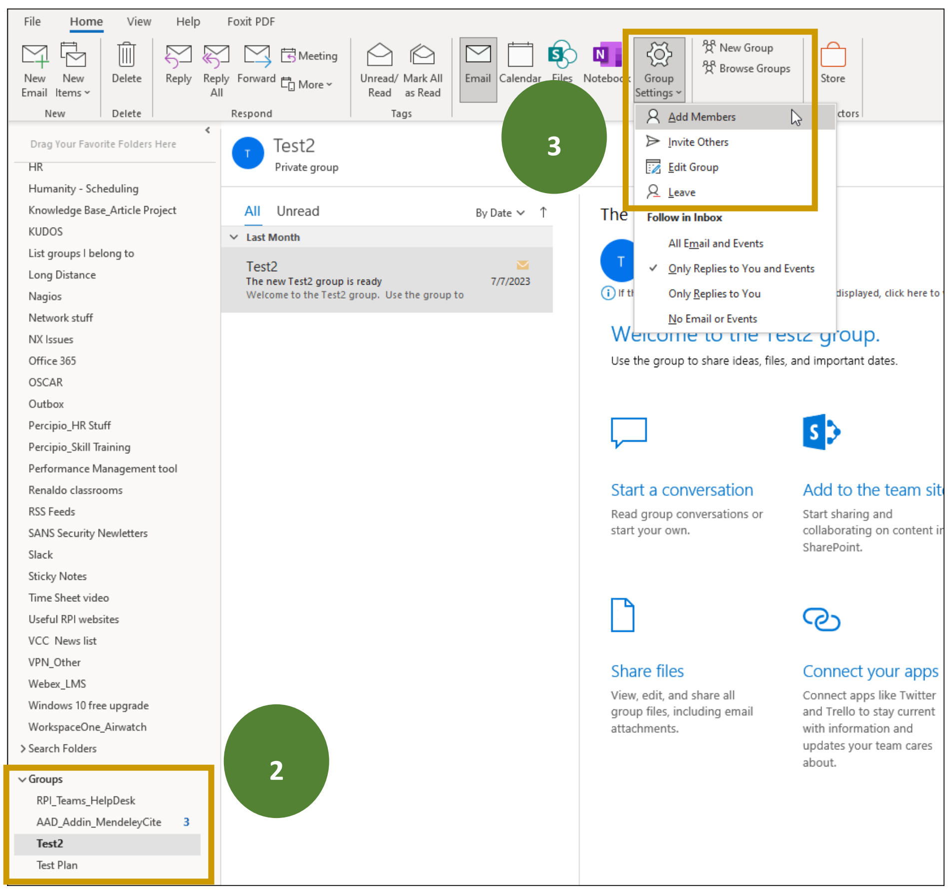
3. **Repeat steps 1 and 2** to remove other members.

Adding Guests to a group

When adding external people to a group they will be granted access to all information within the group. This includes emails, calendar, project notes, project files, and project plans. They will not see Groups in their navigation pane in Outlook, but they will receive group emails and links to files in their inbox.

To add guests to a group

1. Open Outlook for Windows.
2. Under **Groups** in the left folder pane, select your group (plan).

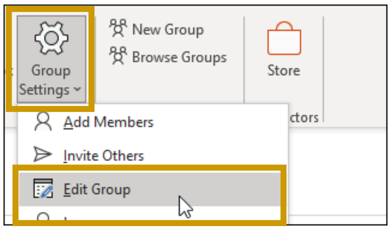


3. On the Groups ribbon, select **Add Members**.
4. In the **Add Members** box, enter the email address of the guest and press **Enter**.
5. Select **OK**.

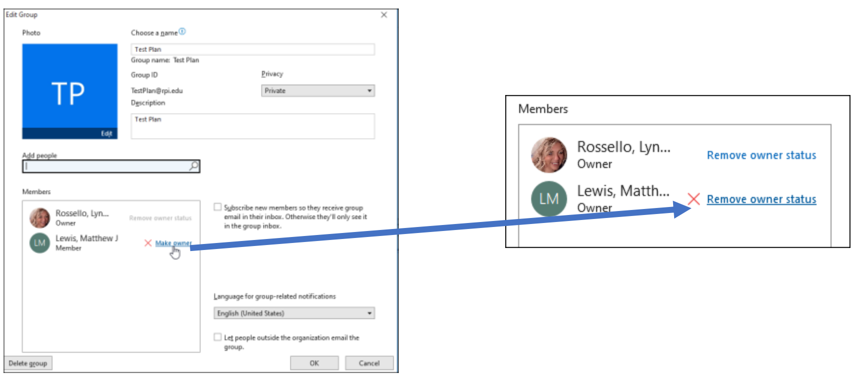
Adding another person as an owner of a plan

You are the owner of any plan you create; however, you can make another person the owner by editing the membership within Groups in Outlook.

