What is Planner?

Planner is one of the Microsoft 365 apps available to uOttawa employees to help them keep track of projects and tasks within their Microsoft teams. If you are a member of a Microsoft 365 team you can start organizing your work through tasks in Planner.

It provides a hub for team members to create plans, organize and assign tasks to different users and to share progress updates through dashboards.

How do I access Planner?

You can access Planner through your Microsoft 365 account online.
You can also see plans for which you are a member of through Teams.
You can also download the Planner Application to your desktop or tablet.

How do I use Planner?

Step 1: Create a plan

Create plans for large projects that have multiple components and sub-tasks. **Example:** You can create a plan called Four-Year Strategic Plan since this would be a plan that involves many projects and tasks. An easy way to create a plan is to do so in Teams. Select a specific channel; click on the +; select Planner; select "create a new plan"; enter the name of the plan. It will show as a tab and be available to every team member who has access to that channel.

Step 2: Add people to your plan

Create team engagement. Since plans are created for Microsoft 365 groups, your team members are already included in the plan. You can add people external to the University as plan members if they are key players in achieving tasks. **Note:** If you remove team members from your plan, they will also be removed from your team in Microsoft Teams.

Step 3: Set up buckets to organize your tasks

Separate your tasks into different categories, Buckets, such as project phases, or topics. **Example:** Your Four-Year Strategic Plan can have multiple buckets for each component of the plan. i.e. Bucket 1-Human Resources planning, Bucket 2- Legacy system decommissioning, Bucket 3- Internal policy and procedure revision, etc.

Step 4: Add tasks to your plan

Your plan can only be completed if you assign tasks to team members involved. Add tasks to your created buckets and assign these tasks to people. Include start and end dates so that you can track tasks easily. **Note:** adding start and end dates to tasks ensures that they are included in the analytics of your overall plan and you will have a very accurate representation of your plan's progress.

Step 5: Track your progress

Monitor your plan's progress using the board and charts. The board offers a flexible way to organize and view your team's work, see who's assigned to a task and get/share additional task details. The charts show how your plan is progressing with details about what's completed, in progress, not started, and late. You can filter the view to customize the aspects of your plan you want to focus on as well.

Track tasks assigned to you

- People will automatically receive email and Microsoft Teams notifications when tasks are assigned to them.
- You can also view the Planner app in Teams to see all tasks assigned to you.

Learn more about how to use Planner.

Information Management when using Planner

Plans that are of strategic and operational nature need to be managed accordingly. Read the What to Keep Information Management best practice for details about strategic and operational value. If your plan needs to be kept for long-term preservation, it should not remain in the Planner app once it is completed. Export the plan to another shared document repository so that it can be managed for future preservation and access. Learn how to export plans.

As with any project management, teams should determine who among them is responsible for creating and managing plans, as well as assigning tasks to different team members.

Access to Information and Protection of Privacy

The *Freedom of Information and Protection of Privacy Act* (FIPPA) applies to Planner and once an access to information request is received, employees must search all information under their custody or control, including information entered in Planner. Once an access to information request is received, it is a criminal offence to delete or alter the information. Contact the Access to Information and Privacy Office if you have any questions.