



Office 365



Microsoft Planner

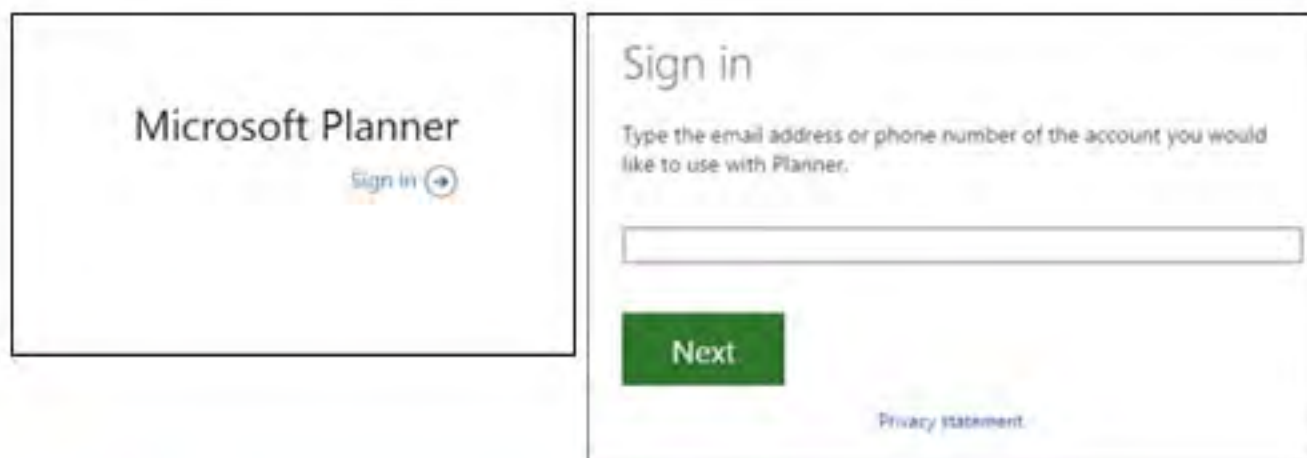


What is Microsoft Planner?

Microsoft Planner offers people a simple way to organize teamwork. Planner makes it easy for you and your team to create new plans, organizes and assign tasks, share files, chat about what you're working on, and get updates on progress.

Getting started with Planner

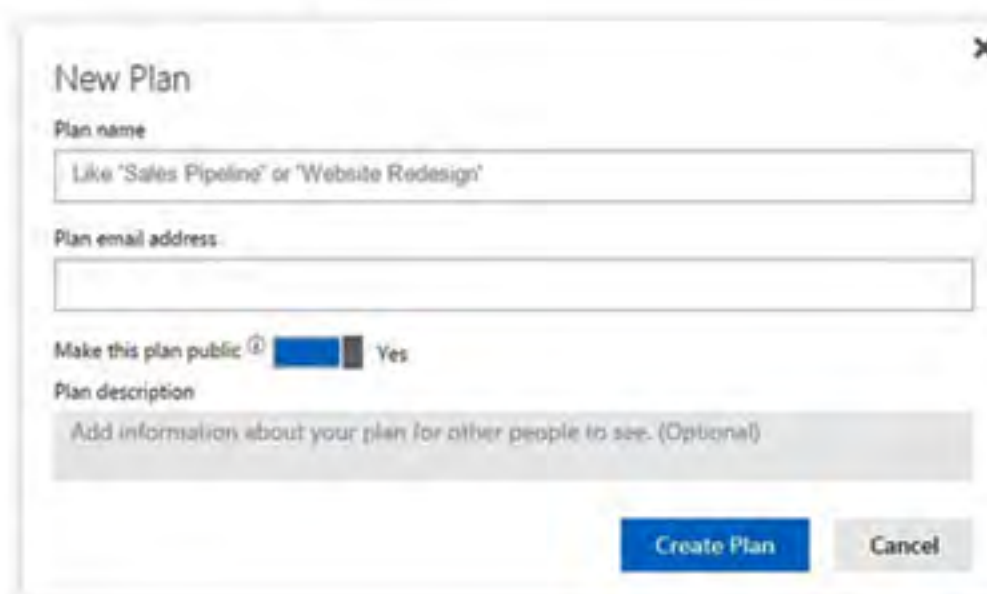
You can access Planner at tasks.office.com and your email credentials to sign in to Planner.



