Quick Start Guide

Access all Office 365 applications

Get more detail on your Favorite Plans inside the Planner Hub

Keep up with changes to your plans with notifications

Change your settings in Office 365

Use Office 365 authentication to log in

Add a New Plan

Use the Planner Hub as your Default view

View Tasks that are assigned to you

To get more detail on a Plan make it a favorite

To add people to your plan click to open and add users

Quick Start Guide

Office 365 Planner

Favorite plans

All plans

Creative
Gamification Project
Vi
Vitualizatio

New Plan
2 tasks left
2 Not started 0 Late 0 In progress 0 Completed

Root
1 task left
0 Not started 1 Late 0 In progress 0 Completed

Team Strive to Excellence
33 tasks left
26 Not started 5 Late 2 In progress 7 Completed

Create a Quick Guide for

CRA

Office 365

Add a New Plan

My tasks
6

 oscillator

Forecast

Add a New Plan

Favorite plans

Add a New Plan
Create a Plan in Planner

To get started, you can:

1. Select a plan under Favorite plans or All plans.

OR

2. Start a new plan by choosing New plan.

If you choose to start a new plan:

1. Name your plan.
2. Choose who can see it.
3. Add a description.
4. Select Create Plan.

Creating a plan also creates a new Office 365 Group, making it easy for you and the people you're working with to collaborate not only in Planner, but also in OneNote, Outlook, OneDrive, and more.

Add tasks to a plan

Once you've started a plan, you can add tasks to list what needs to get done.

Enter a task name in the box under to do, and then choose Add task.

Tip: To list several tasks quickly, type a task name in the box under to do, press Enter, and then keep typing to add the next task.

Don't see a box? Click the plus sign (+) to show the box and add a task.
Add People to the Plan

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

Need to Remove Someone

Drag member photos onto tasks

A quick way to assign someone is to drag the person’s photo from the plan member’s area down to their task.

A task can only be assigned to one person. If you need to assign something to more than one person, consider making another task with a similar name, and assigning that task to the other person.

You can also 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, select Add someone new.