Microsoft Planner
Getting Started Guide
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Introduction

Microsoft Planner is a planning and task management application available through Microsoft Office 365. With Planner, you can create plans for your projects where you may organize tasks and due dates. Each plan has its own board, allowing you effortlessly collaborate around tasks and view a comprehensive list of their status.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Access Microsoft Planner
- Create and edit a plan
- Create and edit buckets for your plan
- Create, assign, and edit tasks
- Change the view of your plan
- Mark tasks as complete
Accessing Planner

Planner can be accessed via Office 365 as well as through KSUmail. The following sections explain how to access Planner through Office 365 and KSUmail.

Accessing Planner via Office 365

The following explains how to access Planner through Office 365.

1. In an internet browser, navigate to https://o365.kennesaw.edu.
2. Enter your KSU email address and password (See Figure 1).
3. Click Sign in (See Figure 1).

![Figure 1 - Enter your KSU NetID](image)

Note: The Duo Authentication page will appear. Authenticate using your preferred device.

4. In the Search field, search for Planner (See Figure 2).
5. Click the Planner app (See Figure 2).

![Figure 2 - Searching for Planner](image)

6. Planner will open.
Accessing Planner via KSUmail

The following explains how to access Planner via KSUmail.

1. In an internet browser, navigate to http://ksumail.kennesaw.edu.
2. Enter your KSU email address and password (See Figure 3).
3. Click Sign in (See Figure 3).

![Figure 3 - Enter your KSU NetID](image)

**Note:** The Duo Authentication page will appear. Authenticate using your preferred device.

4. You will be taken into your email. From here, click the App Launcher, located at the top left of your browser window.

![Figure 4 - Click App Launcher](image)

5. Click All Apps.

![Figure 5 - Click All Apps](image)

6. Click Planner.

![Figure 6 - Click Planner](image)

7. Planner will open.
Creating a Plan

Plans allow you to organize tasks into buckets, add members to your project or tasks, assign tasks, and view their progress. The following explains how to create a plan.

1. From the Planner home page, click **New Plan**.

![Figure 7 - Click New Plan](image)

2. The **New Plan** window will appear. Here, several options are available when creating the plan:
   a. **Plan Name** – Enter the name for your new plan (See Figure 8).
   b. **Privacy** – Set the privacy of your plan to *Private* (See Figure 8).
   c. **Options** – Access the Group Description field where you can enter a description for members of the plan (See Figure 8).

![Figure 8 - New Plan](image)

3. When you have finished adding information to the plan, click **Create Plan**.

![Figure 9 - Click Create plan](image)
4. You will be taken to your new plan. The layout is as follows:
   a. **New Plan** – Allows you to create a new plan (See Figure 10).
   b. **Planner Hub** – Takes you to a page where you can view all of your plans (See Figure 10).
   c. **My Tasks** – Allows you to view tasks assigned to you (See Figure 10).
   d. **Recent Plans** – Displays a list of plans that you have recently accessed (See Figure 10).
   e. **Buckets** – View and create buckets. Buckets allow you to group and organize related tasks for your plan (See Figure 10).
   f. **Add Tasks** – Create a new task, create a due date for a task, or assign a task (See Figure 10).
   g. **Add New Bucket** – Create a new bucket within your plan (See Figure 10).
   h. **Board** – The primary view for Planner. Here you can view your plan buckets, filter tasks, or change how your tasks are grouped (See Figure 10).
   i. **Charts** – View the plan in chart format (See Figure 10).
   j. **Schedule** – View the plan in calendar format (See Figure 10).
   k. **More Options** – Displays additional options and access plan settings (See Figure 10).
   l. **Members** – View and add members to the plan (See Figure 10).
   m. **Filter** – Filter the plan by due date, assignment, bucket, etc (See Figure 10).
   n. **Group By** – Group the plan by bucket, assigned to, progress, etc (See Figure 10).

![Figure 10 - The Plan Layout](image-url)
Adding Members to the Plan
The following explains how to add members to a plan.

1. From Planner, click the Plan that you wish to add members to.

![Figure 11 - Click the plan](image)

2. Click the Members drop down.

![Figure 12 - Click the Members](image)

3. Enter the name or NetID of the person that you wish to add in the Name field (See Figure 13).

4. Select the person that you wish to add to the plan (See Figure 13).

![Figure 13 - Adding members](image)
Removing Members from Plans
In the event that you wish to remove members from a plan, you may do so. The following explains how to remove members from a plan.

1. From the plan, click the Members drop down, located at the top of the window.
2. Hover your mouse over the member that you wish to remove.
3. Click the More Options button (See Figure 14).
4. Click Remove (See Figure 14).
5. The member will be removed from the plan.

Creating Buckets and Tasks
Buckets are groups of related tasks that allow you to break up your plan into phases, types of work, departments, or other categorizations as appropriate. With these buckets, you can create and group tasks. The following explains how to edit and create buckets in Planner.

Renaming the To Do Bucket
When creating a plan, by default you will be presented with at To Do bucket. You may keep this bucket as is, or you can rename the bucket to something more relevant to your plan. The following explains how to rename To Do bucket.

1. From your plan, hover your mouse over the To do bucket.
2. Click the More Options button that appears (See Figure 15).
3. Click Rename (See Figure 15).
4. Type the new **name** for the bucket and press *enter* on your keyboard.

![Figure 16 - New Bucket Name](image)

**Creating Tasks within a Bucket**

For each bucket, you may create new tasks and due dates, as well as assign tasks to members. The following explains how to create a task within a bucket.