1. While in **Outlook**, slide down to the bottom of your folders from the left navigation bar and click **Groups** to view all the groups you are an owner/member of.
2. Choose **Group settings** > **Edit Group** from the ribbon at the top.



Add the person you would like to be an owner, or if this person is already in the members list, choose **Make owner**. The selection to the right of this plan member's name **changes to Remove owner status**. NOTE: Click X **Remove owner status** to remove them as an owner.



3. Click **OK**.

Creating Buckets and Tasks

Bucket types can be thought of as types of sections, columns, or categories where tasks are added to keep you organized. It is best to create multiple buckets if you have a very long list of tasks to represent different phases or stages of a project. Some Bucket names can include Scope, Progress, Develop Content, Priority, or Training. **NOTE**: You can have up to 200 buckets per plan and 9000 tasks.
https://learn.microsoft.com/en-us/office365/planner/planner-limits

Buckets

If your team works on multiple projects, set up one bucket for each project.

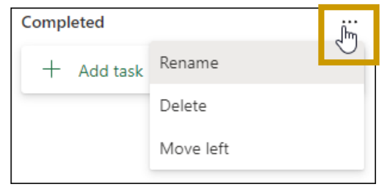
Visit this site for best practices on how to create buckets. - https://climbtheladder.com/10-microsoft-planner-buckets-best-practices/

Creating a new bucket

1. With a Plan opened, by default a bucket "To do" has already been created as the first bucket. Click **Add new bucket** located in the top.

2. Type a **Bucket name** and then press **Enter**.

Bucket - More Options



1. Click the **three dots . . .** (more options) located to the right of the bucket name.
2. Choose **Rename**, **Delete**, or **Move left**. **NOTE**: Follow these steps to change the *To Do* default bucket.

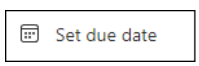
Tasks

Tasks are the individual items your team needs to finish to make progress on a plan. Each bucket allows you to create and assign members to new tasks. The Task screen allows you to add due dates, progress, priority, notes, comments, etc.

Creating Tasks within a Bucket

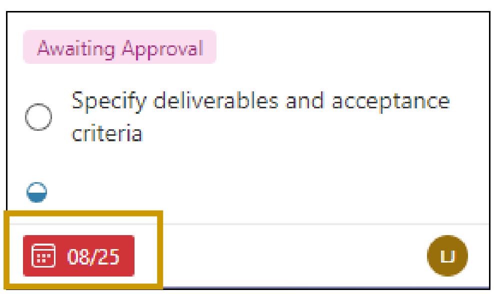
1. With a plan open, click **+ Add task** button.
2. **Type** the **name** of the task.

Setting a Due Date for a task

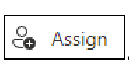
1. Click **Set due date** 

.
2. **Choose a date** from the calendar below.

NOTE: Due Dates are shown in Red if the task is overdue.



Assigning a Task

1. Click **Assign** 

.
2. **Type the name or email address of the member** or **scroll through the list** below to assign this member to the task.

Changing Assignments

One of the quickest ways to re-assign a task to another plan member is under the **Board** tab.

1. While under the **Board** tab, click the **Group by…** located in the upper right corner and change this to Assign to (changes to Group by Assigned to).
2. **Click and drag the task** to the plan members column.

This task has now been assigned to that new member of the plans task list.

Rearranging Tasks

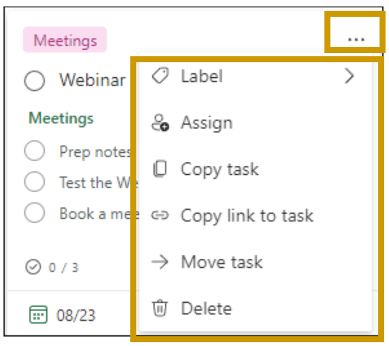
Tasks can easily be re-arranged within a bucket or moved to a new bucket.

1. Click and **drag the task** to the desired position within a bucket or to a new bucket.

Task – More Options

Each task has more options to choose from.

1. Click the **three dots . . .** in the upper right corner of the task window.
2. Choose one of the options.



Copy Link to task – Shares a link to a single task with other team members.

Adding more Task Details

There are additional details such as start date, description, comments, attachments, etc. that can be added to each task.

