

KEVIN O'NEILL

OFFICE 365 – Planner Introduction

The following is a quick introduction guide in regard to the Office 365 planner application.

- 1) After logging into ones account via <https://portal.office.com/> the Planner icon was selected:



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2) If prompted click Sign in:

Microsoft Planner

Sign in 

3) Enter in the e-mail to be associated with the planner then click the Next button:

Sign in

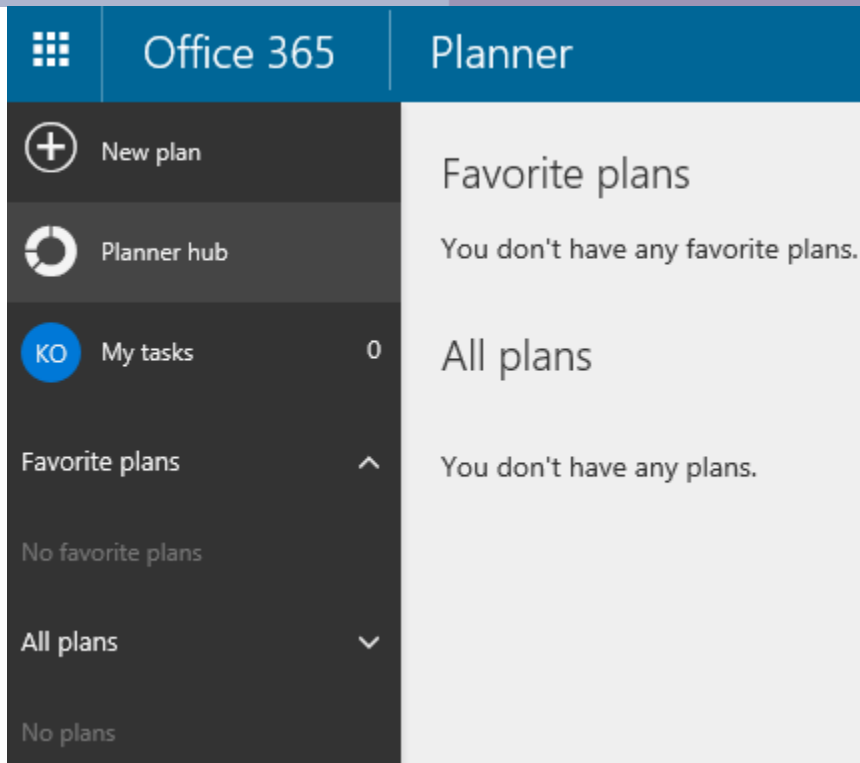
Type the email address or phone number of the account you would like to use with Planner.

Type your email address or phone number

Next

4) Click New plan:

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- 5) Enter in a Plan name and Plan email address. By default under Make this plan public the selector is set to Yes – move it to the left to set it to No. Enter in a Plan description – then select Create Plan:

New Plan ✕

Plan name

Plan email address

Make this plan public ⓘ Yes

Plan description

Create Plan

Cancel

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An example set once filled in:

New Plan ✕

Plan name

 ✓

Plan email address

 ✓

Make this plan public ⓘ No

Plan description

[Create Plan](#) [Cancel](#)

6) The task screen – then looks as such:

KT KMO Test

[Board](#) [Charts](#) | [Notebook](#) ...

To do + Add new bucket

[+](#)