You can also access Planner by login to your email at: outlook.office365.com

STEP 1: Creating a Plan

Start a new plan by choosing New Plan.

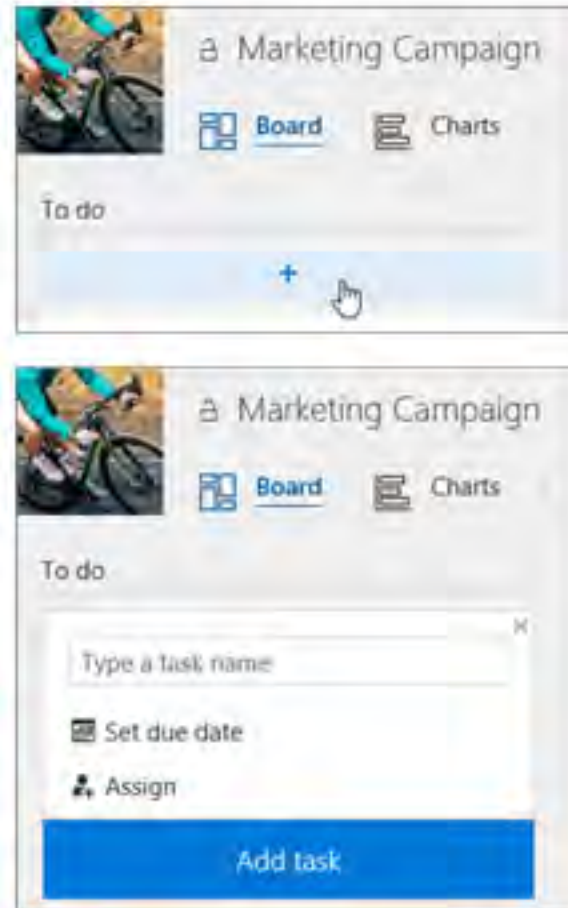


Once the new plan window pops up, give your plan a name and choose who can see it. You can also add a description to your plan. Once done, select **Create Plan**



STEP 2: Adding Tasks to a Plan

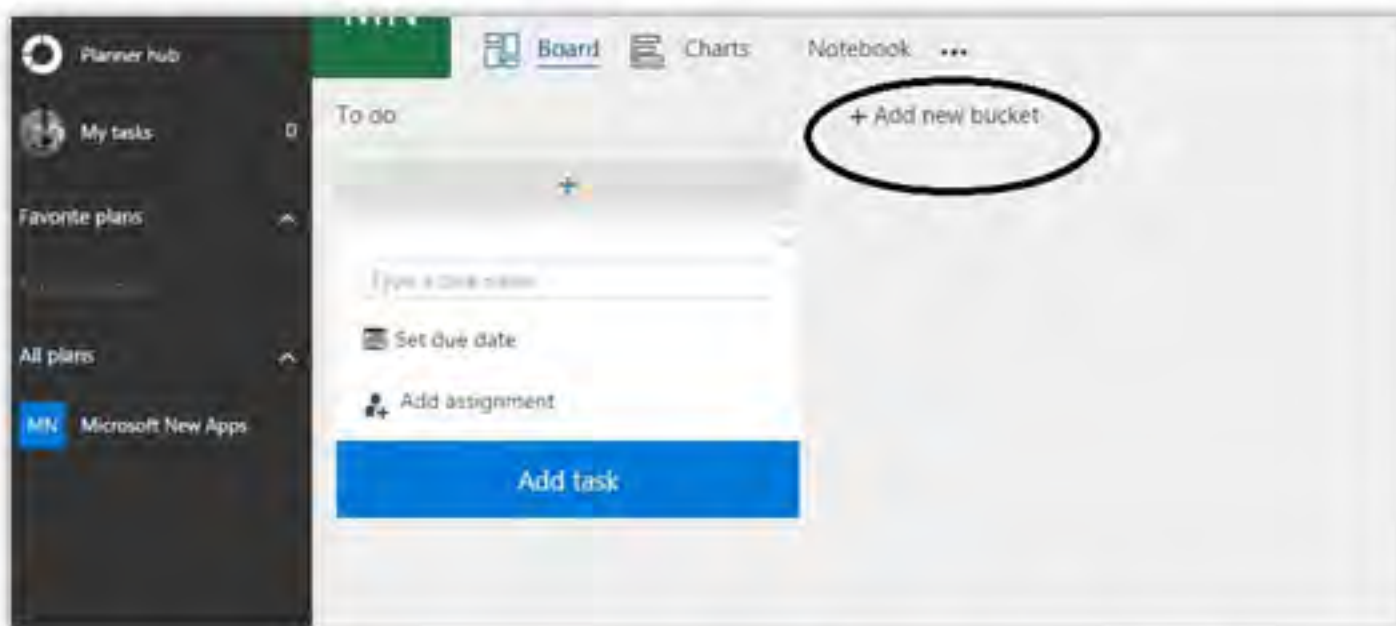
Once you've started a plan, you can add tasks to list what needs to get done. Click the **plus sign (+)** in the box under **To Do**, and then name the task. You can also set a due date and assign the task to a specific person. Once these details are given click **Add Task**.



