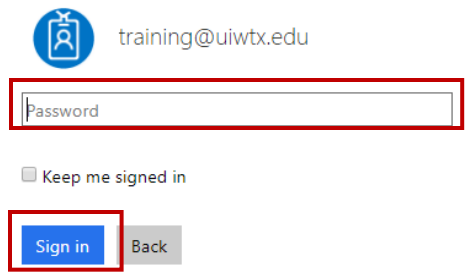
Office 365 Planner

Microsoft Planner is a flexible collaboration tool. It provides reports, is accessible all plan members, and can be configured to suit the goals and needs of planners. Planner works with Groups. When you create a group, you create a plan, and vise-versa

Create a plan

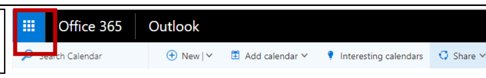
1. Go to https://www.outlook.com/uiwtx.edu and login with your UIW username and password

1



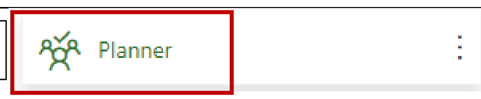
2. At the top of the screen, select the **Waffle**

2



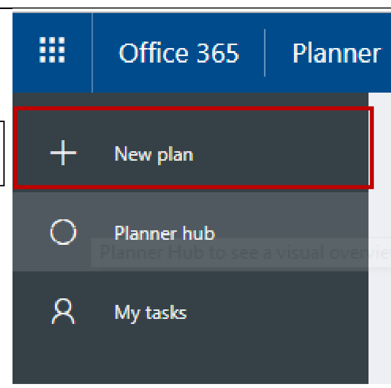
3. Select **Planner** from the App list

3



4. Planner opens. Click New **Plan**

4



5. Give the plan a **name**
6. Leave the privacy setting at *private*
7. Click **Create Plan**

5

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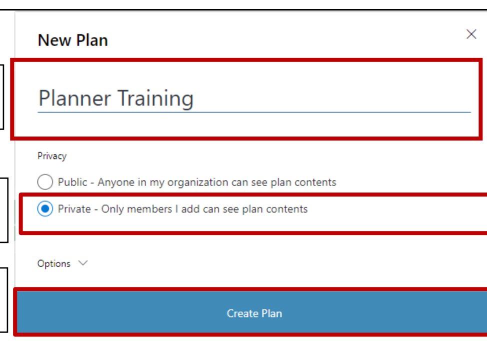

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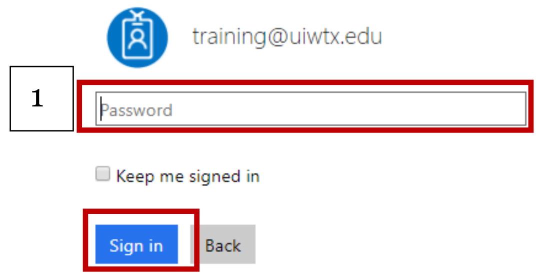
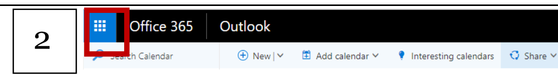
INSTRUCTIONAL TECHNOLOGY

Open a Plan from groups

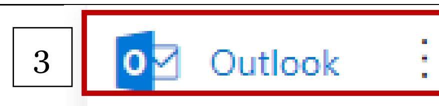
1. Go to https://www.outlook.com/uiwtx.edu and login with your UIW username and password



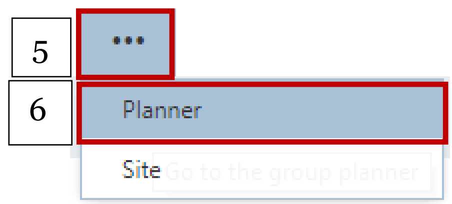
2. At the top of the screen, select the **Waffle**



3. Select **Outlook**
4. Select a **Group**



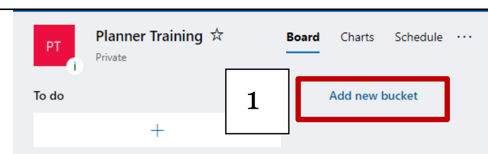
5. As noted above, when you create a group, you create a plan. Locate the **ellipsis (…)** at the top of the screen
6. Select **Planner**
7. The plan opens



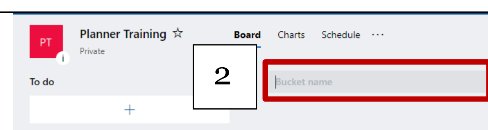
Create buckets

Each plan contains buckets. A bucket can be seen as a set of tasks. Buckets can be arranged by type of task, task assignee, or progression. It is best to arrange buckets so that they can be visualized.

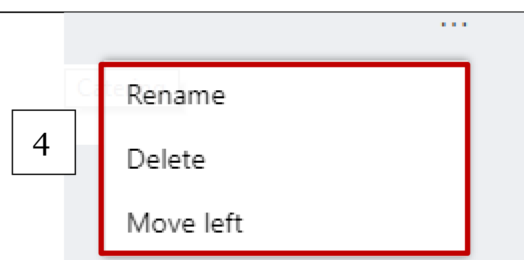
1. Click **Add new bucket**



2. *Name* the bucket
3. You should create a bucket for each set of tasks needed to complete the plan.



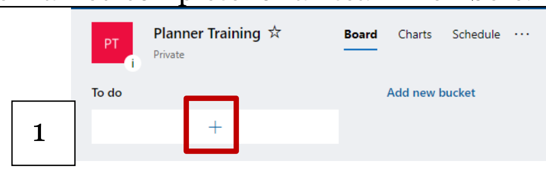
4. All plans start with a **To do** bucket. If you mouse over the *bucket name,* you can **Rename, Delete,** or **Move** this or any bucket



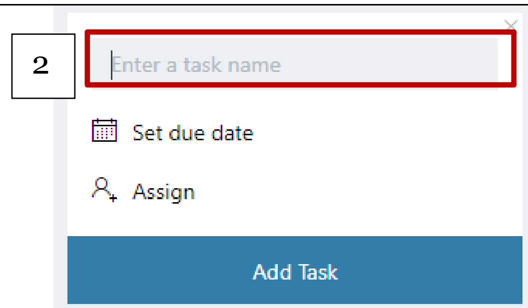
Create tasks

The third level are the tasks themselves, created within a bucket. Tasks have three properties: the *task name*, the *assignee* and the *deadline*. Tasks can be assigned to more than one person. In fact, you can assign it to up to *11 people* so that they can all see it in their My Tasks list. When any team member marks the task complete, it's marked complete for all team members.

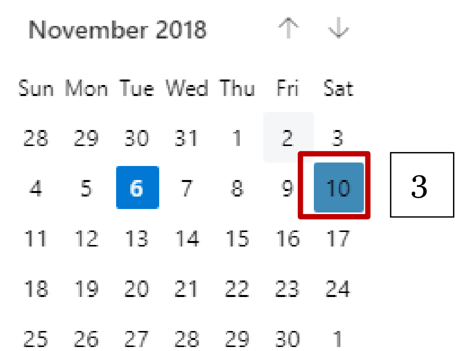
1. Select **+** below the heading of the bucket to which you want to add a task.



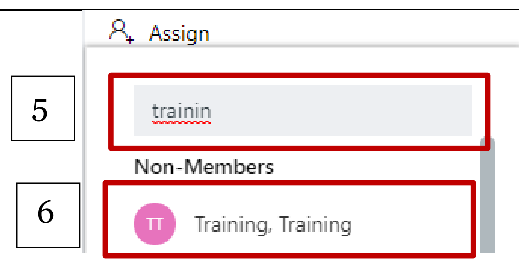
2. Select **Enter a task name** and n*ame the task*



3. Select **Set due date** and *select a date*

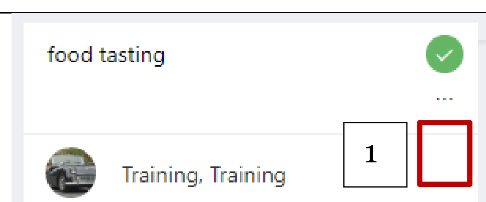


4. Click **Assign**
5. Type in the **username** of the person you want to assign the task
6. Click the **name** when it appears on the list
7. Repeat these steps to for each additional task



Completing tasks

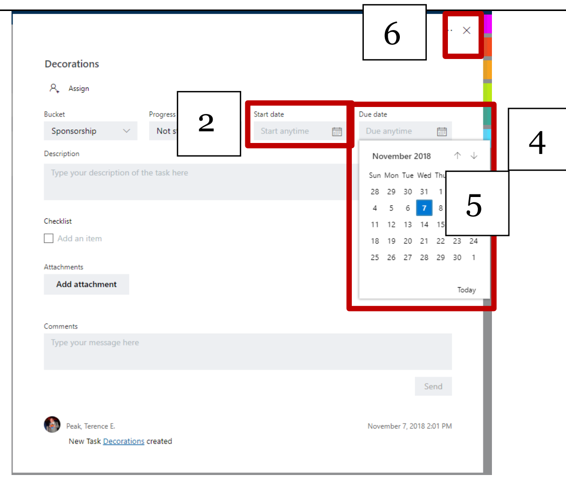
1. When a task is complete, click the **green checkmark**



