



Professional Development
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Too Many Spinning Plates – Mastering Microsoft Planner

January 29, 2025



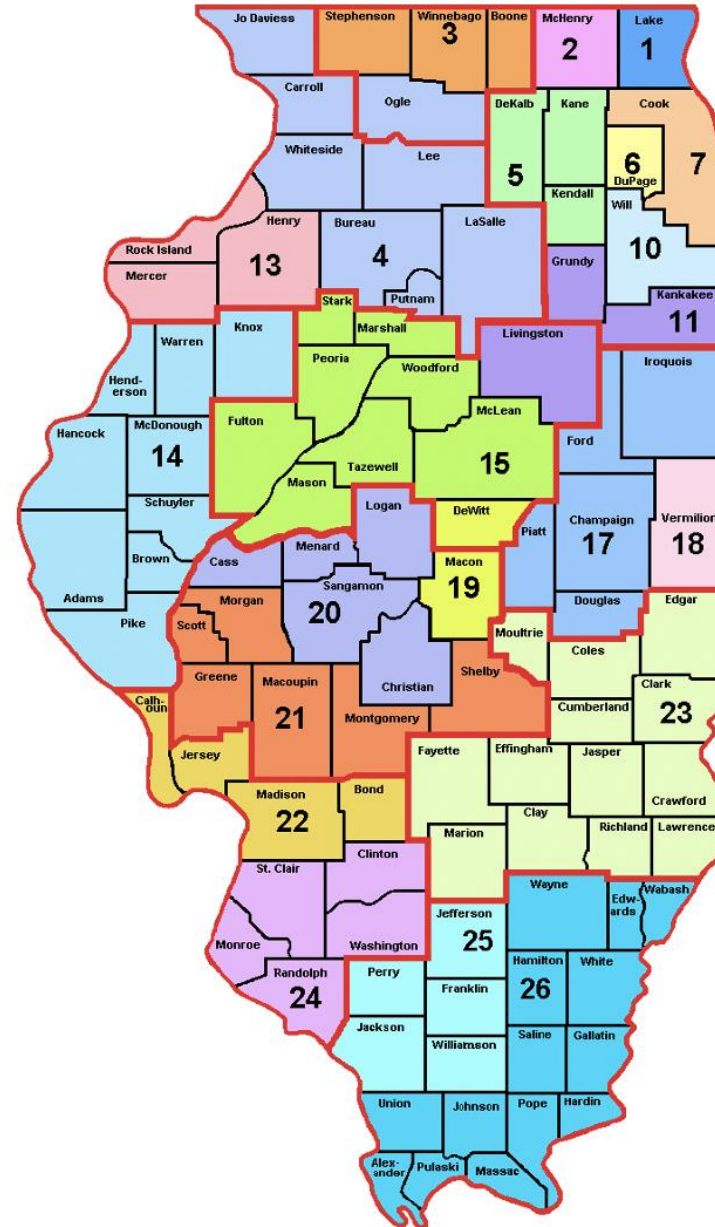
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Welcome

- I will be your **moderator** and **technical support**
- Please hold all **questions** until the Q&A portions of this webinar or post questions in the chat
- This webinar will be offering **closed captioning**
- We will be **recording** this webinar
- A recording and all materials will be available within **two business days** on the [Illinois Workforce Academy](#)
- **Let's get started with some polls...**

Where is Your Local Area?



Which partner do you best represent?



What is Microsoft Planner?

- Default task manager for Microsoft Teams
- Free with Microsoft Office 365
- Helps stay organized when you have a lot on your mind
- Helps stay organized when working as a team on a project
- Helps with reporting



Why Microsoft Planner?



**Because
it's
convenient
and I'm
busy**

My Priorities




**Can I add
things
quickly?**



**Is it low-
maintenance?**

Adjust to Your Needs



Use all the bells
and whistles

K.I.S.S.