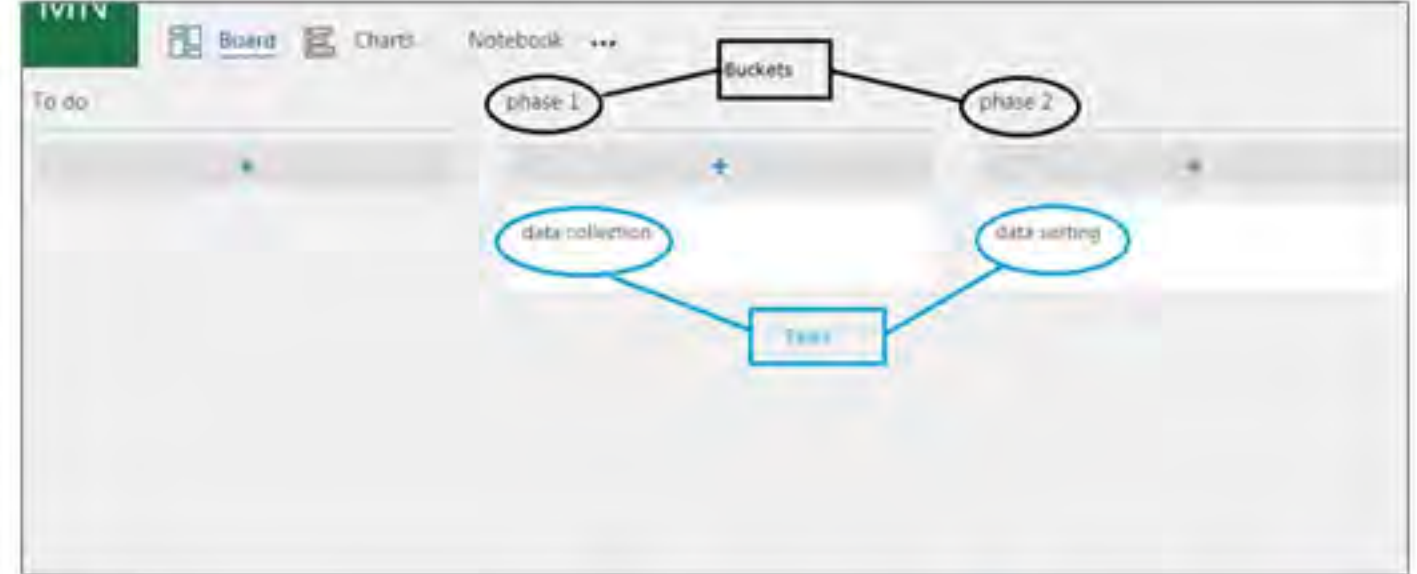
STEP 3: Creating Buckets

After adding tasks, you can sort them into buckets to help break things up into phases, types of work, departments, or whatever makes the most sense for your plan.

To set up buckets for your plan's tasks, on the Board, select **Add new bucket** and enter a name for the bucket.

