






Office 365 Planner F.A.Q.

We hosted a webinar on [Office 365 Planner Best Practices](#) and had the highest turnout we've ever experienced. Typically, there are handful of questions from audience but this time around, there were pages. Since there is so much excitement around Planner, we figured we'd create a resource to answer questions from Planner users themselves.

As Office 365 Planner is still very new, there are many questions that result in "no, not currently". Microsoft is currently looking for suggestions to improve the product so we highly recommend you provide your suggestions at: www.planner.uservoice.com.

Quick Access

 Creating Plans & Tasks	01-03
 Reporting and Views	03
 Integrations	04
 Planner Best Practices	04
 Features Coming Soon	05

Creating Plans & Tasks

Are Tasks created in your Outlook task list integrated with Planner?


No—tasks created in Outlook are not correlated or integrated with tasks created in Planner.

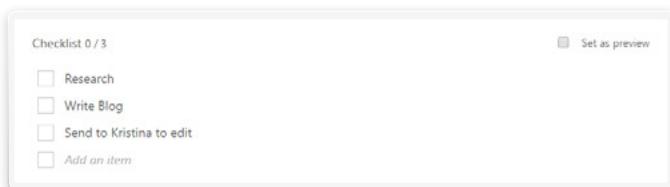
Can you create a template for all new plans - buckets and basic list of tasks?

Not currently but a work-around could be to send your team a screenshot of a sample plan and indicate that it is mandatory to populate all fields.

This feature is currently in development. For more information, see the [Product Roadmap for Office 365 Planner](#).

Can you enter a dependency to a task? I.e. Someone else must complete a task before you can start yours.

No but you can design the task so that the last task is to pass the next step to whomever is required to carry on the next task. 



Can we set a start/due date to be dependent on the completion of a previous task?


No, this is not currently available.

After you have completed a board, how do you archive or age that information so the plans don't continue to exist after they have been completed?

Currently it is not possible to archive plans once they have been completed. You can either delete them, remove yourself from the plan (if you are not the administrator), or do nothing and simply remove from your favorite plans.

Keep in mind that deleting plans will also delete the group which contains files, conversations and other data related to the plan. If you are set on deleting the plan, save critical files and information from the group to another location. Once a plan has been deleted, it cannot be recovered.

Is there any way to email only the person assigned to your task? Sends to everyone right now.

Unfortunately, no – notifications in Planner are limited at the moment. You will receive notifications when: a new plan is created, members are added, tasks are assigned, tasks are completed, or someone comments on a task. 

+ Creating Plans & Tasks

Can you assign a task to multiple people?

Not currently but it is on the product roadmap and in development!

Can we create mandatory items in a checklist within a task?

No, but you can simply indicate that the item in the checklist is mandatory.

Can you group tasks together? A task with sub-tasks...

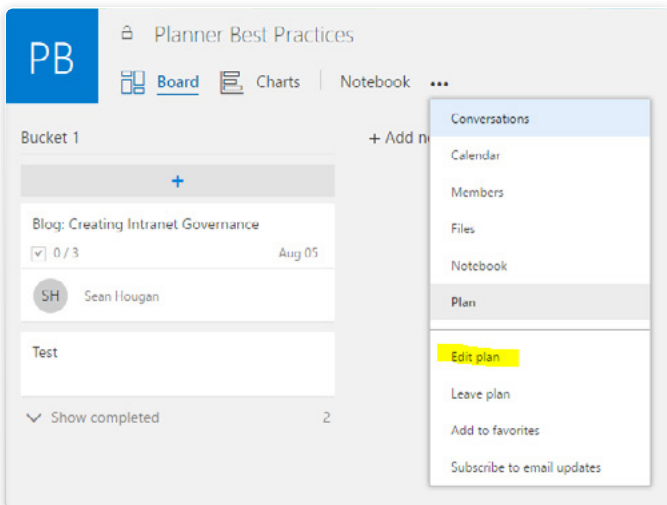
You cannot group existing tasks together but you can create a checklist within a single task. The checklist items serve as subtasks or to-do's. To do so, create a task and then click to open up the task detail box. Here you can add a checklist or your sub-tasks.

Can you assign a task to multiple people?

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How do you delete a plan?

Only Plan administrators can delete a plan. If you have this privilege navigate to the more icon within your plan (beside "Notebook"). Within the more dropdown, select "edit plan". Within this pop-out, click delete plan. Remember, when you delete a plan, the entire O365 Group is also deleted. ▼



If someone is not a member of the group joins while it is public, what happens if it then becomes private?