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Section 1: I Talk At You

You can Access Planner two ways:

- In your **browser**
- On the **Teams app**

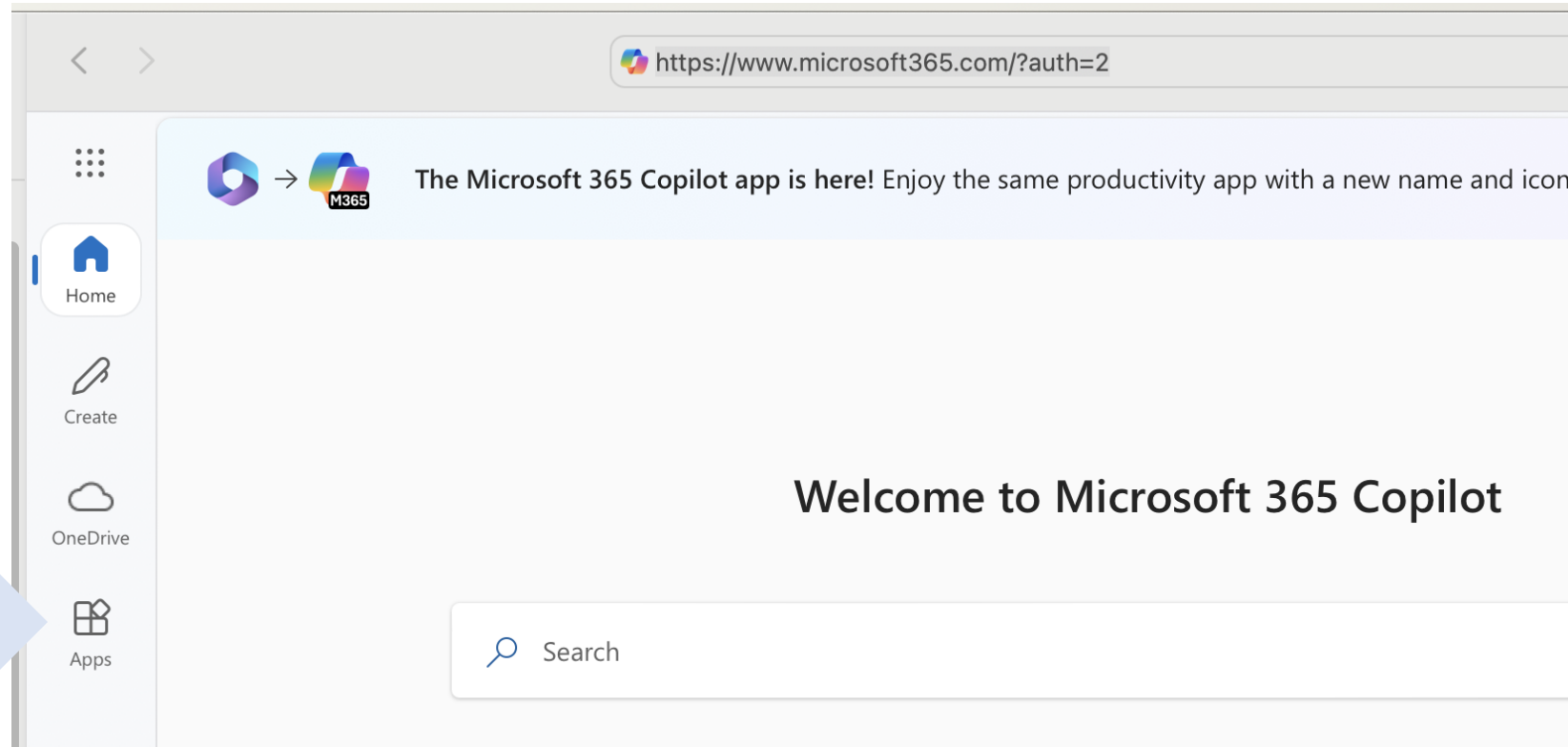
Why Do I **Prefer** the Teams App?

- With spotty connection, your edits might not sync in browser
- You don't have to keep the web version bookmarked
 - Great for if you need to write down stuff quickly

Set-Up

In browser:

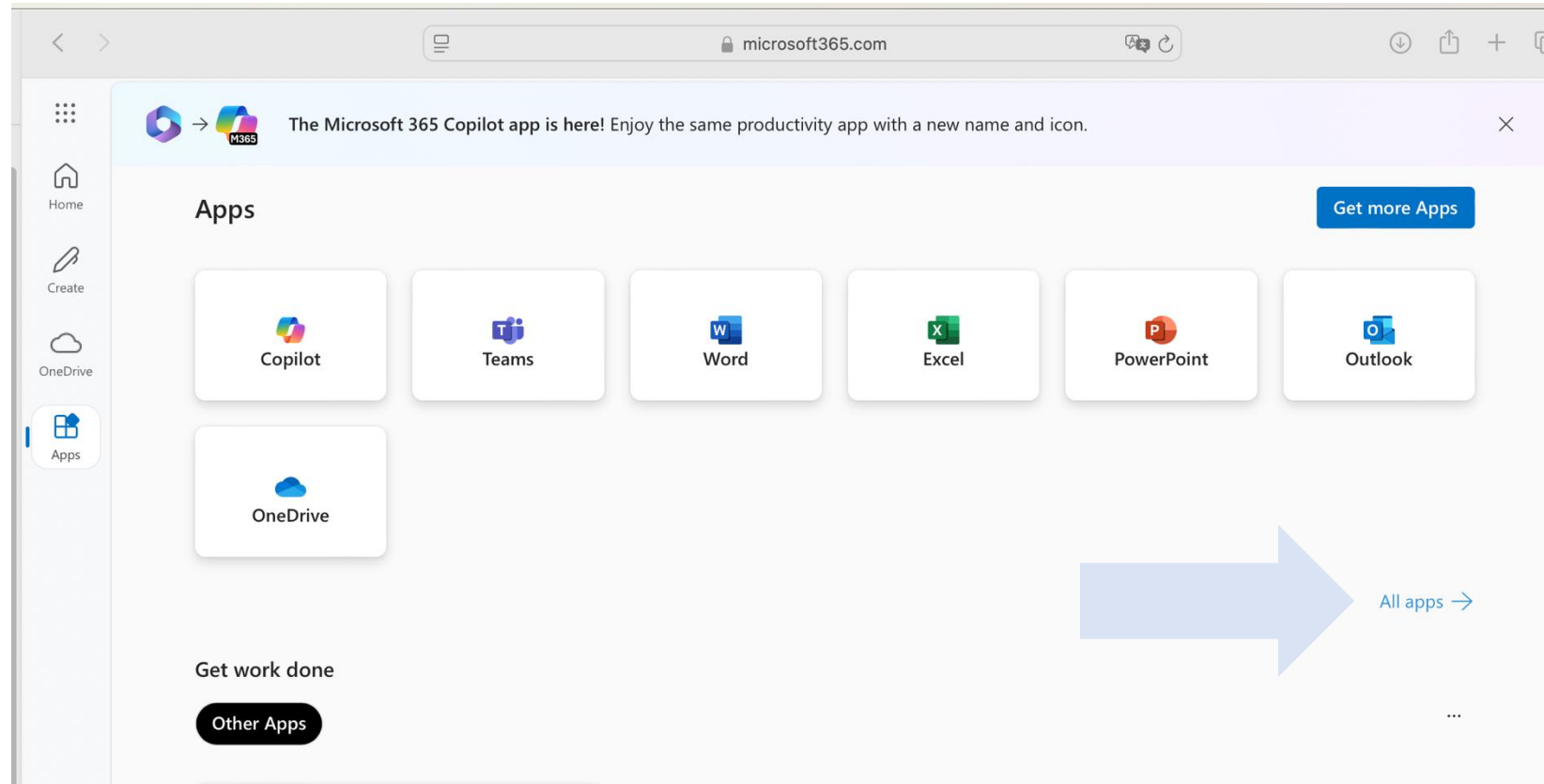
- ✓ Go to [microsoft365.com](https://www.microsoft365.com)
- ✓ Click “Apps” on left-hand side:



Set-Up

In Apps:

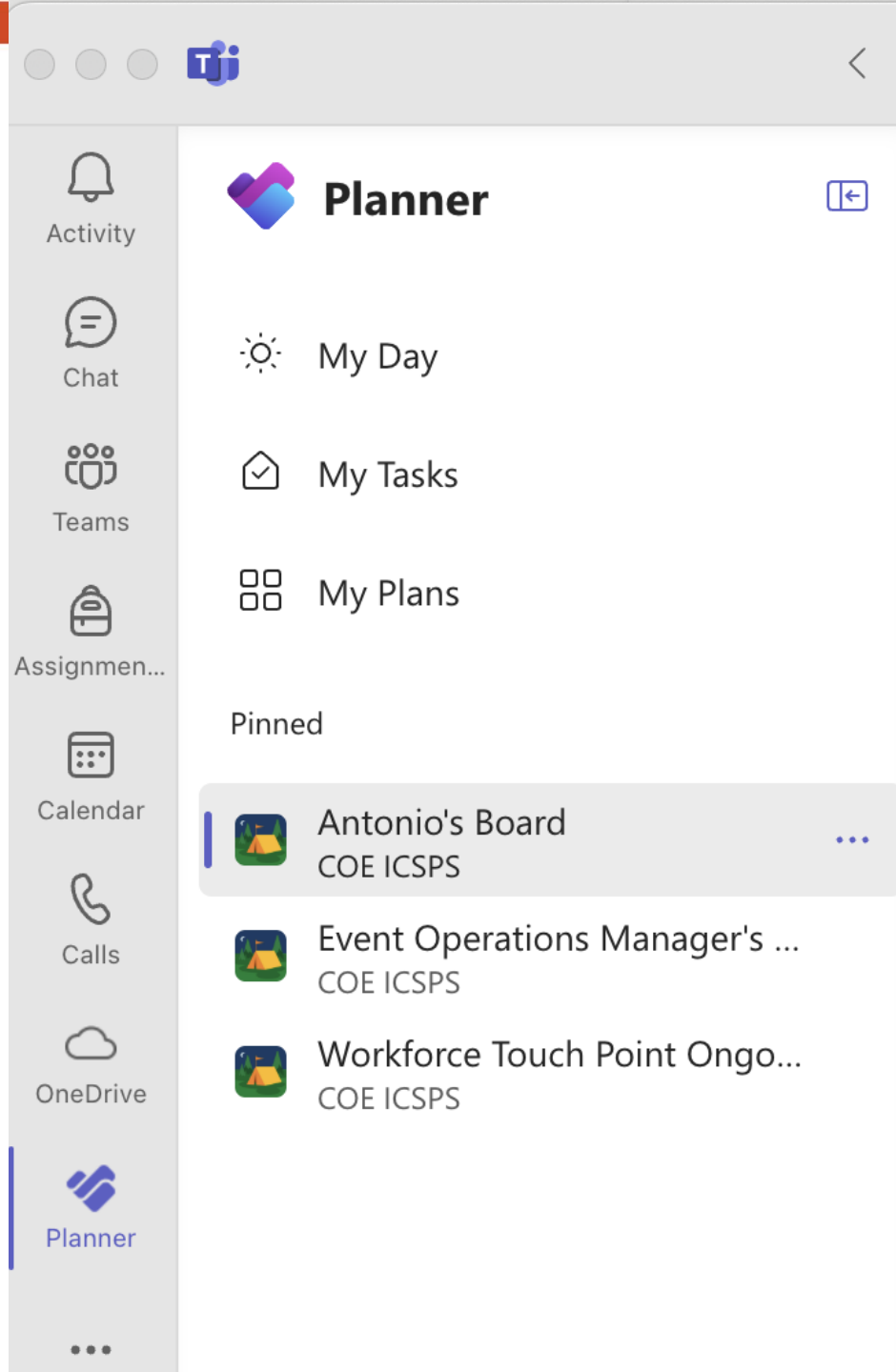
- ✓ Click “all apps”
- ✓ Scroll down until you see the Planner icon and click:



On Teams:

- ✓ Click “Apps” on the bottom left-hand side
- ✓ Type ”planner” in the search bar
- ✓ Click “add”
 - ✓ This will add planner to the bar on the left

The screenshot shows the Microsoft Teams application window. On the left-hand side, the navigation pane includes icons for Activity, Teams, Assignments, Calendar, Calls, OneDrive, Planner, and a plus sign for Apps. A blue arrow points from the 'Apps' icon in the navigation pane to the search bar in the main content area. The search bar contains the text 'planner'. Below the search bar, the 'Apps' section is displayed, showing a list of featured apps, categories, and industries. A second blue arrow points from the search results to the 'Planner' app card, which has an 'Open' button. The search results also show other apps like 'polumana Tour Route Plan...' and 'Workflows (8)'.



Set-Up

Once You Added Planner to Teams:

- ✓ Take a moment to look at your plans
- ✓ You'll see “My Day” “My Tasks” ”My Plans”
- ✓ You'll see “Pinned” plans
- ✓ I like to create as few plans as possible, but that is **personal preference**

< **Create a basic plan from scratch** ×

Name *

Test Plan



Add to my pinned plans

Add to a group (optional)



Create

Set-Up

To Create a New Plan :

- ✓ Click "new plan" on the bottom left
- ✓ Select "Basic Plan"
- ✓ Name your plan and determine if you want to add it to your pinned plans



All the Moving Parts

Take a look at your new plan...

The screenshot displays a web-based project management application. At the top, there is a navigation bar with a search field labeled 'Search (Cmd+E)', an 'Update ...' button, and a user profile for 'IL State Univers...'. Below this is a secondary navigation bar with options: 'My Plans >', 'Test Plan' (selected), 'Grid', 'Board' (underlined), 'Schedule', and 'Charts'. On the right of this bar are icons for a lock, a user, and a help icon. The main content area features a search bar 'Filter by keyword' and two dropdown menus: 'Filters' and 'Group by Bucket'. A 'To do' section is visible with a 'Add new bucket' label and a text input field containing '+ Add task'.

All the Moving Parts

Take a look at your new plan...

The screenshot displays a web-based project management application. At the top, there is a navigation bar with a search input field containing the text "Search (Cmd+E)", which is highlighted with a thick orange border. To the right of the search bar are buttons for "Update ..." and a user profile icon labeled "IL State Univers...". Below the navigation bar is a secondary menu with options: "My Plans > Test Plan", "Grid", "Board" (which is underlined), "Schedule", and "Charts". On the right side of this menu are icons for a lock, a user profile, and a help icon. The main content area features a search bar labeled "Filter by keyword" and a "Filters" dropdown menu. Below the search bar, there is a "To do" section with an "Add task" button and an "Add new bucket" link.

All the Moving Parts

Take a look at your new plan...

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All the Moving Parts

Take a look at your new plan...

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All the Moving Parts

Take a look at your new plan...

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All the Moving Parts

Take a look at your new plan...

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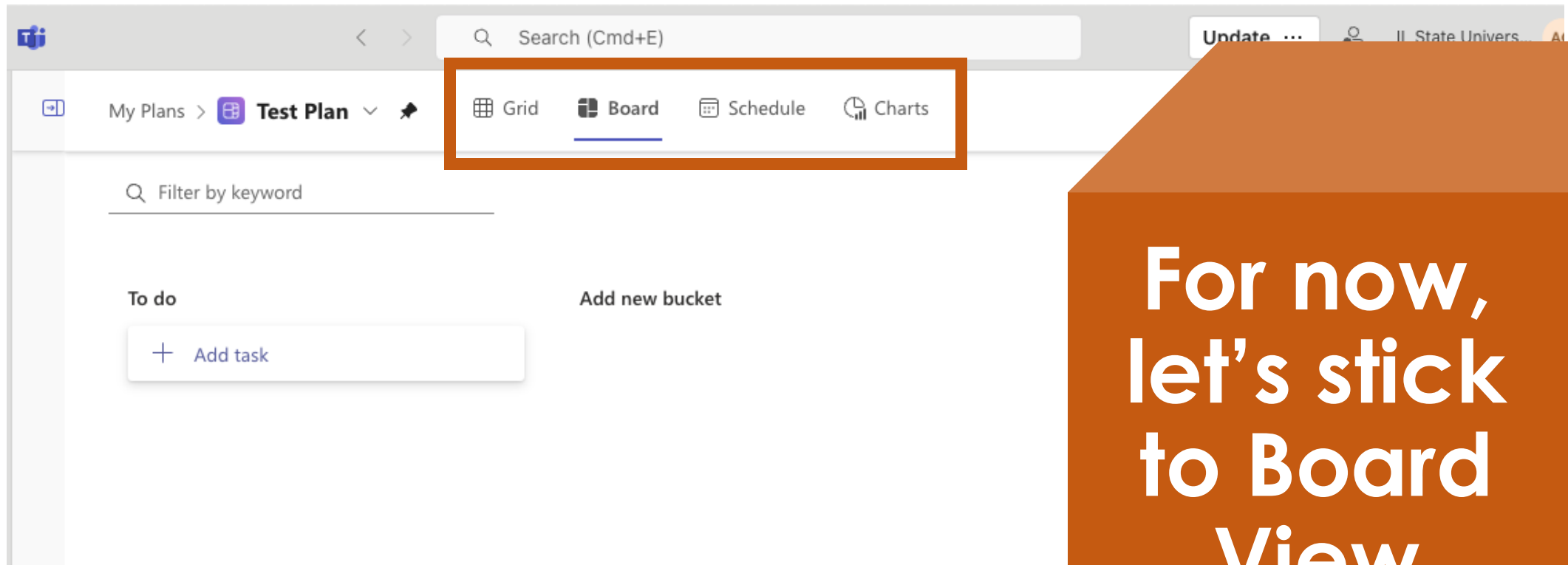
All the Moving Parts

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All the Moving Parts

Take a look at your new plan...



For now,
let's stick
to Board
View

All the Moving Parts

There are two main building blocks:



**Tasks
(post-its)**



**Buckets
(columns)**

**I'll go into more detail in
Section 2**

Working with Planner as a Team

Adding users to your plan:

The screenshot displays the Planner application interface. At the top, there is a search bar with the text "Search (Cmd+E)". To the right of the search bar, there are three dots, a user profile icon, and the text "IL State Univers..." with a green checkmark and the initials "AG". Below the search bar, there is a navigation bar with the following items: "My Plans >", "Test Plan" (with a dropdown arrow and a pin icon), "Grid", "Board" (with a blue underline), "Schedule", "Charts", and a blue arrow pointing to a "Add User" icon (a person with a plus sign). To the right of the "Add User" icon is a help icon (a question mark). Below the navigation bar, there is a filter bar with a search icon and the text "Filter by keyword". To the right of the filter bar, there are two dropdown menus: "Filters" and "Group by Bucket". At the bottom of the screenshot, there are three items listed: "To do", "Rabbit", and "Chinese Buffet".



Create a group:

- By default, all members of your organization will be able to access your planner
- Be aware that **all members of your organization will be able to access your planner**

Invite members



Add members to create a group. Already have one? Choose an existing group.



Create group



Add to existing group

Your organization's global admin has turned off the ability to create new Microsoft 365 groups. Choose an [existing group](#) instead

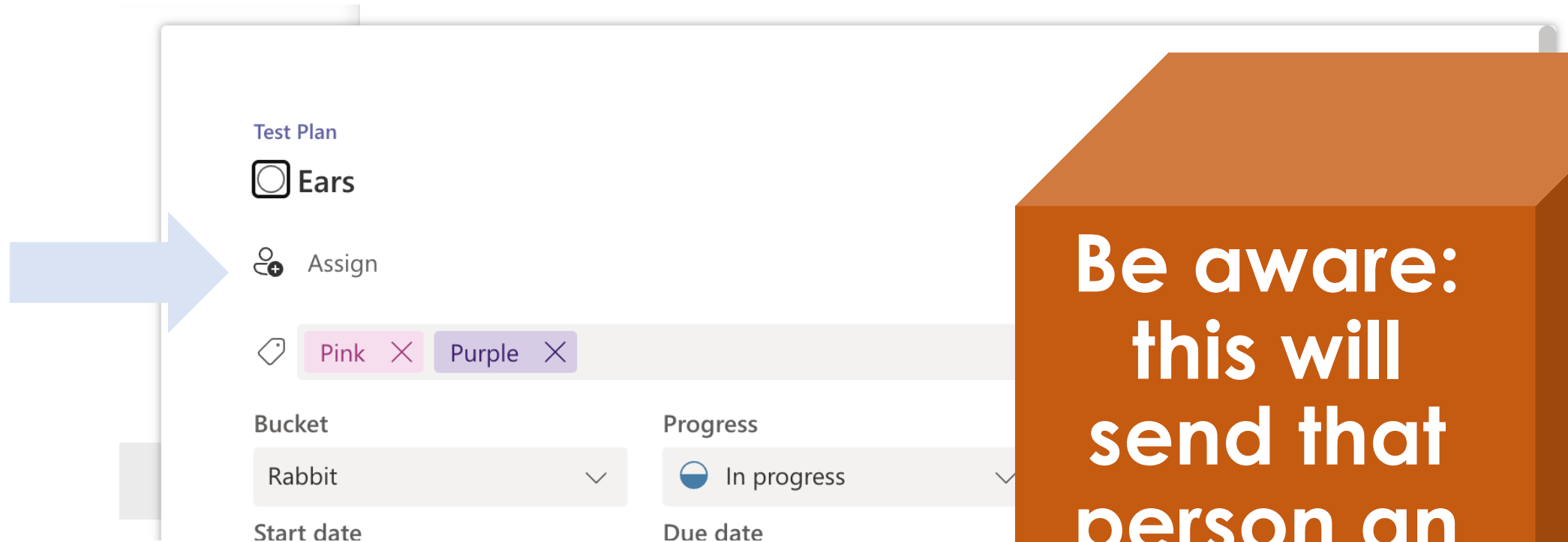
Add members to create a new group

Enter name

Create group

Working with Planner as a Team

Adding users to a task:



**Be aware:
this will
send that
person an
email**

Don't be rude! Talk to your
Team about how you
assign tasks.

Once other users are assigned to a task:

- They will be able to edit the task to show their progress or leave notes





Once other users are assigned to a task:

- All users in your organization have the capacity to edit your planner, so **please communicate to your team not to edit tasks on other people's planners without their permission**

Reporting

Ways you can run reports:

- Project manager can check on what you're working on to include in their reports or to gauge capacity for new work
- Reporting feature can show your progress towards a goal
- Completed tasks can show you what work you have done and when for external reports (e.g. quarterly reports)

Reporting

My Plans > **Test Plan**

Grid

Board

Schedule

Charts

🔒

Share

?

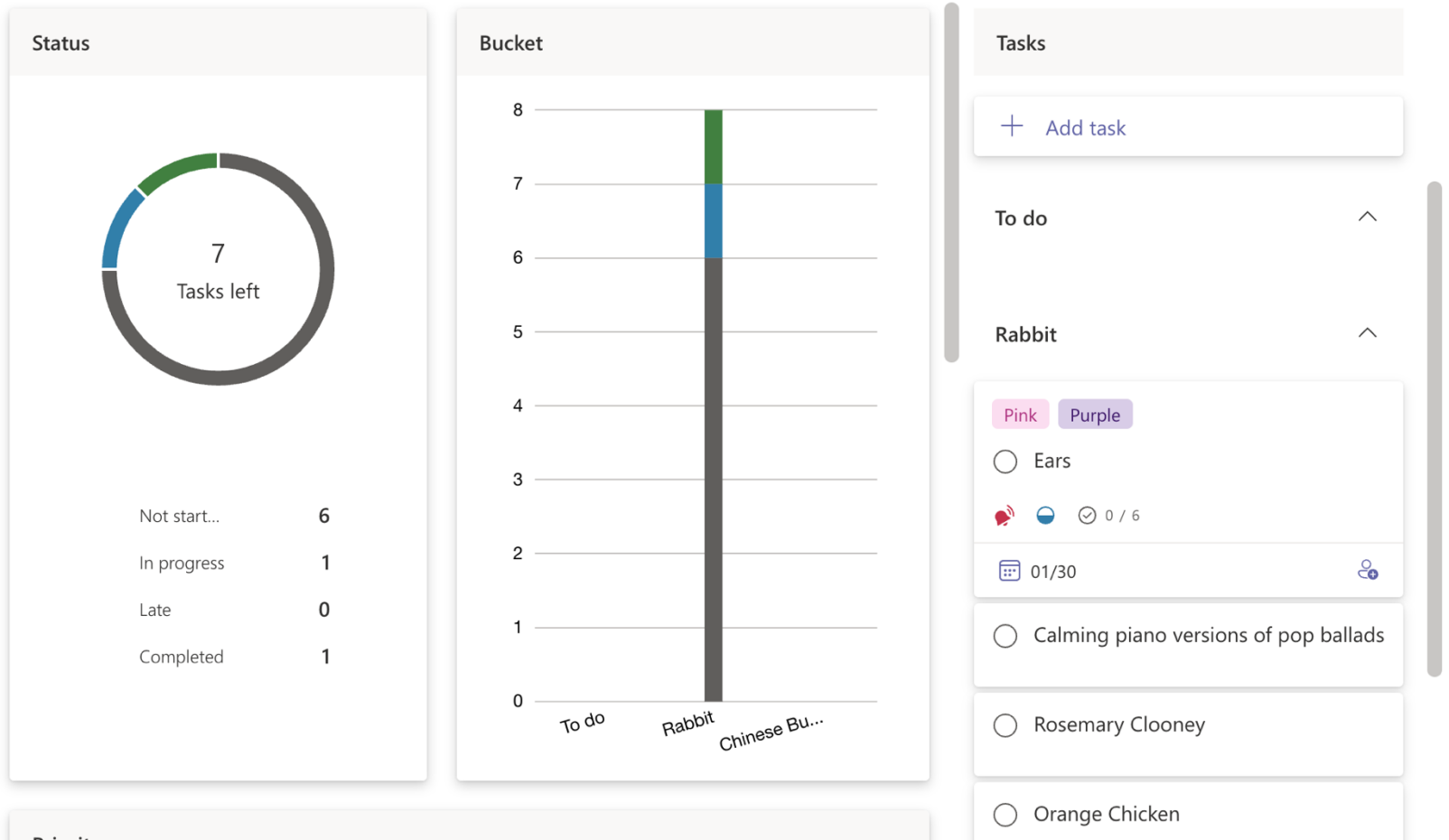
Filter by keyword

Filters

Group by Bucket

Using the reporting feature:

- Open Charts



Reporting

My Plans > **Test Plan** ▾

Grid

Board

Schedule

Charts



Share ▾



Filter by keyword

Filters ▾

Group by Bucket ▾

Using
completed
tasks:

To do

+ Add task

Rabbit

+ Add task

Orange Chicken

Soft Serve Ice-Cream

Billie Eilish

Bronze

Claws

Ouchie!

0 / 1

Completed tasks 1 ^

Questionable Sushi Even Though It's Japanese

GA Completed by Gomez, Antonio o...

Chinese Buffet

+ Add task

Disclaimer: Reporting is not
Planner's strong suit. Plan to
use more as a backup.



Section 2: We Do a Live Demo Together



Feel free to raise your hand or drop questions in the Q&A or Chat

What I Will Show You

- Live Demo
 - Add a Planner
 - Show Grid/Board/Schedule/Chart View
 - Create Bucket
 - Create Task
 - Go over each section
 - Rearrange Tasks
 - Show Completed Tasks
 - Show Filters
 - Show Search

What I Will Show You

- How Do I Use It?
 - Meeting to...
 - Group task to...
 - Reporting



Any final questions?



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Thank you!