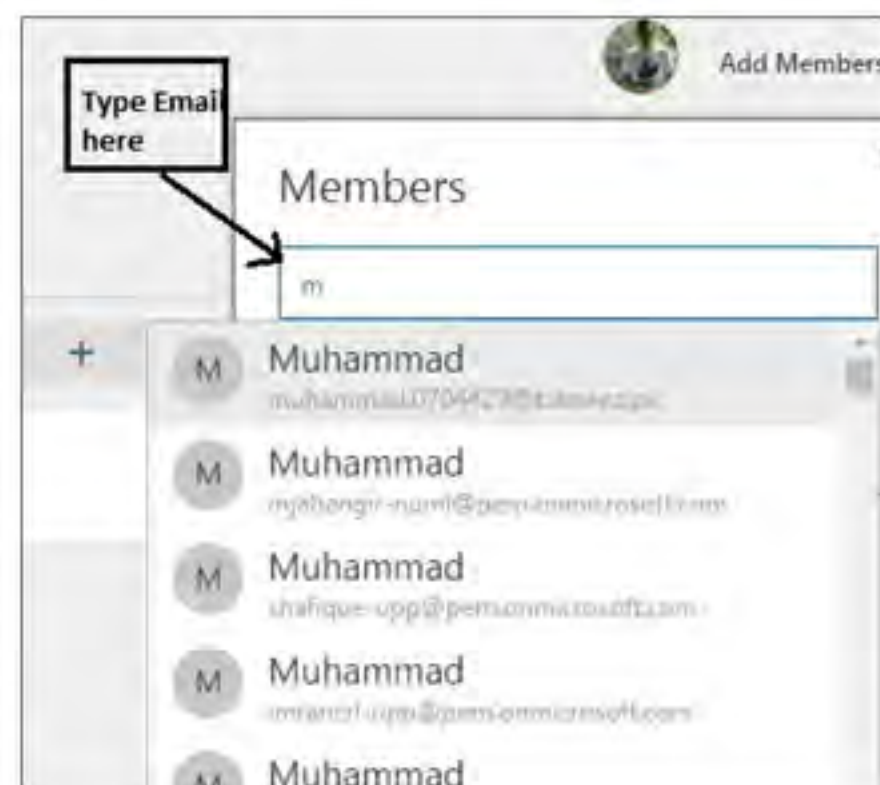
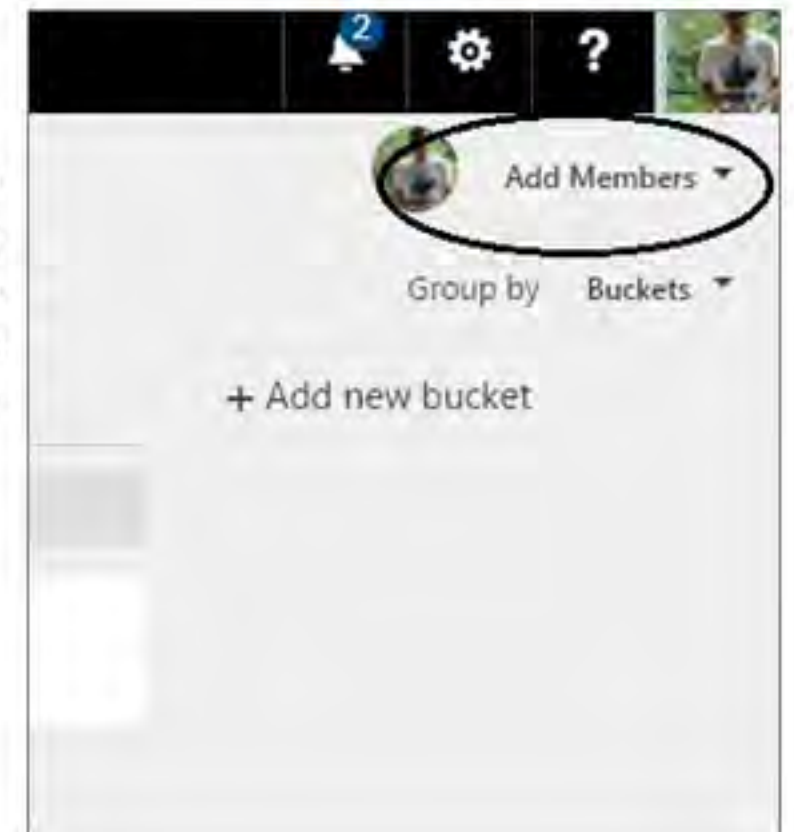


After adding a bucket to your plan, you can drag your tasks to that bucket giving your plan a shape. In the below example **phase 1** is the first bucket added in the plan with **data collection** as the task and **phase 2** is the second bucket with **data sorting** as the task.