1. Click once on a task and the Task Details view opens.

   a. **Assign** – View and add members to this task.

   b. **Bucket** – Select a different bucket for the task.

   c. **Progress** – Set to Not started, In progress or Completed.

   d. **Priority** – Choose Low, Urgent, Important, or Medium

   e. **Start date** – Set a start date for the task.

   f. **Due date** – Set the due date for the task.

g. **Repeat** – Use repeat if this task will happen multiple times throughout the project's life cycle can benefit from being set as a recurring task. ***Examples***: Daily, Weekdays, Weekly, Monthly, Yearly, Custom

NOTE: **Recurrence rules:** https://support.microsoft.com/en-gb/office/recurring-tasks-in-planner-9f2561ee-45ee-4834-955b-c457f8bb0490

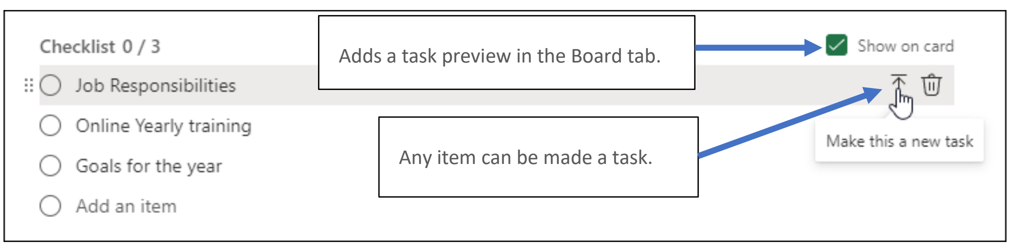
1. Repeat will be based on the initial task's due date timing. If the initial task has a start date set, but no due date, recurrence will be based on the start date. Otherwise, the repeat is based on the current date.
2. The next instance in the recurring series is created only after the preceding instance has been marked as complete.
3. Repeat will be based on the initial task's due date timing. If the initial task has a start date set, but no due date, recurrence will be based on the start date. Otherwise, the repeat is based on the current date.
4. Removing the due date on a task removes the recurrence and the series is discontinued.

h. **Notes** – One of the many ways to communicate. Type any notes regarding the task.

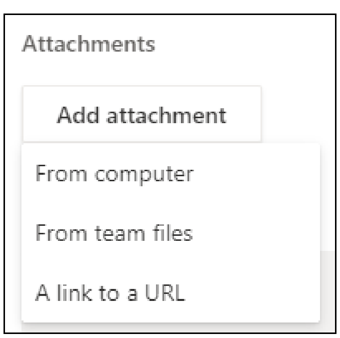
i. **Checklist** – Add checklist items associated with the task – Best Practice for Planner

To add a checklist in a task:

1. Open or start a new task.
2. Click **Add an item** and **type the name** of the first item.
3. Press **Enter**.
4. **Repeat steps 2 and 3** until the item list is complete.

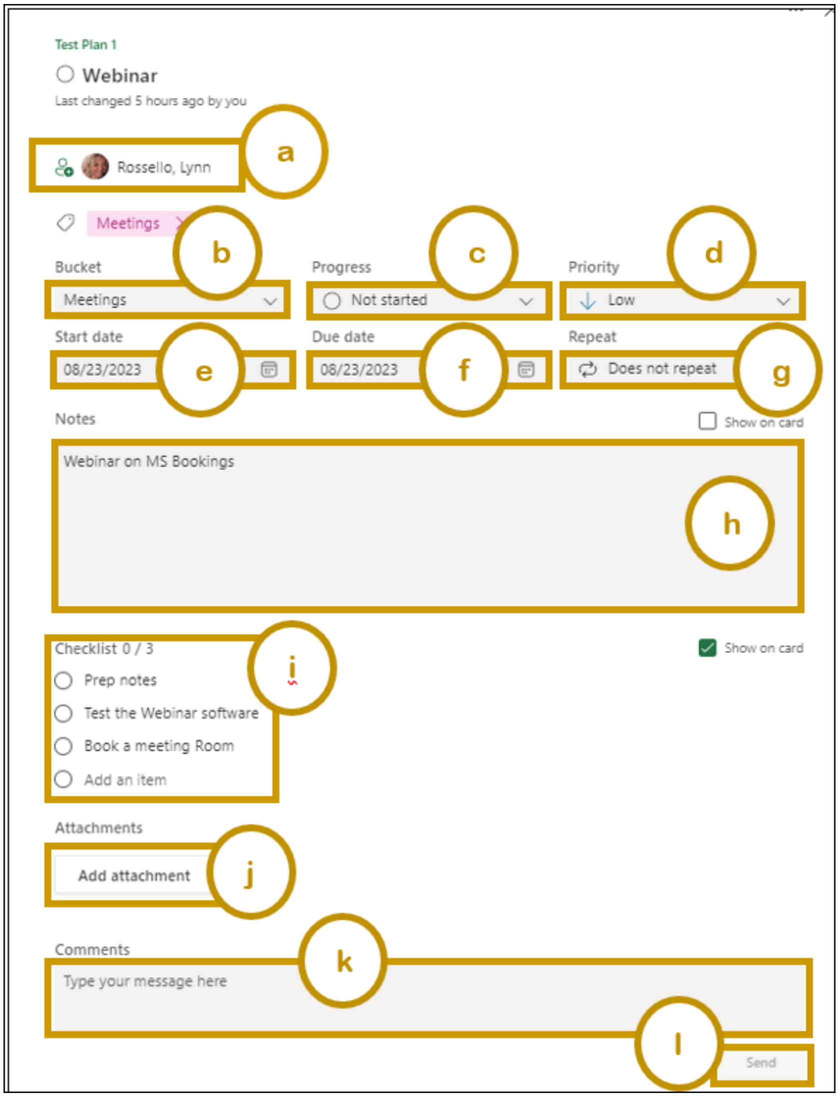


j. **Add attachment** – Add files, photos, or links to the task.



k. **Comments** – Another way to communicate. Enter additional comments about the task.