1. From your plan, click the **add a task** button.

![Figure 17 - Add a task](image)

2. Type the **name** of your task in the *Enter a task name* field.

![Figure 18 - Enter a task name](image)

3. To set a **due date** for a task:
   a. Click **Set due date** (See Figure 19).
   b. Click the **date** that you wish to set a due date for (See Figure 19).

![Figure 19 - Setting Due Dates](image)
4. To assign a task to a member of the plan:
   a. Click **Assign** (See Figure 20).
   b. Click the name of the member you wish to assign the task to (See Figure 20).

   ![Figure 20 - Assigning a task]

   **Note:** You may also add people by typing their names and emails into the *Type a name or email address* field. If the person you are assigning the task to is not already a member of the plan, they will be added.

5. To add members to already existing tasks:
   a. Click **More Options**, located by the task you wish to add members to (See Figure 21).
   b. Click **Assign** (See Figure 21).
   c. Click the **name** of the member you wish to assign the task to.

   ![Figure 21 - Adding Members to a Plan]

   ![Figure 22 - Assigning a Task]
6. When you have finished creating your tasks, you can rearrange them as necessary. To do so, click and drag the task to its desired position.

![Figure 23 - Reorganizing tasks](image)

7. To mark a task as complete:
   a. Hover over the task that you wish to mark as complete (See Figure 24).
   b. Click the Complete Task button (See Figure 24).
   c. Your task will be marked as complete. You can view your completed task(s) by clicking the Show completed tab.

![Figure 24 - Completing a task](image)

### Adding Additional Details to a Task

Within each task, you may add additional information such as a start date, description, comments, attachments, etc. The following explains how to add additional details to a task.

1. In your plan, click the task that you wish to edit.

![Figure 26 - Click the Task](image)
2. The *Task Details* window appears. The layout for the *Task Detail* window is as follows:
   a. **Assign** - View and add members to the task (See Figure 27).
   b. **Bucket** – Change the bucket that the task is assigned to (See Figure 27).
   c. **Progress** – Set the progress of the task as *Not Started* or *Completed* (See Figure 27).
   d. **Start Date** – Set the start date for the task (See Figure 27).
   e. **Due Date** – Set the due date for the task (See Figure 27).
   f. **Description** – Enter a description for the task (See Figure 27).
   g. **Checklist** – Add checklist items related to the task (See Figure 27).
   h. **Add Attachment** – Add files to the task (See Figure 27).
   i. **Comments** – Enter comments for the task (See Figure 27).
   j. **Send** – Save the comments for the task that you’ve made (See Figure 27).

---

**Figure 27 - Task Details**

<table>
<thead>
<tr>
<th>Bucket</th>
<th>Progress</th>
<th>Start Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documentation</td>
<td>Not started</td>
<td>03/11/2019</td>
<td>04/12/2019</td>
</tr>
</tbody>
</table>

**Description**
Create a one page quick guide for the software

**Checklist 0/3**
- [ ] Write documentation
- [ ] Review document
- [ ] Revise document
- [ ] Add an item

**Attachments**
- **Add attachment**

**Comments**
We will need to have this done by the 12th

**Send**
3. When you have finished editing the task, click the **Close** button.

![Quick Start Guide](image)

**Figure 28 - Click Close**

**Creating New Buckets**

With each plan, you have the ability to organize related tasks into separate buckets. This allows you to better organize your plan. The following explains how to add additional buckets within Planner.

1. From the plan, click **Add new bucket**.

![Add new bucket](image)

**Figure 29 - Click Add new bucket**

2. Enter the name of your new bucket.

![Enter a new bucket](image)

**Figure 30 - Enter a new bucket**

3. The new bucket will be created.

![New bucket](image)

**Figure 31 - New bucket**
Changing Views
You may change the view of your plan by using various filters and grouping options. The following explains how to utilize filters and grouping to adjust your view.

Applying a Filter to a Plan
The following explains how to apply a filter to a plan.

1. Navigate to the plan that you wish to view.
2. Click Filter, located at the top of the window.

3. Select the filter that you wish to apply. For instance, you can filter by due date, labels, who a task is assigned to, and by bucket.

4. Your filter will be applied. To close the filter menu, click Filter.

5. To remove a filter:
   a. Click Filter.
b. Click **Clear**.

![Figure 36 - Click Clear](image)

6. To close the filter menu, click **Filter**.

![Figure 37 - Click Filter](image)

**Changing Your Board View Using Grouping Options**

You may also adjust your board view by adjusting how tasks are grouped. The following explains how to do so.

1. Navigate to the plan that you wish to view.
2. Click **Group by**, located at the top of the window.

![Figure 38 - Click Group by](image)

3. Select your preferred grouping. For instance, you may view your board by **bucket**, who tasks are **assigned to**, task **progress**, **due dates** as well as by **labels**.

![Figure 39 - Select a preferred grouping](image)
4. Your view will be changed based on your selection

![Change Group View](image)

**Figure 40 - Changed Group View**

**Additional Help**

For additional support, please contact the KSU Service Desk:

**KSU Service Desk for Faculty & Staff**

- **Phone:** 470-578-6999
- **Email:** service@kennesaw.edu
- **Website:** [http://uits.kennesaw.edu](http://uits.kennesaw.edu)

**KSU Student Helpdesk**

- **Phone:** 470-578-3555
- **Email:** studenthelpdesk@kennesaw.edu
- **Website:** [http://uits.kennesaw.edu](http://uits.kennesaw.edu)