STEP 4: Adding Members to the Plan

Planner allows you to add members to your plan by selecting **Add Members** tab which you can find at the right most upper corner of your plan.

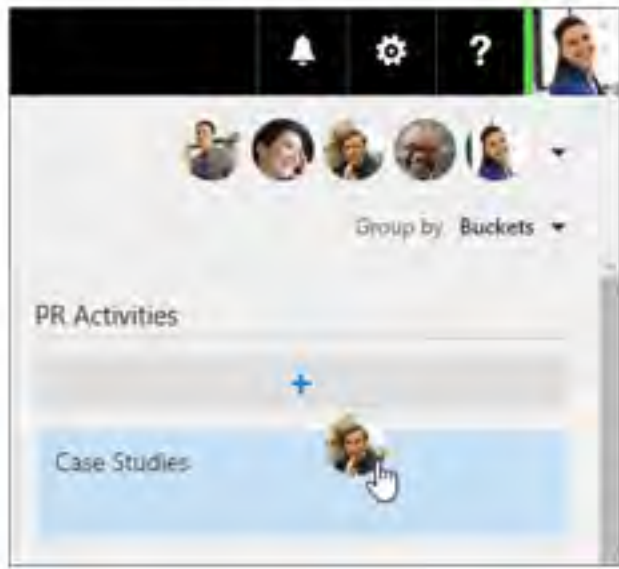


Once you select **Add Members**, type email as shown in the figure on left. Once you add these members here, you can assign tasks to them as per your plan.



STEP 5: Assigning Tasks to People

Once the members have been added to the plan, their photos will appear at the top right corner. A quick way to assign a task to a member is to drag the member's photo to that specific task as shown in the image below.

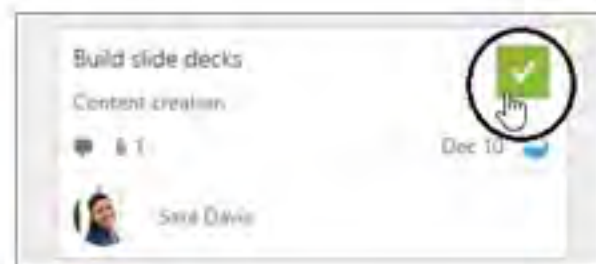
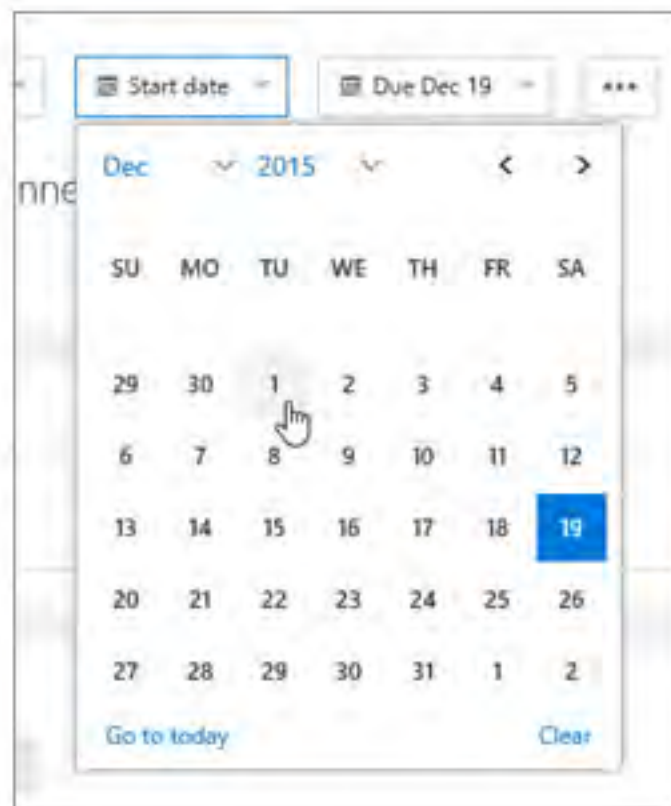


A task can only be assigned to one person. If you need to assign something to more than one person, consider making another task with a similar name, and assigning that task to the other person. If you need to reassign a task to another member select the name of the current assigned member on the task, and then choose a new person from the list.