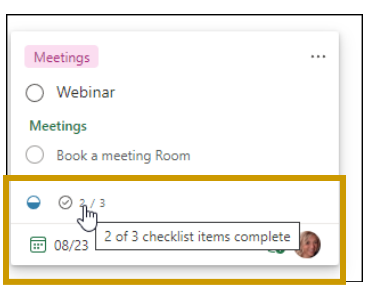
l. **Send** – Save



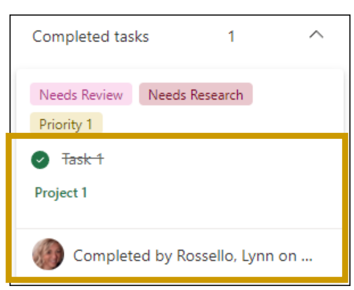
Completing Tasks

To track the progress of a task, it is important to make sure the status is always up to date. Once a task is finished, it should be marked as completed. The **Assigned to me** option on the left navigation pane shows an overview of all the tasks organized by progress.

Example of a task **In Progress**.

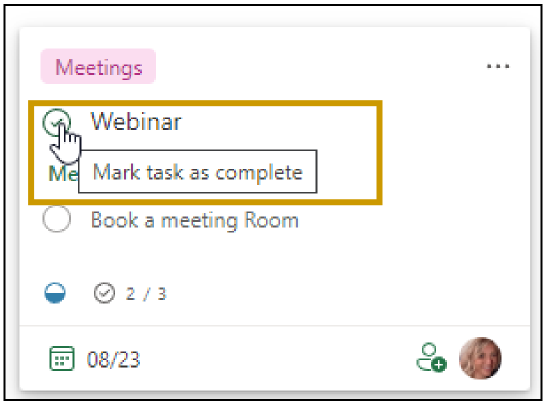


Example of a **Completed** task.

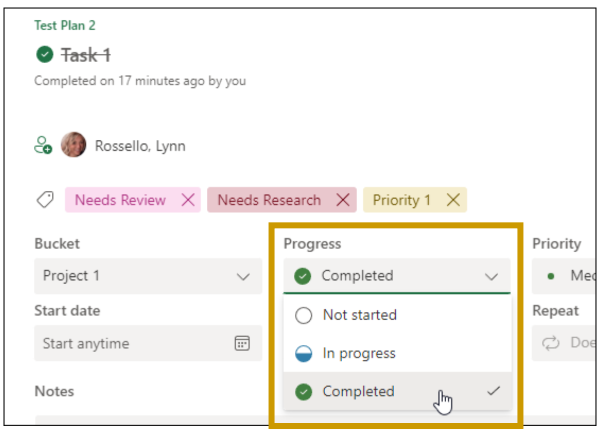


There are a couple of ways a task can be marked as Complete:

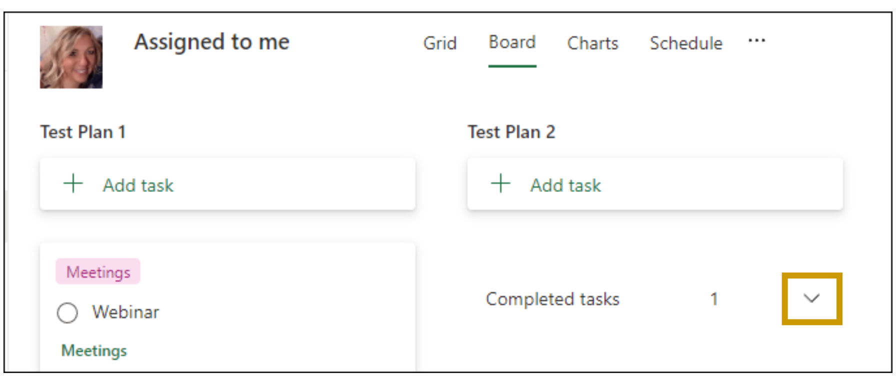
1. The first way is from the Board screen, click the **circle** to the left of the task name to mark complete and then this task moves to the completed bucket.



2. The second way is to click the task name and change the status to **Completed**.



NOTE: Completed tasks get collapsed down to make them less noticeable when working in your plan.