The new member remains part of the Plan. When a plan is converted from Public to Private, all existing members >

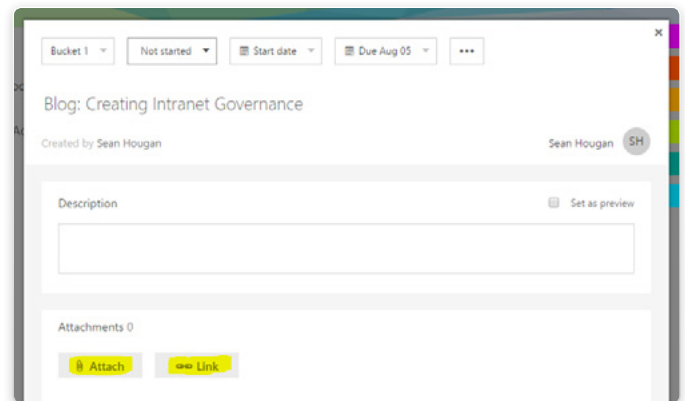
remain part of the plan. The major consequence of this change is that the plan is no longer visible to non-members of the organization.

Can we create a task from an email via drag and drop or by any other method?

No, this is currently not possible.

I have a file in my Plan folder that I'd like to attach to a task. How?

Once you have created a task, click on it within the bucket. A box will open with options to attach documents and links. You can upload files from your desktop or OneDrive. Alternatively, you can attach your file from your Plan Folder via a link. To do so, right click the file and select "Get a Link". ▼



Can members of a plan be external to your company?

No, not currently but it has been built into the roadmap. When developed, Office 365 Planner will support task assignment and collaboration with team members who are not a part of the tenant.

How can I create personal flag? Not the global flag.

This is not yet possible. You may favorite Plans but you may not flag individual tasks. Use the Assigned To view or My Tasks to filter your tasks and isolate them from others'.

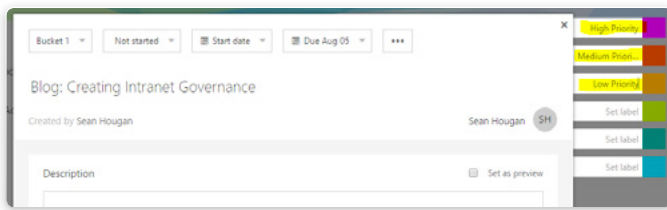
Is there a way to see tasks assigned to members across multiple plans? For example, if you are a manager and there are multiple plans and you want to see what has been assigned to a specific employee to ensure they aren't overloaded.

No, there is currently not a view for this. Although, users can see all tasks assigned to them across multiple plans and which are not started, in progress and completed.

+ Creating Plans & Tasks

How do you use the colored tabs?

Before using the colored tabs which can be accessed within any task, it is important to define what the different colors mean. This can be edited by clicking on a task and hovering over the tabs and editing the text. It is up to you and your team to decide how you will want to mark tasks. Common use cases are to use colored tabs to indicate high and low priorities or task owners. ✓



Can you move a task from one plan to another?

No, not currently. You will have to recreate the task in the other plan.

Can you track the time spent on a task for billing purposes?

No. Time tracking for billing purposes is not part of Planner.

Reporting and Views

Is there a way to create custom reports in Excel or some similar tool to show status or progress on Plans?

No, you only have the reporting feature in Planner to obtain an overview of progress. Planner does not currently have the option to export data to Excel.

Is there a view that will allow us to see tasks by estimated time of completion?

This is a great idea! This view is not currently available but you can suggest it at www.planner.uservoice.com.

Can we export to excel or pull reporting from this at all?

No.

Are there any reporting features built in? We need a tool to track this information in a central location, to see what plans are on schedule, or to identifying bottlenecks within a plan? >

Do People get an email when new task is moved to In-Progress?

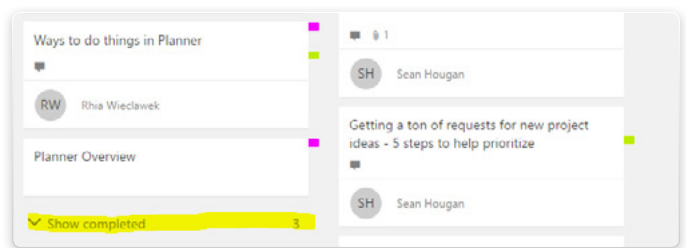
No, only when a new task is created, assigned to a team member, or a task is completed.

How do you create a group for a specific plan?

This happens automatically! When you create a new plan, a corresponding group is simultaneously created and any members you add to the plan will be added to the group.

How long after tasks are completed to they remain in the chart? If our plan is revolving and we only want to see what is late, in progress or on time can we hide the completed tasks?