STEP 6: Adding Dates to a Task

Planner also allows you to add **Start** and **Due** dates to your tasks. Start and due dates help give your plan some structure, so that your team knows what needs to happen when. Select a task to get to its details, and then add a **Start date** and a **Due date**.

Due dates are turned in **red** if the task is overdue. In the below image, the symbol next to the date shows that the task is in progress but its due date has passed. If no symbol is shown it means that the task has not yet started. If the task has been finished, the member needs to mark the task as completed by pointing to it and selecting the check mark.



STEP 7: Viewing Plan Progress

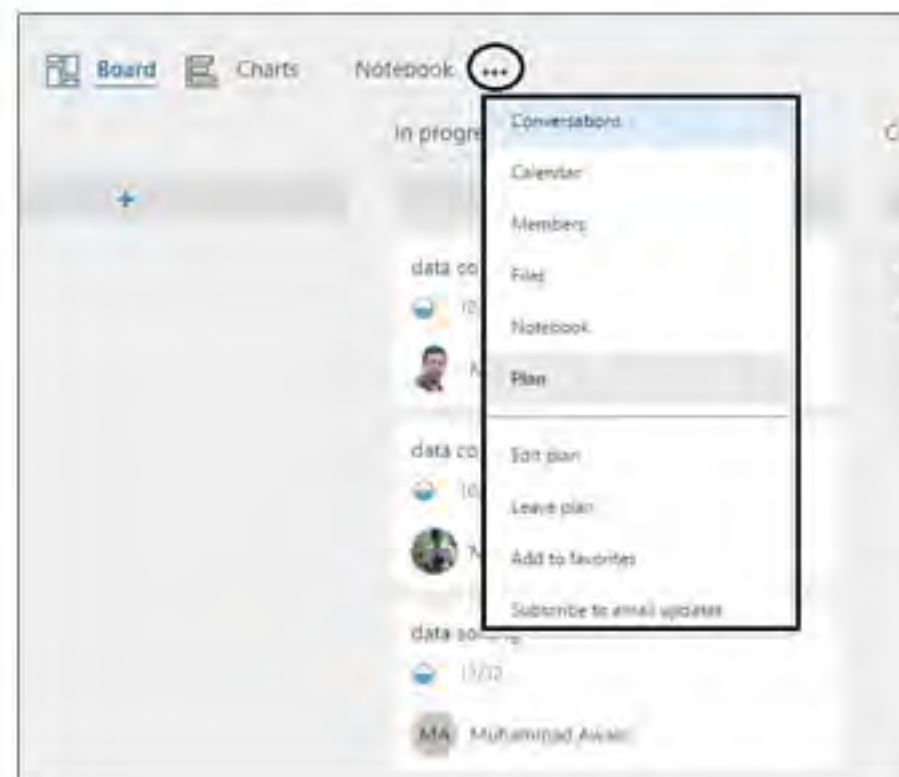
Planner allows you to view your plan progress by selecting Charts view that is located on the top left corner. A glance at Charts is all it takes to know where things stand and if the team is making enough progress towards their goal.



The bars on the Charts view show the number of tasks each person has in the plan, color-coded by progress.

Additional Features

Planner gives some additional features as shown in the image below:





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Conversations:

Allows to start new conversations with group members. When you select 'Start a Conversation', a new email tab is opened with all the group members of the plan as recipient.



Members:

Views members associated with your plan.



Files:

Allows to upload and access important documents related to your plan.



Notebook:

This feature syncs with Microsoft OneNote. OneNote allows to edit text, create tables, and insert pictures. Users do not need to explicitly save their work as OneNote saves data automatically as the user works. It also allows to share the notes with other users.



Edit Plan:

Allows to edit Plan name and description.



Leave Plan:

Allows a member to leave the plan. An admin can't leave the plan unless another member is promoted to admin.



Add to Favorites:

Add the current selected plan to Favorite Plans tab located at left most side.



Subscribe to Email updates:

Allows to subscribe emails related to plan.



Lahore University
of Management Sciences

For assistance, contact us:
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