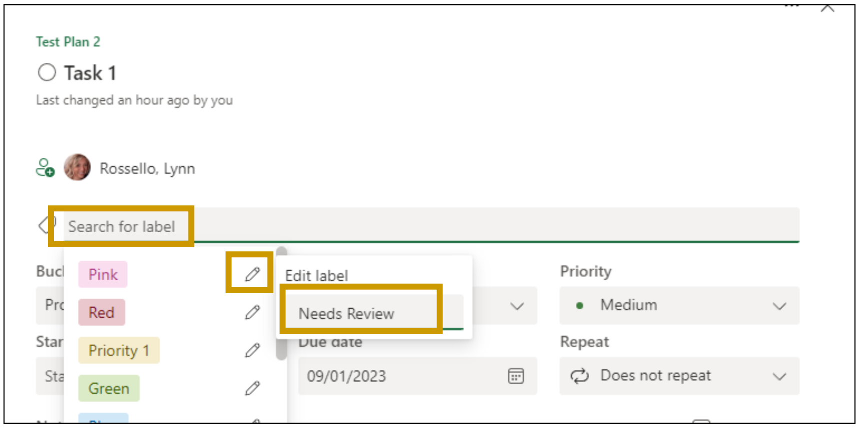


Adding and Changing a Label name

Labels are used to organize and identify tasks quickly. Some examples of labels could be, "*Needs review*" or "*Research needed*". MS Planner has **25 labels that can be edited** to whatever text you want.

1. With a task opened, click in the **Search for label** line and either **choose a color** or click the **pencil to edit the text**.

2. Once you **type the text**, click **Edit label** above and the label changes to the new text.

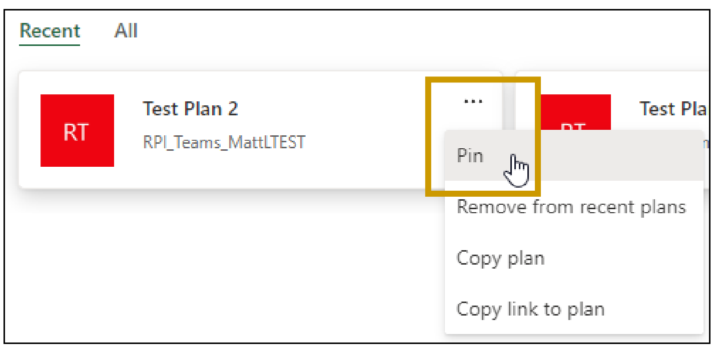


Organizing Plans

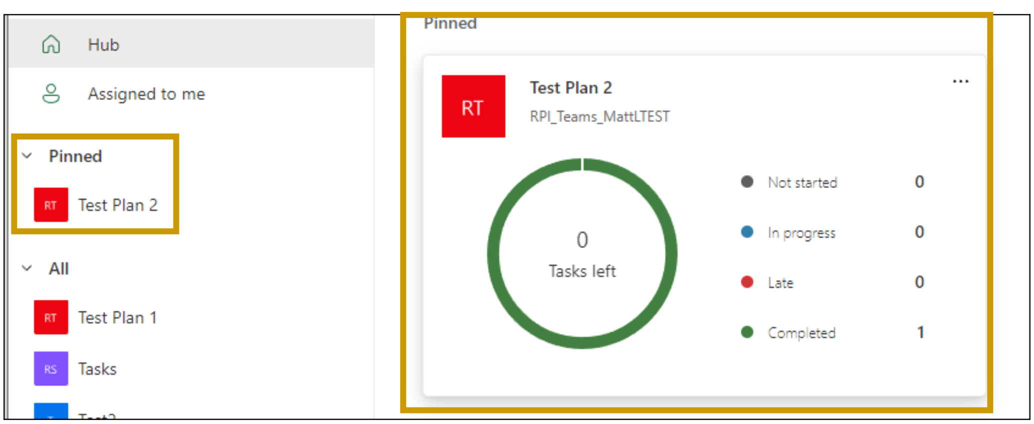
You can easily organize your plans by adding them to the left navigation bar or by pinning them to the top of the Hub view.

Pin a plan to the navigation bar and on the hub view

1. Click **Hub** from the left navigation bar.
2. Click the three dots **...** in the upper right corner of the plan you want to add and choose **Pin**.



This plan now appears on the left navigation bar under **Pinned** and at the top of the **Hub** view.



Tracking progress and Schedule

From the main planner window, you can click the **Charts** tab at the top to view a few charts in MS planner. It is very important for members to update the status of their tasks, so this information is accurate to assess if the plan is on track or not. **NOTE**: Keep in mind that Planner is used for small projects and therefore these charts do not track dependencies and subprojects like Gantt charts.

