An Easy Step-by-Step Guide

Office 365 Planner
Welcome to Office 365 Planner

Office 365 Planner, which offers people a simple and highly visual way to organize teamwork. Planner makes it easy for your team to create new plans, organize and assign tasks, share files, chat about what you’re working on, and get updates on progress. Planner can be used to manage a marketing event, brainstorm new product ideas, track a school project, prepare for a customer visit, or just organize your team more effectively.

To Access Office 365 open a web browser (Internet Explorer, FireFox, Chrome or any other Web Browser). Enter http://portal.microsoftonline.com

Enter your E-Mail Address and your Office 365 password and click sign in.

Select Planner
Teamwork organized

One of the most valuable aspects of Planner is that it helps teams organize their work visually. Each plan has its own Board, and within each Board, each work item or task is represented by a Card that can have due dates, attachments, categories and conversations associated with it. Team members receive an email notification whenever they are assigned a new Card or added to a conversation.

Every Card can have documents (or pictures) attached that automatically get rich image previews, so it is easy to understand what the Card is about at a glance. In addition, Cards can be organized on the Board into customizable columns called Buckets, which can be prioritized and tagged with colored labels.

Planner also gives you views to keep your work on track. The Hub view lets you track overall progress across all plans, while the “My tasks” view lets you filter down to see just what you need to do across every plan. In addition, the “Charts” view includes interactive charts for visualizing people’s progress against deadlines. Click a red segment on the histogram to quickly see which aspects of a plan are behind schedule and use the Board to rebalance work across the team. With Planner, everyone is always on the same page. A single glance of the Charts view is all it takes to know where things stand.

1. When you’re done and you want to go back to where the file is saved, click your name, next to the file name.

   (Or, click the back button in your browser to go back to where your document is saved. If you click Back, click refresh to see your new document in the file list.)

**Tip** If you want access to all app features, you can switch to the full Office app. For example, in Excel Online, click **Open in Excel** to continue working on the document in Excel.
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 details to a task

Tasks can have a lot of different details in Planner. You can decide what you want to include or leave out, and how you want your tasks to appear on the Board.

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

When you're ready to decide who's doing what, there are several ways you can assign tasks to people in Planner.
Drag member photos onto tasks

A quick way to assign someone is to drag the person’s photo from the plan members 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.
Select names to change assignments

If you need to change who a task is assigned to, select the name of the currently-assigned person on the task, and then choose a new person from the list.

You can also change the Board to be grouped by Assigned to, and then drag tasks between the columns for each person on your team.
Need to remove someone?

If you no longer need someone on your plan, select the arrow next to the plan members, point to the person you're removing, select the three dots, and then choose Remove from plan.