

MS Teams - Using PLANNER

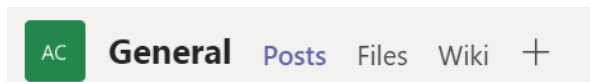


Planner

Microsoft Planner is a task management tool, useful for streamlining collaboration and managing team workloads and projects in a visual way. It 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. Open the **Team** and then the specific Channel to add the **Planner tab** to.
2. Click add a tab **+** button from the Channel Tab menu.

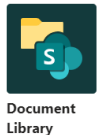


3. **Select Planner** from the list of Options

Add a tab

Turn your favorite apps and files into tabs at the top of the channel
[More apps](#)

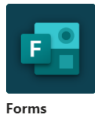
Search



Document Library



Excel



Forms



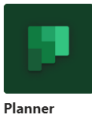
Jira Server



OneNote



PDF



Planner

4. **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. You can not use Planner on private channels.

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

Name your plan

☐ Use an existing plan from this team

Looks like this team has existing plans. Select an existing plan to add it as a tab.

Existing plans



☒ Post to the channel about this tab

Back

Save

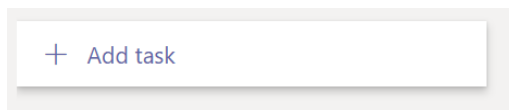
5. Click **Save** and the Planner tab will be visible on the Channel Tab menu and the default Planner Home screen will be visible.

Creating a new Task

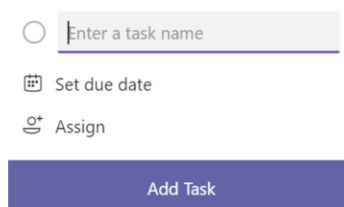
1. Open required Planner from the Channel Tab menu.



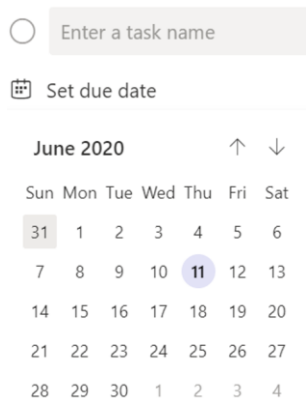
2. Click + on the Planner Home screen to add a new task.



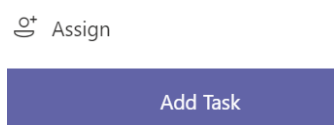
3. Type task name.



4. Click Set due date.



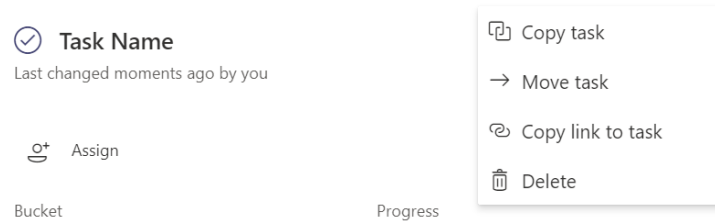
5. Click Assign and type Team member's name, to assign a specific task to a person or multiple people. A list of Team members will be displayed, allowing quick selections from the list. Tasks in Teams can only be assigned to current Team members.



6. Click Add Task to save.

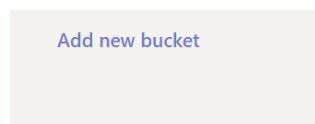
Deleting a Task

At present any Team member can delete any task (their own or others) so only delete if necessary and that 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. Click 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 the task
Checklist	Create list of sub tasks or task steps
Attachments	Attach files or documents for reference
Comments	Send comments about Tasks, to Team members using tags (@membername)

Task

Last changed 2 minutes ago by you

Assign

Bucket

In Progress

Progress

☐ Not started

Priority

Medium

Start date

Start anytime

Due date

Due anytime

Notes

Type a description or add notes here

Checklist

☐ Add an item

Attachments

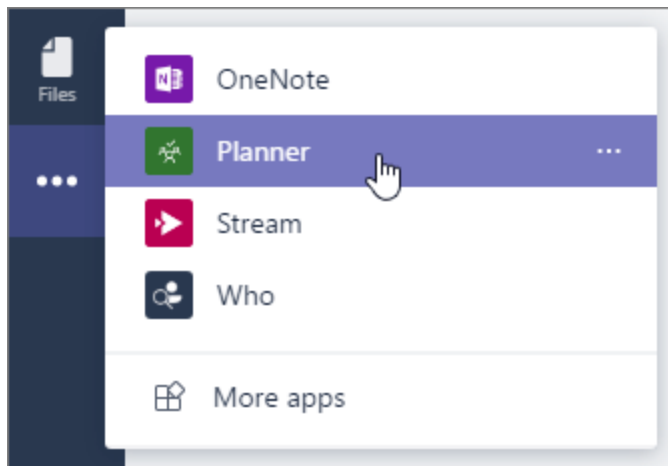
Add attachment

Comments

Type your message here

Planner Personal App

In Teams, in the left column, choose **More options ...**, and select **Planner**.



On the **My Tasks** tab, you can see all of the tasks assigned to you in Planner. The **Recent** and **All** tabs show you Teams-created plans you've recently looked at and a list of all plans you're a part of in Teams.