Charts tab

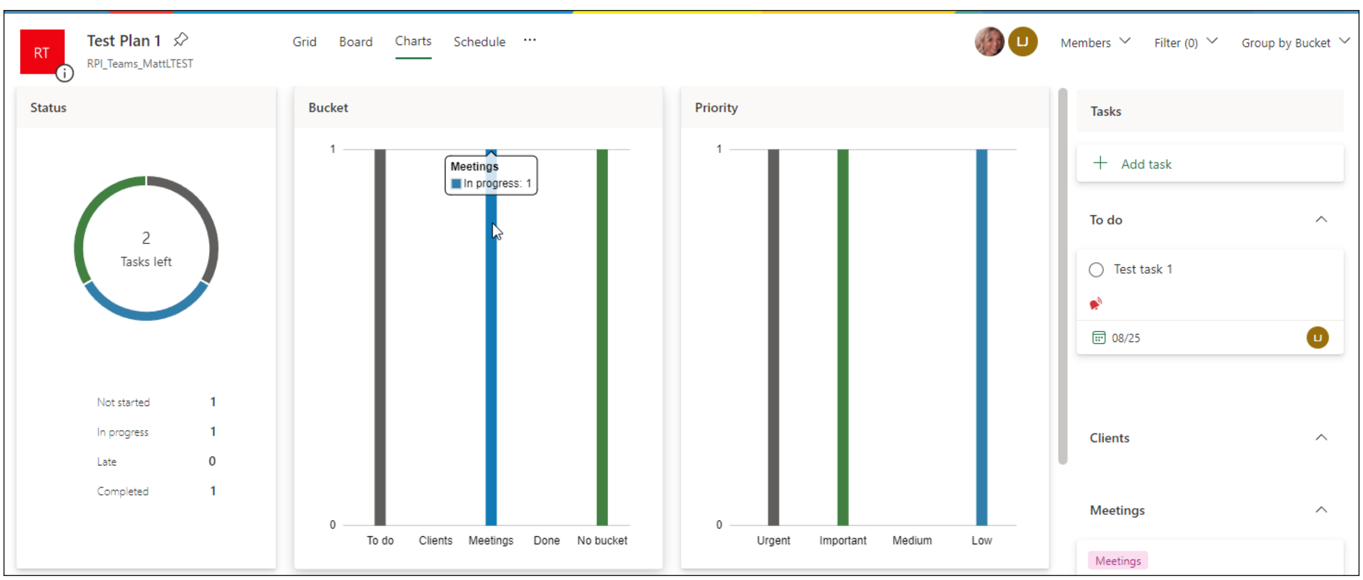
What do the Planner charts show?

- **Tasks** that are past due, not started, in progress, and completed as well as the number of tasks that remain incomplete.
- **What team member has the most tasks** assists in evaluating if some tasks may need to be filtered to other members to stay on track for completion of the plan.
- **Are urgent or important tasks incomplete**. The bar chart view shows tasks marked urgent, important, medium, and low priorities. You can filter to follow-up with team members to see if they need assistance.
- **Status of tasks in each bucket**. A bar chart shows each bucket and the tasks assigned to these buckets. If you hover over each bar, the bucket name and status show in a pop-up window.

  https://www.computerworld.com/article/3586185/microsoft-planner-cheat-sheet.html

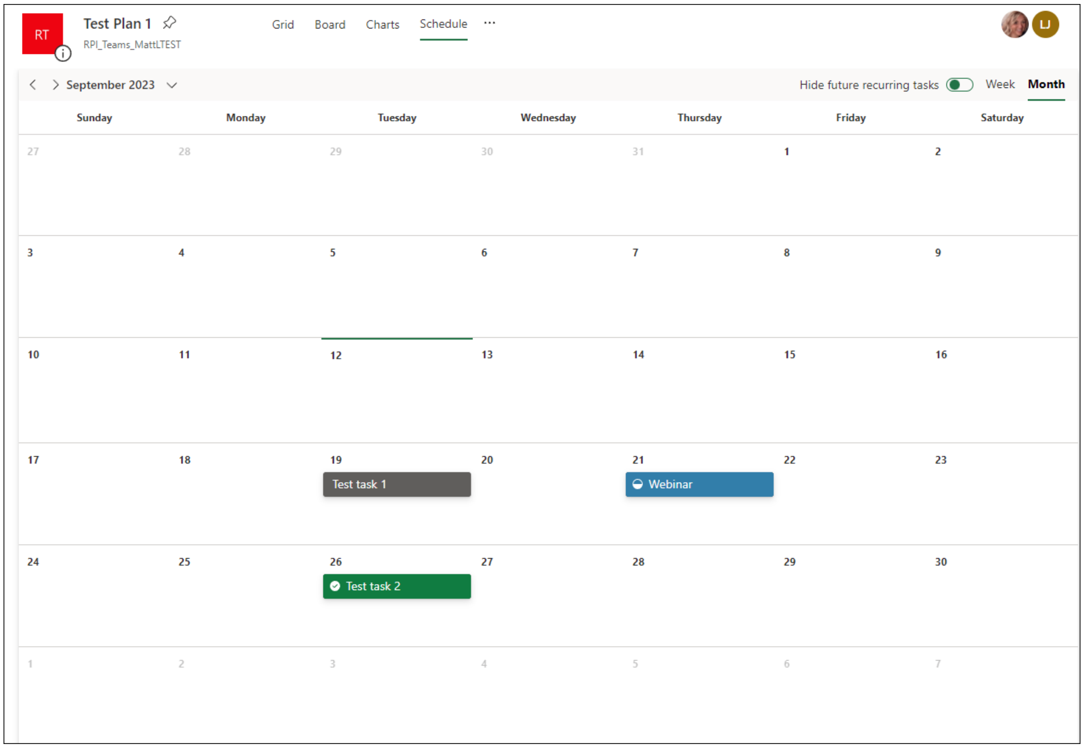
1. Click the **Charts** tab.

