Planner for Teams: Quick Guide

Microsoft Planner is a simplified task management tool, useful for streamlining collaboration and managing small team workloads and projects in a visual way. This simple platform within Microsoft Teams, enables your team, your project and you, to be organized, on-task and work together, as all tasks and progress is visible to all Team members.

Adding a Planner Tab

1. From O365 online, launch Teams from the Application Launcher or launch the **Microsoft Teams** Desktop app.
2. **Open** the **Team** and then the specific Channel to add the **Planner** tab to.
3. Click add a tab **+ button** from the Channel Tab menu.

> PT **Project Team** > **General** ···
> Conversations   Files   +
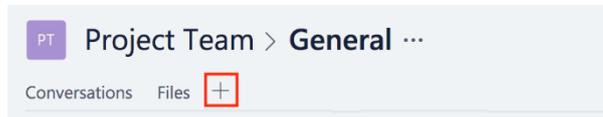
4. **Select Planner** from the list of options.

> **Add a tab**   ✕
>
> Turn the team's favorite apps and files into tabs at the top of the channel.
>
> Excel   PowerPoint   Planner   Word   OneNote
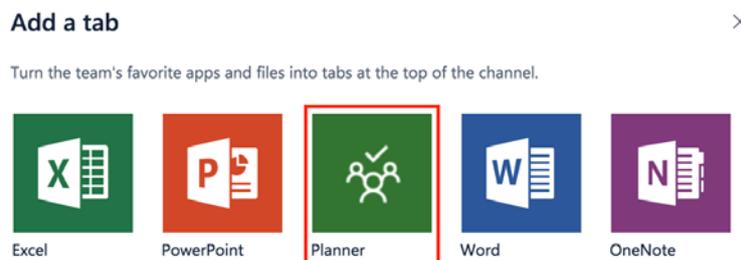
5. **Create** a new plan and add a name.
   Multiple Planner tabs and multiple Plans are able to be used within a single Team or Channel.

> **Planner**   About ✕
>
> Planner makes it easy for your team to stay organized, assign tasks, and keep track of your progress. Create a new plan so you can start getting things done.
> Learn more
>
> ○ **Create a new plan**
>   Tab Name
>   [   ]
>
> ● **Use an existing plan**
>   Looks like this team has existing plans.
>   Select an existing plan to add it as a tab.
>   [Project Team   ⌄]
>
> ☑ Post to the channel about this tab
>
>   [Back]   [Save]
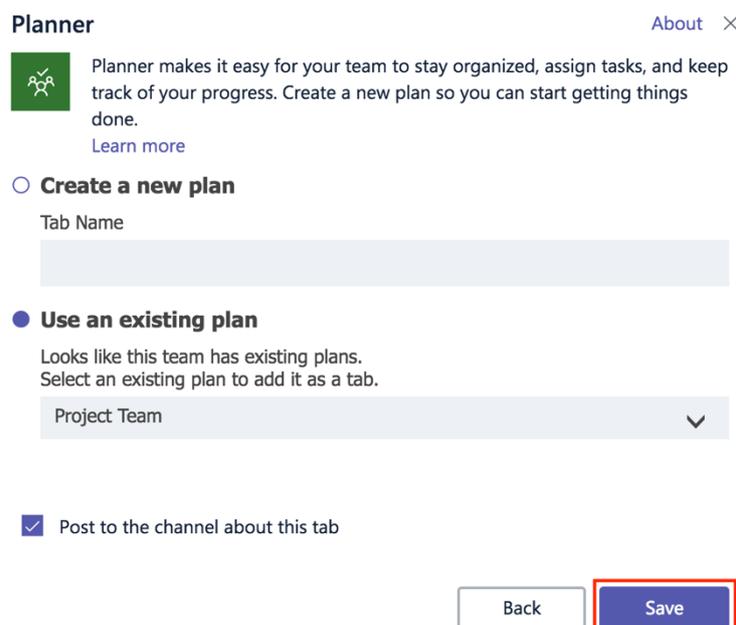
6. Click **Save** and the Planner tab will be visible on the Channel Tab menu and the default Planner Home screen will be visible.

Task Functions

Create a New Task

1. **Open** required **Planner** from the Channel Tab menu.

2. **Click ✛** on the Planner Home screen to add a new task.

3. Type **task name**.
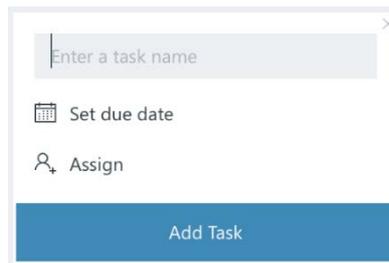
4. **Click Set due date**.
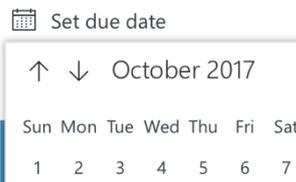
5. **Click Assign** and type Team member's name, to assign a specific task to a person or multiple people.
   A list of Team members will be displayed, allowing quick selections from the list.
   Tasks in Teams can only be assigned to current Team members.
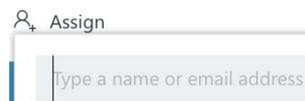
6. **Click Add Task** to save.

Mark Task as Completed

To display a single task as completed, **click** the **check mark icon** in the top right of the task box.

Delete a Task

At present ANY Team member can delete any task (their own or others) so best to only delete a task if absolutely necessary and if you are sure no one else in the Team needs the information.

To delete a single task, **click** the options menu **...** on the task box and select **delete**.   Any Team member can delete a task. Tasks cannot be recovered once deleted.
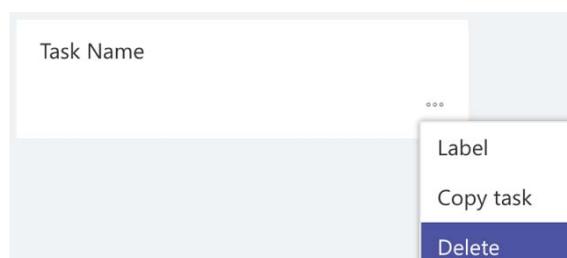
Grouping Tasks

Tasks can be grouped using buckets. Each Team member may have their own bucket or buckets may be created to reflect important Project stages. Customise buckets to suit each plan and your specific Team or project requirements.

Click Add new bucket from the planner home screen, this option may be hidden and require scrolling to the right, to view.
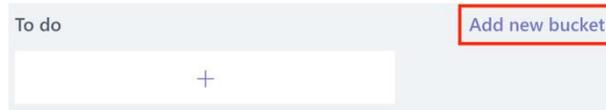
Additional Task Functions

Once a task is created there are additional options available via the details panel. C**lick** the **Task Name** to view the detail panel and add additional information.

Available options:

- **Bucket**   Assign task to specific bucket
- **Progress**   Indicate the task stage (Not started, In progress, Completed)
- **Start date**   Set a date to start task
- **Description**   Add a detailed description of task
- **Checklist**   Create list of sub tasks or task steps
- **Attachments**   Attach files or documents for reference
- **Comments**   Send comments about Task, to Team members using tags (@membername)