Add task start and due dates

1. Select the task to open the task window.
2. Select **Start anytime**
3. Select the **start date** you want
4. Select **Due anytime**
5. Select the **due date** you want
6. Select **Dismiss** ✕ in the upper-right corner of the task window to *save and close* the task

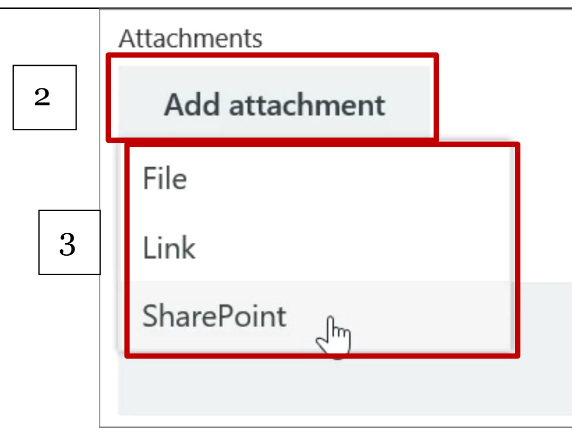
Note This process can also be carried out for all tasks in the plan by clicking the schedule link



Add an attachment to a task

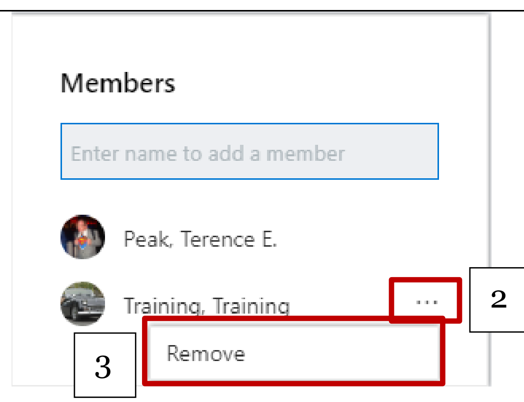
You can upload the file to OneDrive or browse to locate a file. If your file isn't located on OneDrive, you can add a link to the file.

1. Select a task to open the task window
2. Select **Add attachment**
3. Select **File** to attach a locally stored file, select **Link** to include a link, or select **SharePoint** to attach a file from a SharePoint site
4. Locate and select the file you want to attach or enter the link information



Remove Plan members

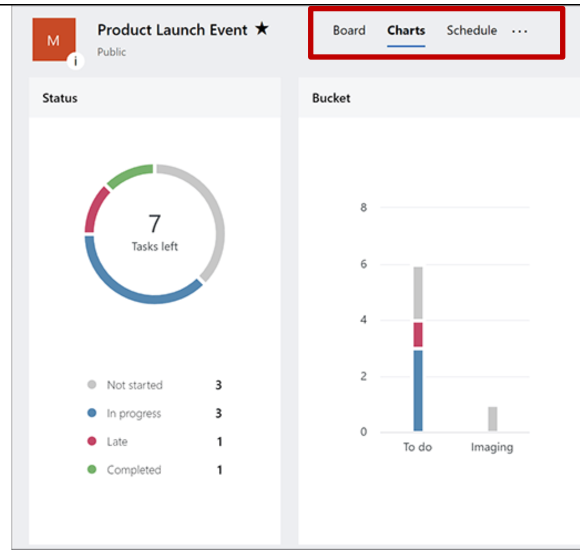
1. To remove someone on from a plan, select the **arrow** next to the plan member's name
2. Select the **ellipsis** (three dots)
3. Choose **Remove.**



View plan and get updates in Planner

In Planner, every plan has a board, a chart and a schedule. Select *Board, Charts or Schedule* at the top of the Planner window to switch between them.

- **Board** offers a flexible way to organize your team's work and makes it easy for you to see who's doing what and get details about any task.
- **Charts** show how your plan is progressing, with details about a plan's progress. These details include what's been *done*, *in progress*, *not started,* and *late*.
- **Schedule** allows you to schedule, assign and complete tasks



Get email about tasks and due dates

You'll automatically receive email notifications when tasks are assigned, or action is required. These notifications can be turned on or off.

1. Select the *settings button* near the top right of the screen and then choose **Notifications**.
2. Check or uncheck one or both of the following notification options:
   - Someone assigns a task to you
   - A task assigned to me is late, due today, or due in the next 7 days
3. Click **Save**

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