The Chart associated with the plan appears.



Schedule tab

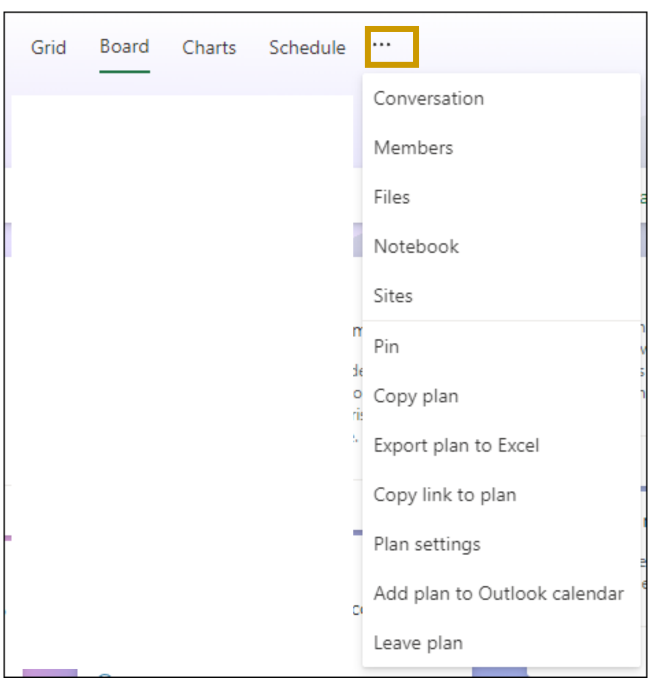
Shows tasks in a calendar view.



Connecting to Apps and integration

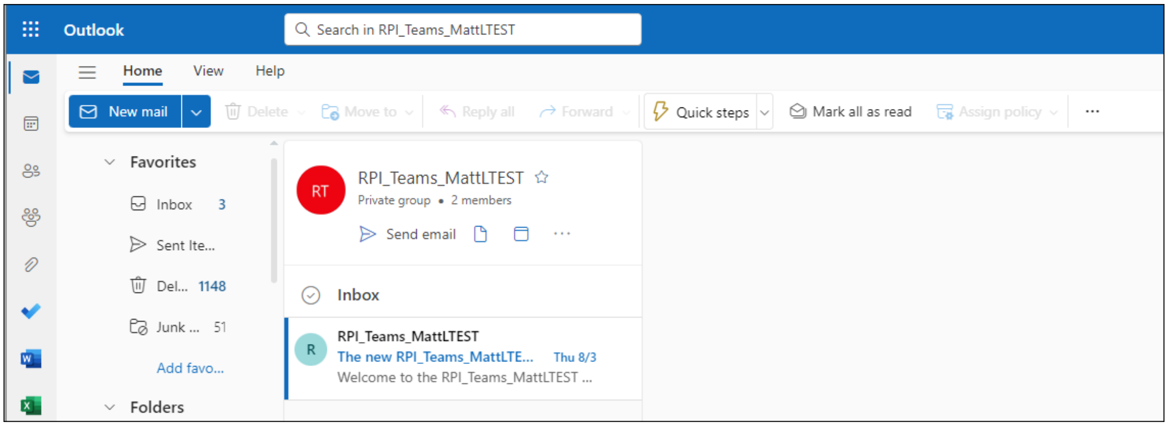
Planner integrates with Teams, OneNote, Outlook, your mobile phone, etc. You can easily export your plan to Excel as well as copy or leave a plan. https://support.microsoft.com/en-us/office/apps-integrations-1bf9c5f2-3e54-44fb-a7ae-c120bd5f482a

1. Open a Plan and then click the **three dots . . .** to the right of Schedule to see all the options.



Conversation

Opens an Outlook window to collaborate with the plan members associate to this plan.