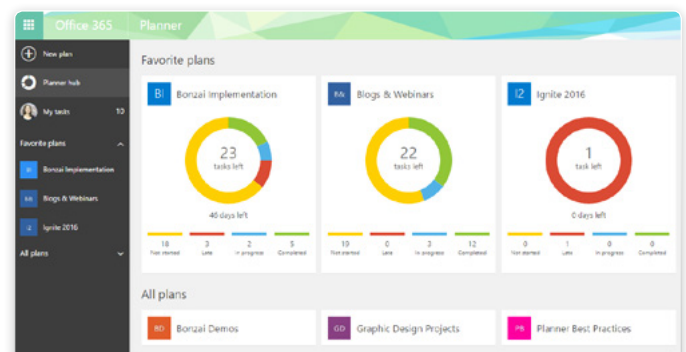
Completed tasks will remain in the chart view of the Plan until the plan has been deleted. Within your Plan Board, completed tasks will be hidden once marked as complete. ✓



In your Planner Hub under "Favorite Plan" you will be able to view a dashboard of the plans you have favoured.

For each plan, this view will indicate the number of task left to complete, number of tasks not started, late, in-progress and completed.

A good way to indicate bottlenecks may be to look at the tasks that are late. ✓





Integrations

Are there any integrations with Microsoft Project and/or a Gantt Chart view for a plan?

No, not currently.



Planner Best Practices

How do you recommend balancing work in MS Project Schedules vs tasks in Planner to ensure Resources are not excessively overloaded?

MS Project and Planner serve two distinct roles but are not necessarily mutually exclusive. An MS Project Schedule defines the execution of a project and aids in the control of a project throughout its execution. Planner is a task management tool that supports the Project Schedule in a dynamic, flexible, and collaborative way. Think of Planner as an extension of MS Project – it allows you to manage project activities and deliverables at a much more granular level in order to hit the deadlines/milestones outlined in the Project Schedule. Many of the tasks that belong in Planner do not belong in MS Project because they are too small to manage in MS Project.

Planner offers a very easy to use interface and visual way to evaluate the distribution of work across resources. Plan Charts is a fantastic feature that can help you easily identify team members who are overloaded with tasks as well as those who can take on more work.

Can you use Planner as a personal project management tool?

While it is intended to be a tool to organize group work, it can 100% be used as a personal project management tool. Get creative! You can have different plans for different responsibilities in your role.

For example, in Marketing, I have different Plans for Blogs, Webinars, and Sales Enablement Tools. Within each plan, I can then get more granular in these responsibilities. For my Blog Plan, I have separated each blog subtopic with buckets, and then included blog titles to complete in each.

I want to use Planner for running and keeping my marketing department organized. How can I create meeting agendas, to do lists, etc.? And keep them separate?

If you're wanting to use Planner to organize your department, there are many ways you can do this. One recommendation is to use different plans to separate various initiatives in your department. For example: Website, Blog, Webinars, Case Studies, PR, and so on...

The O365 Groups feature better suited for meeting agendas is the Notebook. Action items would fall into each project or initiative for which there is a separate Plan.

What kind of document control abilities are there within a plans document library? Versioning, comments, access control, collaboration, sharing between plans etc.

Documents you see in Planner Tasks are actually links to the files in the associated O365 Group's OneDrive. All document control capabilities available in OneDrive apply in this case. Planner does not offer additional functionality on top of OneDrive. For more information on this start here.

What is better—Planner or Trello?

Good question. We prefer Planner as it integrates with Office 365 well. For an unbiased review of both Planner and Trello [check out this article](#).

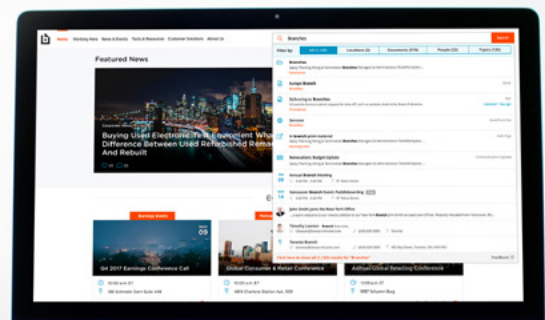
Features Coming Soon

What are some of the additional features Microsoft has planned for future release?

Currently there are 10 Office 365 Planner features in development:

- Ability to assign a task to multiple people in Planner.
- Custom backgrounds to reflect company brand or general theme.
- External (guest) user access to Planner.
- General availability of Office 365 tasks API for programmatic access to the Planner task data.
- Refined mobile web experiences made available in the Windows Universal App.
- Administrators will be able to configure policy for appending text in Office 365 Groups no matter where the group is created (ie. Planner). Admins will also be able to configure a list of blocked words that can be used in group names.

- Planner App for iOS and Android devices.
- Integration with Professional Learning Communities (PLC) which includes pre-configured custom buckets and tasks to enable PLC planning scenarios.
- Templates to leverage out of the box plans or custom created ones for consistent use across Plans.
- Timeline view so teams can share key milestones.



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