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Microsoft Planner: how to organise tasks with your team

Planner is a simple board for tracking who is doing what. Tasks sit on cards in columns, a bit like sticky notes on a wall. It suits small projects, rotas, event planning and anything where a shared to-do list helps.

Microsoft has been merging Planner with other task tools, so names and screens may look different on your account. The ideas stay the same.

Open Planner

Sign in to Microsoft 365 in your browser, click the app launcher (the grid of dots) and choose **Planner**. In Teams, you can also find it by clicking **Apps** on the left, or as a tab in a channel. Ask us if you cannot find it.

Make a plan

1. Click **New plan** (or the + button).
2. Give it a name, such as Spring Open Day.
3. Choose whether it is private or visible to your team, if asked, and click **Create**.

Add columns (buckets) and tasks

- **Buckets** are columns, such as To do, Doing and Done. Click **Add new bucket** to add one.
- Click **Add task**, type what needs doing, and press Enter.
- Click a task to open it. You can:
 - **Assign** it to one or more people.
 - Set a **Due date**.
 - Add a **Checklist** of smaller steps.
 - Add **Notes** and attach files.

Move work along

Drag a task card from one bucket to the next. When it is finished, open the card and mark it **Complete**.

Different views

Along the top you can switch between the **Board**, a **Grid** list, a **Schedule** calendar and **Charts** that show progress. Which of these appear depends on your version.

Invite people

Click the **people icon** or **Members** and add names. They can then see and change tasks.

Tips

- Keep task names short and clear, starting with a verb, such as 'Book room'.
- Review the plan weekly so it does not go stale.

Common problems

- **I cannot find my plan:** look under **Recent** or **Shared with me**.

When to get more help

If you are deciding between Planner and a bigger tool, or need help setting up for a team, contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.