✕

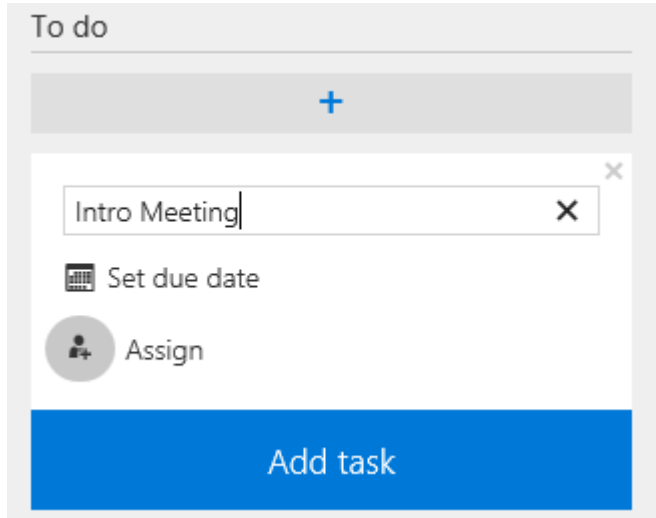
[Set due date](#)

[Assign](#)

[Add task](#)

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- 7) Where it says Type a task name – enter in the desired task then click Add task:



To do

+

Intro Meeting

Set due date

Assign

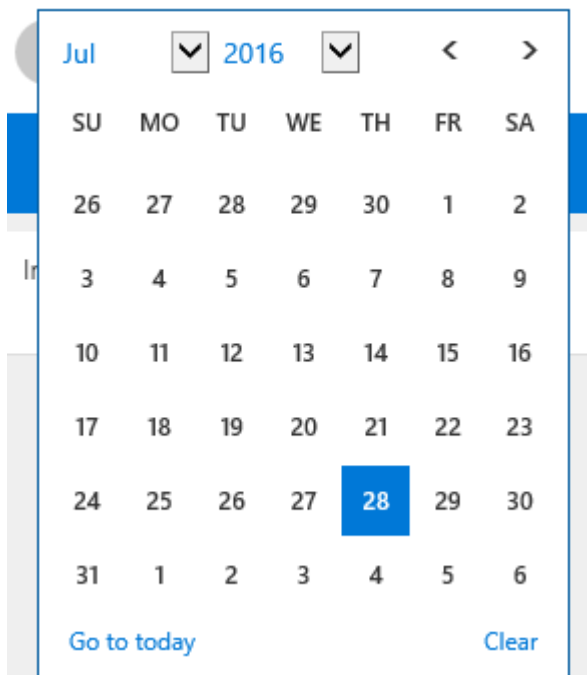
Add task

- 8) Click Set due date:

Set due date

then select a desired date:

Set due date



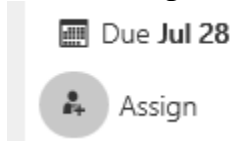
Jul 2016

SU	MO	TU	WE	TH	FR	SA
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

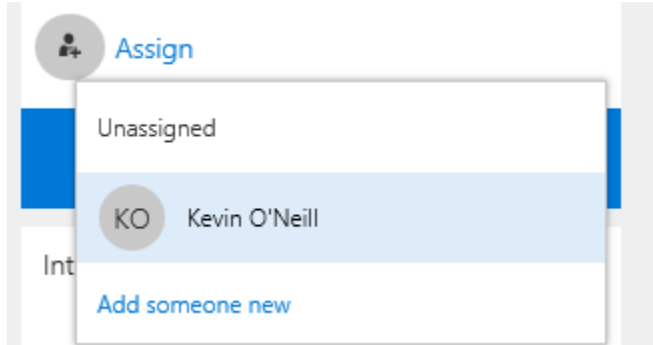
Go to today Clear

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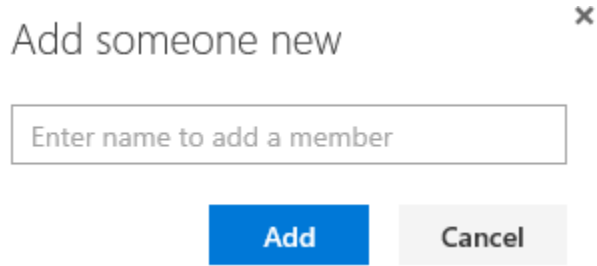
9) Click Assign:



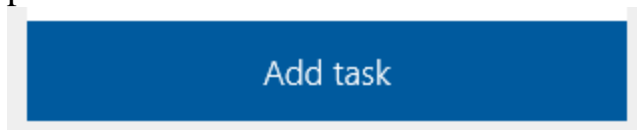
10) Select the desired individual from the list or click Add someone new and enter in their information:



11) When Add someone new is clicked – users can be entered by name then Add selected:



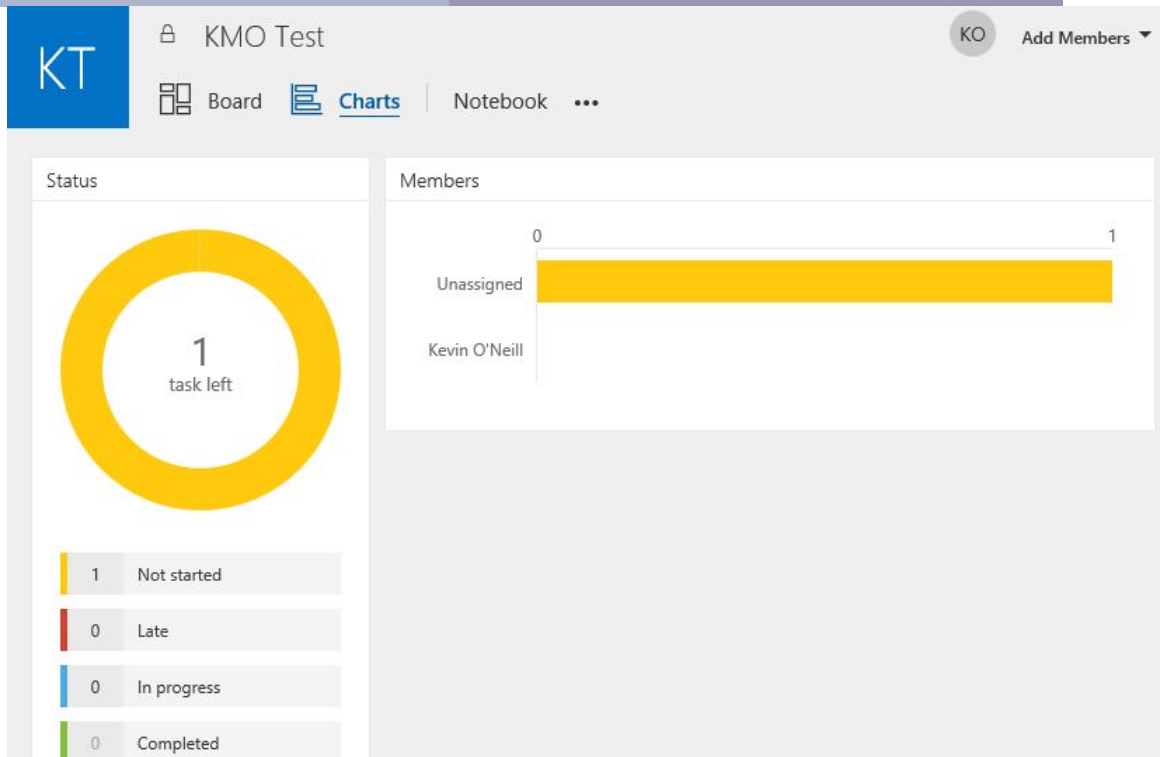
12) Click the Add task button – so that the item is added to the plan:



These steps would be repeated for each task to be added and assigned.