Members

Where you can see information on the plan members as well as where you can add members or leave the group.

Files

Where you can create a new folder, or start a new document from Word, Excel, PowerPoint, OneNote, Forms in Excel, Visio drawings and links. You can upload files, folders, and templates.

Notebook

Opens OneNote to create a digital notebook that syncs with the plan.

Sites

Where you can add new posts and new links.

Copy plan

Don’t create a new plan if you like the way an existing plan is set up! Use the **copy plan** option where you can select a different group as well as select specific parts of the plan you want to copy. View what will or will not copy to a new plan- https://support.microsoft.com/en-us/office/copy-a-plan-50401e13-a25f-40df-93c6-b608cc28c3d4

Export to Excel

Exports the plan to Excel.

	Task Name	Bucket Name	Progress	Priority	Assigned To	Created By	Created Date	Start Date	Due Date	Is Recurring	Late	Completed Date	Completed By	Completed Checklist Items	Checkl
2	Develop strategies and plans	Initiating	Not started	Medium	Rossello, Lynn;Lewis, Matthew	Rossello, Lynn	08/23/2023			false	false			0/2	Analyz
3	Assign responsibilities	Executing	Not started	Medium	Lewis, Matthew J	Rossello, Lynn	08/23/2023			false	false				
4	Summarize project results and lessons learned	Closing	Not started	Medium	Rossello, Lynn	Rossello, Lynn	08/23/2023	08/23/2023	08/25/2023	false	false				
5	Conduct team performance reviews	Monitoring and controlling	Not started	Medium	Rossello, Lynn	Rossello, Lynn	08/23/2023		01/20/2024	true	false				
6	Specify deliverables and acceptance criteria	Planning	In progress	Medium	Lewis, Matthew J	Rossello, Lynn	08/23/2023	08/23/2023	08/25/2023	false	false				
7	Identify goals and objectives	Initiating	Not started	Important	Rossello, Lynn;Lewis, Matthew	Rossello, Lynn	08/23/2023			false	false			0/2	Define
8	Review progress	Executing	Not started	Medium	Lewis, Matthew J	Rossello, Lynn	08/23/2023			false	false				
9	Report monthly status	Monitoring and controlling	Not started	Medium	Lewis, Matthew J	Rossello, Lynn	08/23/2023		10/20/2023	true	false				
10	Document Scope Management Plan	Planning	Not started	Medium	Rossello, Lynn	Rossello, Lynn	08/23/2023			false	false				

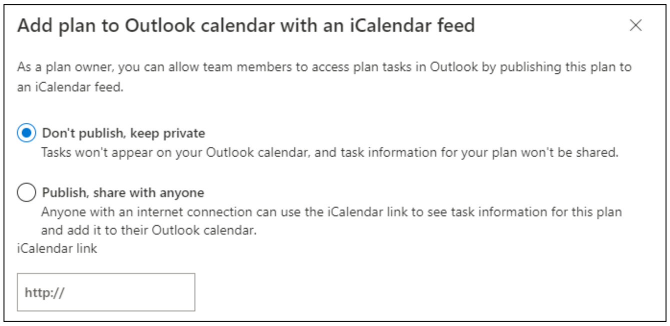
Copy link to plan

Copies a link to the plan for you to paste.

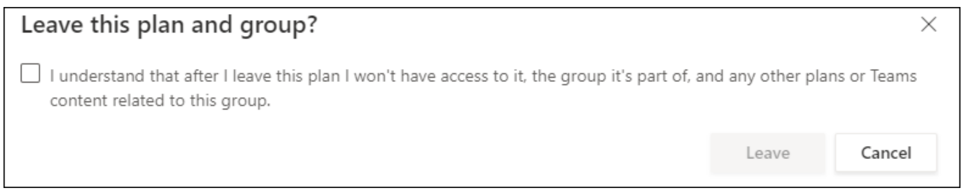
Plan settings

Plan settings screen to change the name of the plan, suggest backgrounds, changes group privacy, notifications and where you can delete the plan.

Add plan to Outlook calendar



Leave plan



Integrate MS Planner with MS Teams

Use Planner in Microsoft Teams

Planner integrates into Teams by choosing the team channel related to the plan you want to use and then click the "+" icon to the right of the tabs to add a tab. Choose Planner, and then pick an existing or create a new plan. Click Save and a tab for the plan is added to the channel in teams.

https://support.microsoft.com/en-us/office/use-planner-in-microsoft-teams-62798a9f-e8f7-4722-a700-27dd28a06ee0?ui=en-us&rs=en-us&ad=us

Google search on the integration with MS Planner and Teams

Reference: Microsoft Project vs Microsoft Planner

https://www.avepoint.com/blog/manage/wtw-microsoft-planner-project