13) Once the tasks are added they can be viewed in a graphic depiction by clicking the Charts selection:

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14) Scrolling over the bar graph – displays the tasks Unassigned and Not started:



15) One useful item is that on the left hand side – clicking My Tasks shows all the tasks Not Started, In progress and Completed:

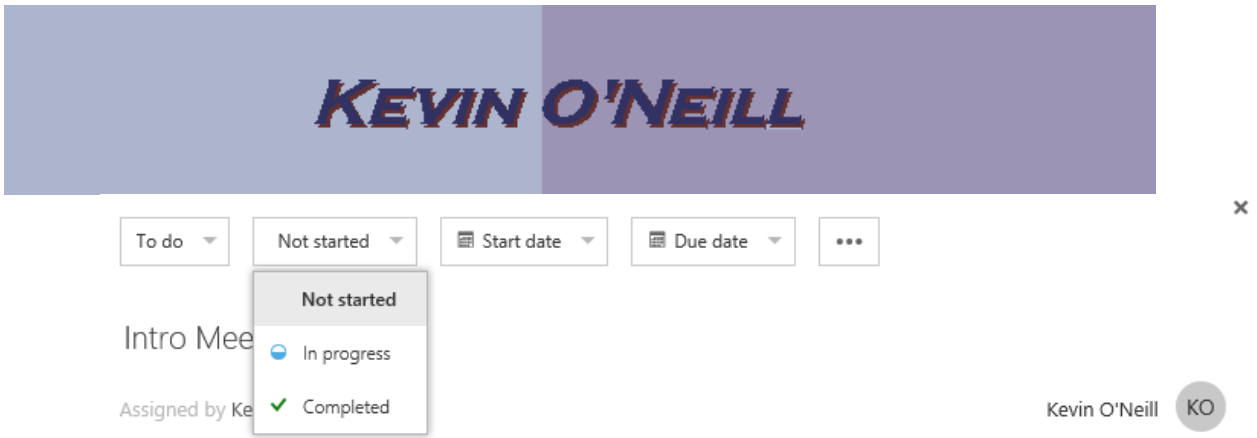
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The screenshot shows the Office 365 Planner interface. At the top, there's a blue header with 'Office 365' and 'Planner' on the left, and a logo on the right. Below the header is a dark sidebar with navigation options: 'New plan', 'Planner hub', 'My tasks' (selected), 'Favorite plans', 'All plans', and 'KMO Test'. The main area is titled 'My tasks' and has a circular profile icon 'KO'. It features three columns: 'Not started', 'In progress', and 'Completed'. Under 'Not started', there are two task cards. The first card is titled 'Intro Meeting' with a sub-label 'KMO Test', assigned to 'Kevin O'Neill'. The second card is titled 'Training' with a sub-label 'KMO Test', assigned to 'Kevin O'Neill', and has a due date of 'Jul 29'.

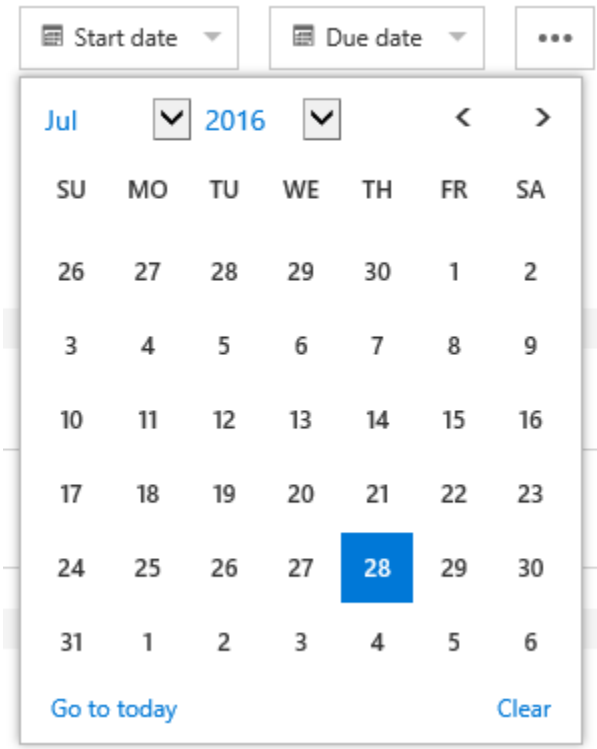
16) Clicking one of the tasks:

This screenshot shows the detailed view of a task titled 'Intro Meeting'. At the top, there are filter buttons: 'To do', 'Not started', 'Start date', 'Due date', and a 'Delete' button. The task title 'Intro Meeting' is prominently displayed, followed by 'Assigned by Kevin O'Neill on Jul 29' and the assigner's name 'Kevin O'Neill' with a profile icon. Below this is a 'Description' section with a text input field and a 'Set as preview' checkbox. The 'Attachments 0' section contains 'Attach' and 'Link' buttons. The 'Checklist' section has an 'Add an item' button and a 'Set as preview' checkbox. On the right side, there is a vertical stack of colored bars representing different task categories.

17) This shows where the Not started can be clicked:



18) This shows the options when Start date is selected:



19) This shows what the Due date options are:

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Due date ▾ ...

Jul ▾ 2016 ▾ < >

SU	MO	TU	WE	TH	FR	SA
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Go to today Clear

20) This shows the Delete option:

To do ▾ Not started ▾ Start date ▾ Due date ▾ ...

Intro Meeting

Delete

21) The task can be changed by clicking into it – then changing the text as desired:

Intro Meeting

Assigned by Kevin O'Neill on Jul 29

22) Enter in a description:

Description Set as preview

This is a test

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23) To add an attachment – click Attach:

Attachments 0

 Attach

 Link

Then select Browse OneDrive or Upload a file – browse out to the location where the file is located – then select it – then click OK:

 Attach



Browse OneDrive

Upload a file

24) Click the link button to add a URL:

Attachments 0

 Attach

 Link

25) Enter in the desired Address and Text to display for the said item– then click Save:

Address



Type the link and press Save

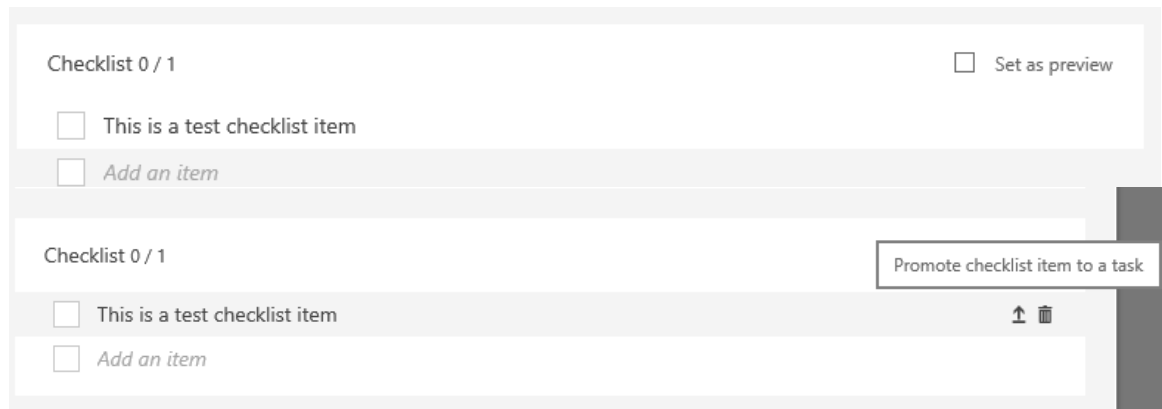
Text to display

Enter the display text for the link

Save

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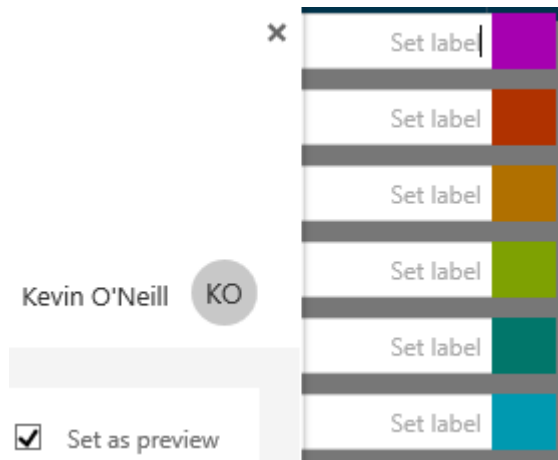
26) Clicking Checklist displays the following:



27) To add a comment about the task – enter in the text then click Post:



28) Labels are useful to add a text reference to an item that is then color coded. Click into Set label and add some short text about that said item:



The label then appears with that text and can be clicked for easy reference:

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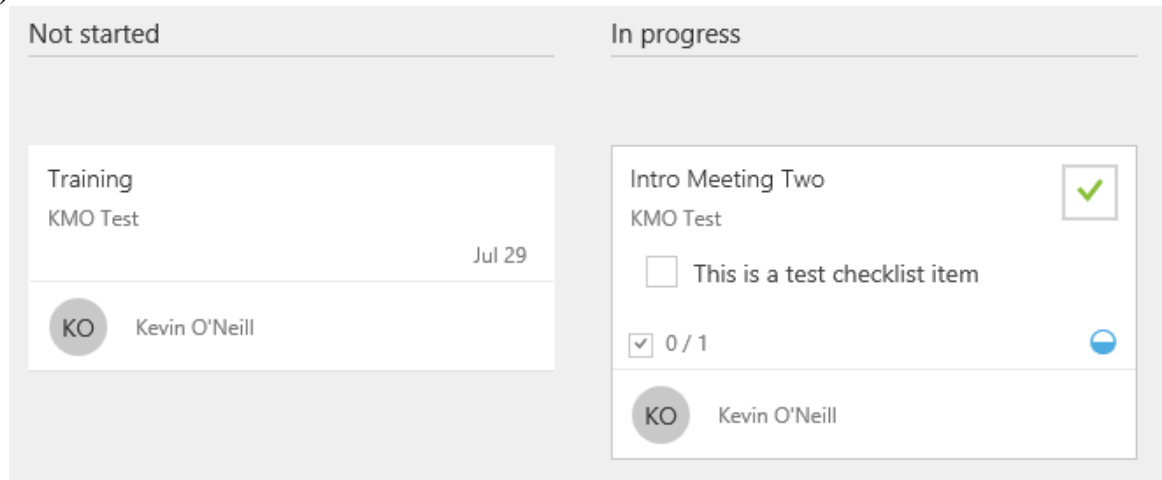


This step would then be repeated for each item that a Set label is to be set with.

29) When done click the x for Dismiss:

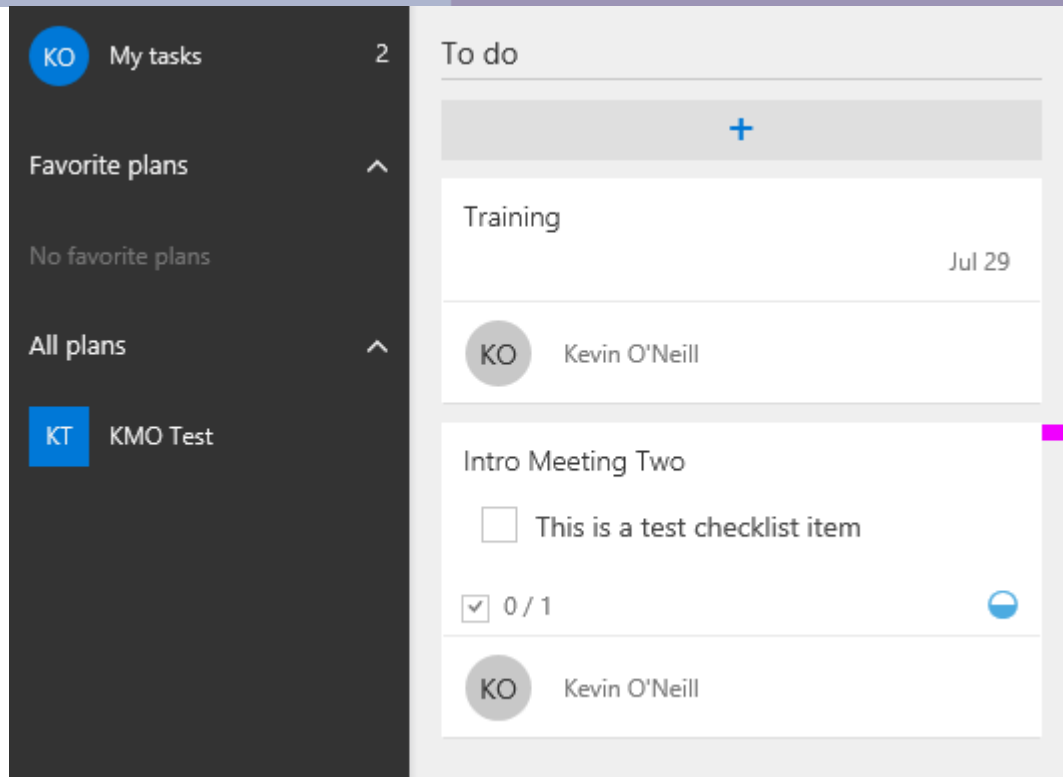


30) Tasks can then be viewed:

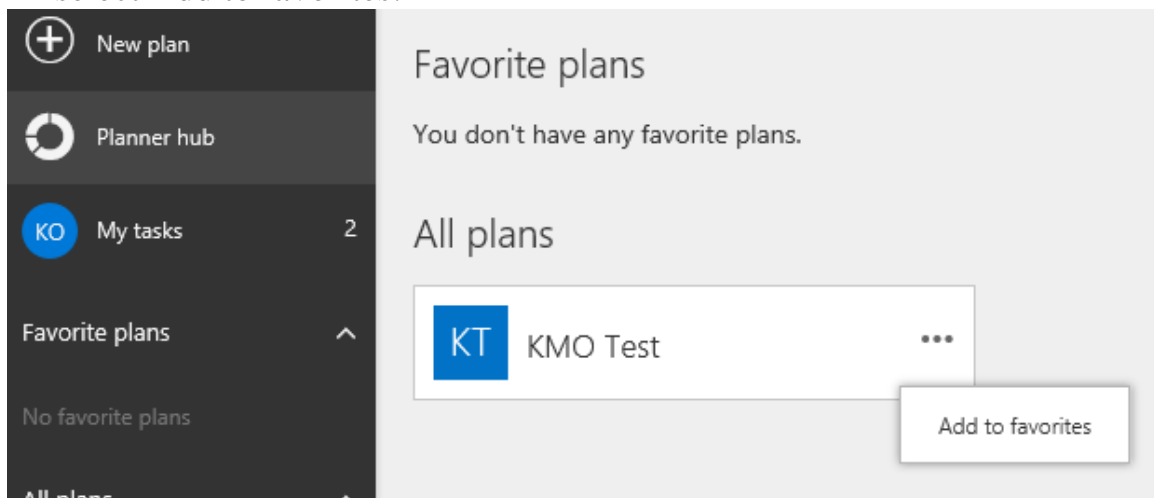


31) On the left hand side clicking under All Plans the desired plan displays the Tasks on the right hand side:

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32) As more plans are added – on the left hand side then can be viewed by clicking the Planner hub – and if desired click the ... then select Add to favorites:



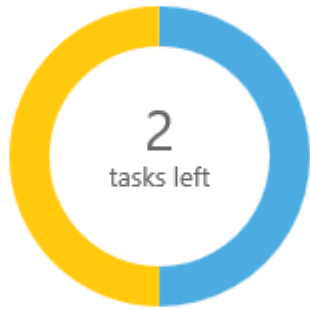
33) Then the plan then displays as ones favorite:

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Favorite plans

KT

KMO Test



1 day left



- 34) To save screen space – on the left hand side the Collapse this menu can be selected:

